
An analysis of UK TNE in Spain

**Models of good practice, legal framework
and market opportunities**

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Executive summary

Spain as a TNE destination

Spain represents a **unique and underexploited opportunity** for British Higher Education Institutions (HEIs) seeking to expand their global footprint through Transnational Education (TNE). With a strong HE tradition, a growing and diverse population, relatively favourable regulatory conditions, and an increasing demand for international education, Spain emerges as a prime destination for UK universities to implement sustainable and high-quality TNE models. This document aims to provide strategic insights and actionable recommendations for UK HE managers to design and deploy successful TNE initiatives in Spain.

Spain offers an **exceptional quality of life**, ranking first globally in the 2024 Forbes Quality of Life Index for expatriates. Cities such as Valencia, Málaga, Alicante, Madrid, Barcelona and many others consistently attract **international professionals and students** due to their vibrant cultural life, accessible healthcare, and excellent transportation systems. The country also ranks among the top two most visited destinations worldwide (UNWTO, 2024) and the third worldwide destination for UK students within the Turing programme, reinforcing its global appeal. Importantly, Spain has experienced a demographic growth of over 1.5 million people in the past four years, reaching nearly 50 million inhabitants (INE, 2025), with a significant influx of young professionals and international students from Europe, Latin America, Asia, and Africa. At the same time, Spain **has a complex ecosystem with 17 devolved education authorities** and heavy bureaucratic processes, which require good understanding by any UK university considering a branch campus or a franchise agreement with local institutions.

The foundation for expanding TNE in Spain is further strengthened by **robust economic and academic ties between the UK and Spain**. As of 2023, the UK's Foreign Direct Investment (FDI) stock in Spain amounted to £94.1 billion, accounting for 5.1% of the UK's global outward FDI (UK Department for Business and Trade, 2025). Spain is also a major investor in the UK, with an inward FDI stock of £17.9 billion. These figures reflect mutual confidence and ongoing collaboration across multiple sectors, including education, finance, and infrastructure.

On the academic front, Spain ranked as the UK's 8th most significant **research partner** globally in 2021, producing over 9,600 co-authored scientific publications

that year alone (FECYT, 2021). This vibrant research relationship creates a solid academic basis for future TNE ventures, as existing networks and joint projects can be leveraged to develop and support transnational programmes. These long-standing synergies in research and investment signal fertile ground for UK institutions to deepen engagement through academic delivery and innovation via TNE models.

Spain's higher education sector includes 36 universities ranked in the ARWU top 1,000 and 27 in the QS World Rankings 2025. Despite a mid-range international ranking for most universities, **the system is well-established and committed to internationalisation**. This environment supports diverse forms of academic collaboration and provides UK institutions with access to capable partners, high-quality students, and growing demand for English-medium instruction and globally recognised degrees.

Currently, TNE in Spain is underdeveloped compared to peer countries like Germany or the Netherlands. Existing UK TNE initiatives are limited to double degrees and franchised programmes, with no UK branch campuses to date. However, positive trends are evident: Spanish enrolments in UK TNE programmes grew by 45% between 2014 and 2022, even amidst Brexit and mobility challenges (HESA, 2023).

Successful Case Studies in Spain

Two British-Spanish collaborations exemplify the success of TNE models:

- The University of Strathclyde and Universidad Pontificia Comillas launched a dual **Master's in Smart Grids**, combining 60 ECTS at each university with an industry placement at Iberdrola. Nearly 100% of graduates find employment immediately, thanks to the programme's alignment with global labour market needs.
- EADE Business School in Málaga, authorised to deliver UK degrees in collaboration with the University of Wales Trinity Saint David, **offers franchise-based Bachelor's and Master's programmes**. Their affordable cost structure, combined with academic oversight from UWTSU, attracts both local and international students.

Strategic Priorities for UK Universities

The report identifies key actions for British HEIs based on an in-depth SWOT analysis and a roadmap for implementation with the following key recommendations to increase the scope and impact of UK TNE in Spain:

- **Maintain academic excellence and UK HE's global brand value.** The strong international recognition of British qualifications continues to be a decisive factor for students choosing UK-affiliated programmes.
- **Correct barriers such as affordability and low brand visibility** for medium-sized UK institutions. **Modular pricing, digital and hybrid delivery,** and Spanish language support can broaden reach.
- **Explore opportunities through low market saturation,** institutional openness in Spain, and demand from non-EU students. **Joint degrees and franchises are particularly well-positioned to succeed with other locally supported models** being very promising and underexplored.
- **Adapt to external threats** such as EU competition, ageing demographics, and post-Brexit mobility limitations by targeting new demographics (e.g., adult learners, third-country students) and **integrating employability pathways into curricula.**

Implementation Roadmap

A successful TNE initiative in Spain should follow a **structured three-phase approach**:

1. Preparation & Authorisation:

- Conduct strategy **alignment and feasibility analysis** (2 months).
- Select **partners and explore legal frameworks** (3–8 months).
- **Secure approvals** from Spanish regional authorities and the Ministry of Foreign Affairs. This can usually take a longer than expected period (12 months).

2. Operations Design:

- **Define academic programmes,** staffing plans, assessment policies, and quality assurance mechanisms (1–3 months per activity).
- Integrate **digital learning platforms** and student support services (2M).

3. Daily Management:

- Managing **shared governance structures.**
- Monitor **academic delivery and quality through periodic reviews.**
- Ensure **financial and administrative oversight** through continuous institutional cooperation.

Estimated **initial investment** for a medium-sized TNE branch campus ranges from €15M to €25M, with annual operational costs between €4M and €6M. Franchised models benefit from **local infrastructure and staffing, showing significantly lower set up costs. Tuition fees** in Spanish TNE settings are typically 40–60% lower than UK-based campus options, increasing accessibility for domestic and third-country students. Strategy alignment with local franchises should be one of the cooperation drivers to build successful franchise-based initiatives.

Decalogue for Effective TNE Implementation in Spain

1. **Align TNE initiatives** with the institutional internationalisation strategy and measurable KPIs.
2. **Select Spanish partners** based on governance compatibility, academic strength, and commitment to TNE.
3. **Understand regional accreditation** and authorisation pathways early in the process.
4. **Ensure academic excellence** and dual compliance with both UK and Spanish QA frameworks.
5. **Leverage bilingual instruction** models to broaden appeal, especially for Latin American markets.
6. **Build strong industry ties** for student placement and employability outcomes.
7. Offer **flexible pricing and blended learning** to accommodate cost-sensitive audiences.
8. **Establish governance models for long-term financial sustainability** and institutional alignment.
9. **Invest in co-branded marketing** tailored to local and international student segments.
10. Monitor performance through **regular academic and operational audits,** adapting models as needed.

I) Introduction; TNE in Spain as an opportunity

Transnational Education (TNE) presents a significant opportunity for British universities aiming to broaden their global footprint, with Spain emerging as a particularly promising partner. Spanish HE's commitment to internationalisation is evident in the increasing number of degree programmes offered in English across both public and private universities and the increase in the number of international students in the country. This trend enhances **Spain's appeal as an educational hub**, making it an attractive location for British institutions to establish TNE partnerships, joint degrees, franchises or even branch campuses.

The country's allure is further amplified by its exceptional quality of life. Spain consistently ranks some of its well-known cities at the top of the **Quality of Life city Index** for expatriates, securing the first position for the third consecutive year in 2024 (FORBES, 2024). Factors contributing to this ranking include a pleasant climate, rich cultural offerings, and a robust healthcare system. Notably, cities such as Valencia, Málaga, Alicante and Madrid have been recognised among the best in the world for expatriates, praised for their accessible public transportation, abundant leisure opportunities, and welcoming environments. **Spain's popularity as a destination** is also reflected in its tourism industry and the growing expatriate population. The country is among the two most visited globally (UNWTO, 2024) and has experienced significant growth in its international and expatriate communities. This cosmopolitan atmosphere enhances its attractiveness to international students. The country has been consistently ranked as the first destination for exchange Erasmus students in Europe.

In recent years, Spanish universities have seen a substantial increase in enrolments from students originating from Latin America, Asia, and Africa. This surge underscores Spain's potential as a gateway for international education. The **combination of a UK-based curriculum with Spain's affordability and high quality of life makes it an appealing study destination**, especially for students seeking globally recognised qualifications at a more affordable cost compared to studying in the UK. Geographical proximity between UK and Spain and the settlement into similar cultural Western European environments, offer cultural complementarity advantages both for students and staff that will add value to TNE projects.

The internationalisation efforts of Spanish universities over the past two decades have significantly enhanced their global standing. Institutions have actively **improved their international student ratios**, research collaborations, and mobility agreements. This progress reflects a broader commitment to fostering a diverse and inclusive academic environment.

The linguistic advantage of leveraging both Spanish and English—amongst the most spoken and studied languages worldwide—positions Spain as an ideal location for British institutions to attract international students. Many students from Latin America, Africa, and Asia consider **Spain a natural choice for higher education**, given the opportunity to develop bilingual proficiency while obtaining a UK-accredited degree.

The Spanish government, along with regional and local administrations, has increasingly recognised the **economic value of higher education internationalisation** (Grasset & Garcia, 2024). This recognition has led to policy support and financial incentives aimed at fostering partnerships with

international institutions as it was even highlighted by the Spanish mainstream regulation of HE (LOSU, 2023). With internationalisation increasingly seen as a key revenue-generating channel, British universities can benefit from a relatively favourable regulatory and financial environment when establishing TNE models in Spain.

Moreover, Spain's diverse higher education sector, comprising public and private universities and authorised higher education institutions, offers British institutions a flexible range of collaboration options. The Spanish HE sector has a long-standing research and teaching tradition and the system occupies a **consistent well-referenced segment within international research rankings according to impact**.

The **sustained increase in Spain's population**—1,5 million people more in the last 4 years, rapidly approaching the 50 million people benchmark; INE (2025)—, including a significant influx of young professionals seeking further education and career development, further supports the long-term viability of TNE investments. By capitalising on these factors, UK institutions can strengthen their presence in Spain, ensuring mutual benefits for both higher education systems.

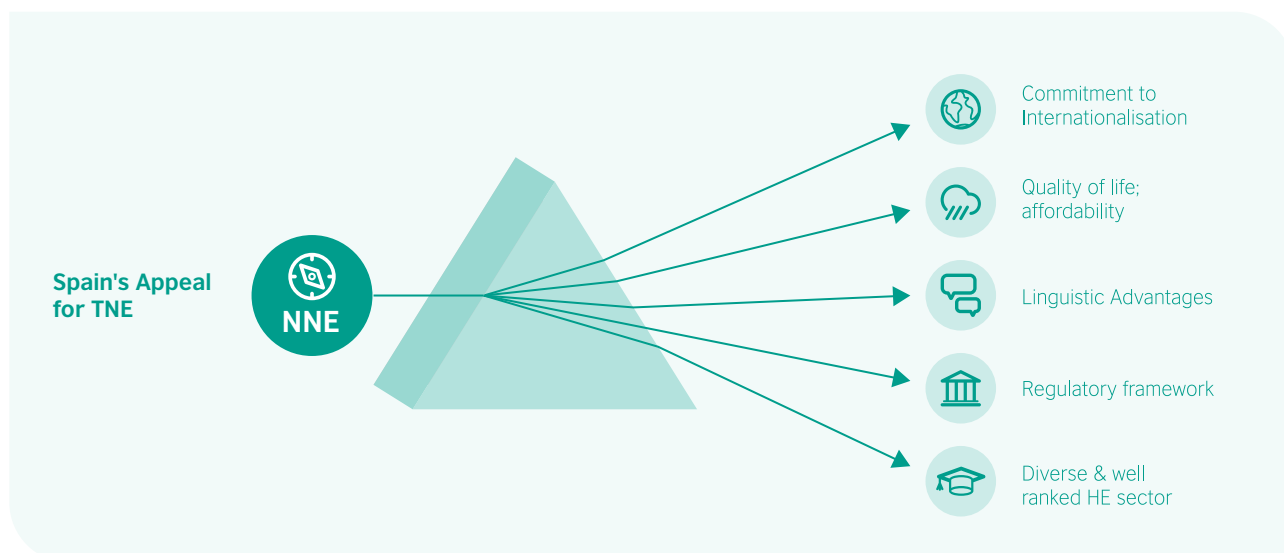
This academic collaboration in terms of TNE should be mirrored somehow in the **strong financial and economic collaboration between the two countries**. The robust economic relationship between Spain and the United Kingdom is underscored by substantial bilateral foreign direct investment (FDI). As of 2023,

the UK's outward FDI position in Spain stood at £94.1 billion, representing 5.1% of the UK's total outward FDI stock. Conversely, Spain's investment in the UK amounted to £17.9 billion, accounting for 0.9% of the UK's total inward FDI stock (UK Department for Business and Trade, 2025). Notably, in 2023, **the UK emerged as the second-largest source of FDI into Spain**, contributing 13.1% of total investment flows, following the United States, which accounted for 28.9%.

Furthermore, research collaboration between British and Spanish universities is both longstanding and strategically significant. In 2021, Spain ranked as the **8th most important worldwide international research** partner for UK universities, with over 9,600 co-authored scientific publications produced that year (FECYT, 2021). These figures highlight the significant reciprocal investment and academic positions both nations hold in each other's economies, reinforcing the foundation for enhanced academic collaboration, particularly in Transnational Education (TNE). The Spanish HE appeal to the UK is also supported by data confirming Spain as the second most popular destination for UK students within the Turing scheme (UK Department of Education, 2025).

The combination of Spain HE sector's strong commitment to internationalisation, exceptional quality of life, linguistic advantages, and, in some cases, supportive governmental policies, creates a highly conducive environment for British universities to implement TNE models. Despite these favourable conditions, **the number of established TNE initiatives in Spain remains relatively limited**.

Figure 1. Spanish Appeal for TNE



compared to other international markets, indicating that the full potential for TNE development has yet to be fully explored. This report is therefore essential in highlighting the **untapped opportunities** within the Spanish HE landscape and guiding British institutions towards strategic collaborations that could yield mutual benefits.

Currently, Spain's TNE landscape is marked by a relatively small number of initiatives, often limited to joint programmes or double-degree agreements. **Large-scale partnerships such as branch campuses or franchised degrees are far less common than in other European countries.** This limited activity underscores a significant opportunity for British universities to pioneer new TNE models and capitalise on Spain's increasing attractiveness as a higher education hub. Furthermore, the relatively low saturation of the TNE market means that British institutions can enter a competitive space with fewer barriers and more room for innovation in their offerings.

The growing demand from third-country students, particularly from Latin America, Asia, and Africa, further highlights the potential for expansion. Spain's appeal as a study destination, with its lower cost of living and culturally rich environment, is complemented by the ability to pursue a UK-based curriculum within a globally recognised academic framework. For British institutions, this represents an opportunity to **extend their international brand and increase their global student recruitment numbers through TNE partnerships.**

Moreover, Spain's ongoing internationalisation efforts, supported by national and regional administrations, provide a favourable policy backdrop for TNE expansion. Public and private universities in Spain are increasingly open to international collaborations,

recognising the value of TNE models in enhancing their academic offerings, research output, and global competitiveness. The combination of local institutional interest and international demand presents a **strategic opening for British universities** to establish a strong presence within Spain's evolving HE landscape.

Therefore, this report is both timely and necessary. By analysing current trends, identifying gaps, and highlighting opportunities, it aims to support British universities in developing a strategic approach to TNE expansion in Spain. The relatively underdeveloped TNE market, combined with Spain's favourable educational and socio-economic environment, positions the country as an ideal destination for future TNE growth. British institutions that act now can establish a pioneering role, building sustainable partnerships that will benefit both the UK and Spanish higher education sectors for years to come. The study has been structured according to the following sections: definitions and background of TNE in Spain; a description of the HE sector; the legal framework applicable to TNE in the country; an outline of current interest on Spanish students on the UK HE sector; the current mapping of TNE initiatives in the country; benchmark on case study analysis, a SWOT analysis on TNE education in Spain and a final section with recommendations and a strategy roadmap for British institutions willing to implement TNE practices in Spain.

ii) Definitions and background of UK Transnational Education in Spain

Table 1 summarizes the existing TNE models, each offering distinct features, benefits, and challenges. The main features of the models are outlined below:

Autonomous Models

Branch Campuses involve the establishment of a physical campus in Spain by a British institution, enabling students to earn degrees identical to those offered at the home campus. While this model enhances institutional prestige and provides high-quality education locally, it involves high operational costs, regulatory hurdles, and cultural adaptation challenges. However, the immersive experience and cultural exchange opportunities it provides are unmatched.

Distance and Online Learning

Distance Learning and Online Provision eliminates the need for physical presence, offering flexible study options and reduced education costs. These programmes are particularly attractive for students balancing work and studies or seeking affordable alternatives. Nevertheless, challenges such as limited face-to-face interaction and concerns over academic integrity and assessment must be addressed to ensure success.

Locally Supported Models

Franchise agreements allow local Spanish institutions to deliver British programmes under the branding and standards of the British institution. This model expands access to reputable education and enhances institutional visibility. However, quality assurance and maintaining institutional oversight can be complex. Blended Learning, combining online content with in-person local support, offers a balanced approach,

improving student engagement. Logistical challenges and the need for effective coordination remain key concerns.

Collaborative Models

Joint Degree Programmes involve partnerships between British and Spanish institutions, awarding a single degree issued by both. These programmes enrich the student experience through academic diversity and multicultural exposure, although quality assurance and compatibility between academic systems can be difficult to manage. Similarly, Double or Multiple Degree Programmes provide students with degrees from both institutions, broadening academic resources and boosting employability. Challenges include resource allocation and the alignment of academic standards.

By strategically leveraging these TNE models, British universities can cater to diverse student needs in Spain, balancing accessibility, quality, and institutional visibility, while addressing potential demands of the Spanish higher education market (British Council, 2024a).

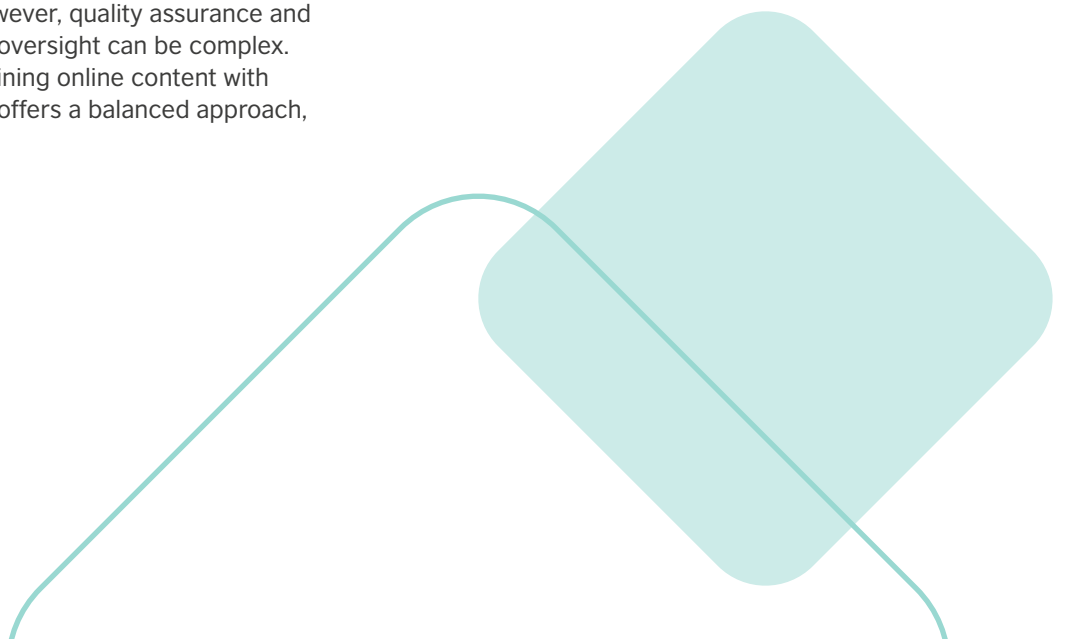


Table 1. A TNE model taxonomy

TNE Model	Features	Challenges	Benefits
Autonomous			
Branch Campus	A physical campus established in a foreign country by a foreign institution, offering degrees or qualifications from the home institution.	High operational costs, regulatory compliance issues, cultural differences, potential for local market development.	Access to high-quality education locally, cultural exchange, enhanced global institutional prestige.
Distance Learning and Online Provision	Programmes delivered online, enabling students to study remotely without physical attendance.	Limited face-to-face interaction, academic integrity concerns, potential lack of motivation among remote students. Issues concerning assessment.	Flexible study options, accessible academic resources, reduced cost of education.
Locally Supported			
Franchise	Local institutions are licensed to deliver the programmes of a foreign institution, with branding and standards of the foreign institution.	Limited institutional oversight, challenges in quality assurance, potential local market saturation or exploitation.	Expanded access to reputable education, enhanced cultural exchange, improved institutional visibility.
Blended Learning	Programmes are delivered through a mix of online and in-person support, facilitated by local institution(s).	Quality control over local tutorial support, logistical challenges in the coordination of blended learning models.	Enhanced student engagement compared to fully remote programmes, improved educational experience.
Collaborative			
Joint Degree Programme	Partnership between institutions in different countries awarding a single degree jointly issued by the participating institutions.	Quality assurance complexities, compatibility issues between different academic systems, resource allocation concerns. Accreditation of studies should be done by different authorities.	Diverse academic exposure, multicultural experience, improved employability.
Double or multiple degree programme	Students earn two or more degrees from institutions in different countries, often involving study at both institutions.	Resource constraints, compatibility of academic standards, and quality assurance complexities. Potential change in syllabus and programme structure.	Broadened academic resources, enhanced employability, development of advanced language and intercultural skills.

Figure 2 showcases the evolution of UK TNE modes in the EU in the last few years. The transnational education (TNE) landscape has evolved significantly. Overseas campuses, though initially low in enrolments, have grown steadily in recent years. Distance, flexible, and distributed learning has remained dominant, peaking in 2020/21 before declining slightly. Other distance learning arrangements have steadily increased, reflecting a shift towards alternative remote methods. Overseas organisation-led TNE (including franchises)

has fluctuated but saw strong growth in the most recent year, indicating evolving international partnerships. Total TNE enrolments within the European Union have generally risen, with 2022/23 reaching the highest figure. This reflects a growing demand for cross-border UK education. While distance learning remains key, the rise of overseas campuses and partnerships underscores the diversification of delivery methods, catering to shifting student and institutional needs.

Figure 2. Evolution of UK TNE modes within the EU

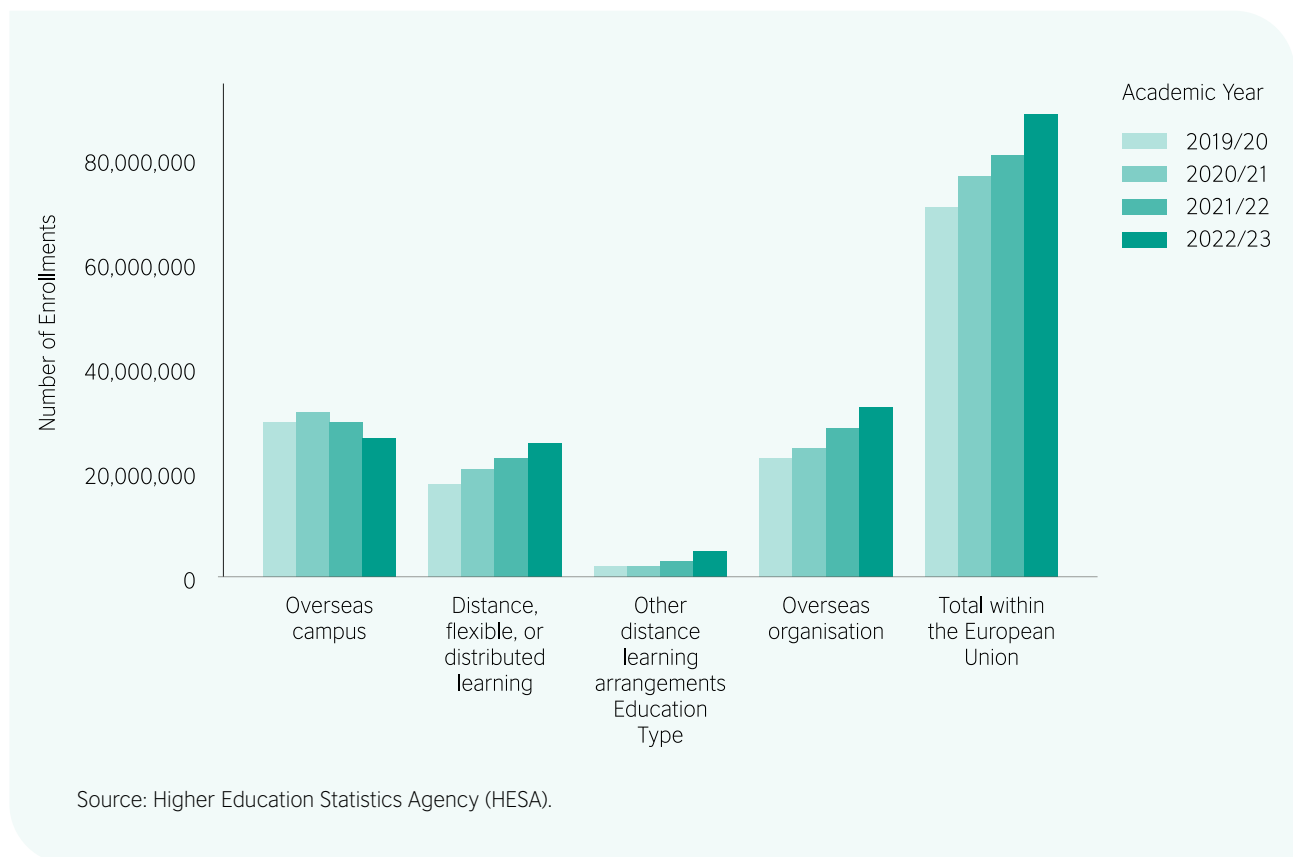
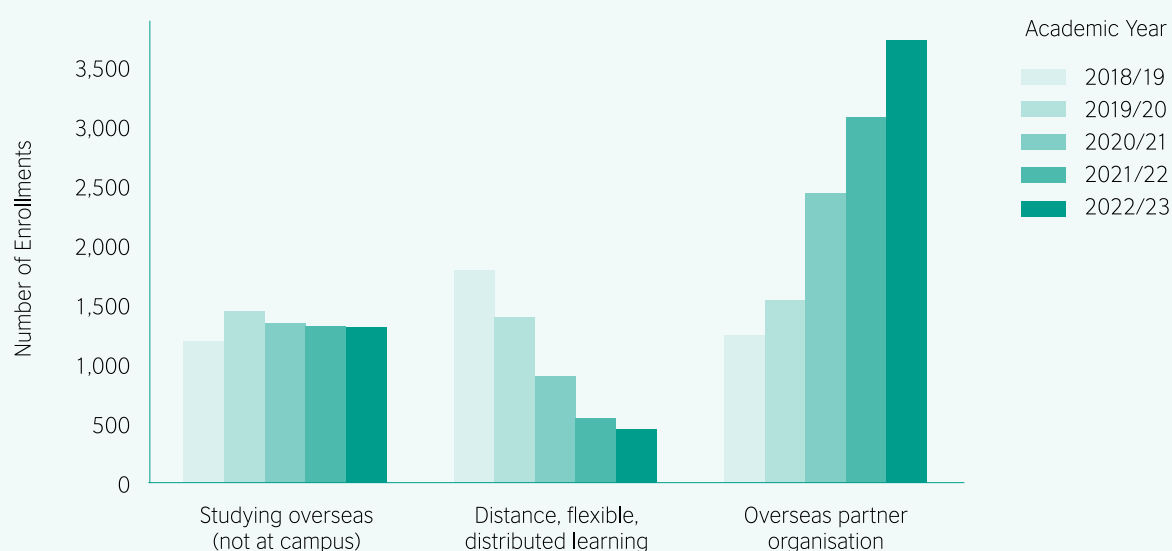


Fig. 3 illustrates the evolution of UK TNE types in Spain from 2018/19 to 2022/23. Studying overseas (not at campus) has remained relatively stable, with minor fluctuations. Enrolments through overseas partner organisations have shown steady and significant growth, more than tripling over the five-year period.

In contrast, distance, flexible, and distributed learning have steadily declined. This trend suggests a shift in student preference towards more independent or directly delivered forms of TNE, reflecting evolving institutional strategies and learner expectations in the Spanish context.

Figure 3. Evolution of UK TNE modes in Spain



Source: Higher Education Statistics Agency (HESA).

iii) Cross-national comparative analysis. TNE opportunities in Spain and other European countries

Table 2 presents a comparative analysis of **Spain** with other two European countries with a strong background in TNE: the Netherlands, and Germany regarding key factors influencing higher education and transnational education (TNE) opportunities. Overall, **Spain stands out** for its rapid **population growth**, increasing **international student inflows**, and strong bilingual education offering (Spanish-English), which has been steadily growing in the last few years. It also has a relatively favourable regulatory environment, **exceptional quality of life**, and **low saturation** of British TNE institutions, making it an attractive destination for international partnerships.

The Netherlands, while maintaining a **highly ranked** higher education system, faces a **saturated market** for British TNE and high living costs. Despite its strong position, supported by the widespread availability of English-taught programmes and a stable demand from third-country students, particularly from Asia and

Africa, recent **regulatory modifications** in immigration policies may **negatively impact the growth of TNE**. These changes could pose additional barriers for international students and institutions seeking to establish partnerships. These latest immigration regulations introduce uncertainties that may hinder the sector's future expansion, especially in an **already highly competitive market** with numerous existing British TNE partnerships.

Germany, known for its **strong technical and research-oriented programmes**, presents a moderately saturated market for British TNE. The country faces demographic challenges with an ageing population and recent economic difficulties, which could impact the higher education sector. Although it offers a good quality of life, higher living costs and administrative barriers make it less expatriate-friendly. Bilingual education is not a prevalent advantage in Germany, which may hamper future developments in TNE.

Table 2. TNE international comparison

Factor	Spain	The Netherlands	Germany
Quality standards in Higher Education	Strong HE tradition with 36 universities out of 91 in ARWU top 1000 and 27 in QS 2025. Strong research collaboration.	High-quality HE system, with 13 out of 55 universities in ARWU top 1000, 2024. Strong research output and established partnerships.	Renowned HE with 51 out of 428 universities in ARWU top 1000, 2024; strong technical and research-oriented programmes.
Demographic trends	Rapid population growth (+1.5 million in 4 years), increasing international student inflows, particularly from Latin America, Asia, and Africa.	Stable population growth with strong international student presence.	Stable but aging population; increasing international student numbers from Asia and Africa.
Saturation in the market of other British TNE	Low market saturation offers British universities first-mover advantage with room for innovation.	Highly saturated market with many existing British TNE partnerships.	Moderately saturated market, but opportunities remain in business, technical and engineering fields.
Expectations of student interest in other third countries	High demand from Latin American, Asian, and African students due to cultural ties and bilingual opportunities.	High demand from third-country students, particularly from Asia and Africa.	Consistent interest from third-country students, particularly from Asia and Africa.
Programmes in English	Rapidly increasing number of programmes in English at public and private universities.	Widespread availability of English-taught programmes at all levels.	Moderate number of English-taught programmes, primarily at the master's level.
Bilingual advantage in Higher Education	Unique advantage of bilingual education (Spanish and English), appealing to Latin American and international students.	English is the primary language of instruction, but no bilingual advantage.	Limited use of bilingual education (mostly German or English only, with a prevalence of German as a means of instruction).
Economic and labour market prospects	Positive economic growth and increasing demand for highly skilled graduates, supported by UK-accredited programmes.	Strong economy with competitive job markets, particularly in technology and engineering fields. Saturation signs are evident in the last few years though.	Traditionally a strong economy, German performance has been poor in the last few years. A recent industrial and economic crisis remains unsolved and might have implications for its HE sector.
Affordability and quality of life	Exceptional quality of life; Spain cities ranks 1st in the Quality of Life Index (Forbes 2024).	High quality of life but significantly higher living costs than Spain.	Good quality of life, but higher living costs and fewer expatriate-friendly cities compared to Spain.
Legal and regulatory framework	Supportive regulatory environment (LOSU 2023) and national/local incentives for internationalisation.	Favourable regulatory framework, but high competition due to existing TNE models.	Supportive legal framework but administrative and language barriers can be complex for TNE partnerships.

iv) The HE Sector in Spain

A descriptive analysis is provided below on the structure and composition of the Spanish HE system. Mentions are provided to differentiate between accredited universities and authorised institutions. An outline of the stakeholders in the system is also discussed to better understand the relationships between the system actors and drivers. In a second layer of analysis, a description of the population dynamics in the country and the evolution of enrolments are presented to better understand the current situation and future trends of the system.

The HE system in Spain: accredited universities and authorised HE institutions

Spain's Higher Education (HE) accreditation system plays a pivotal role in shaping the quality and structure of the country's university programmes. The system operates through a blend of national and regional agencies, ensuring compliance with the European Higher Education Area (EHEA) standards. At the national level, the National Agency for Quality Assessment and Accreditation (ANECA) oversees the evaluation, certification, and accreditation of universities and their programmes. As a public body, ANECA is fundamental to maintaining the quality and international competitiveness of Spanish HE, fostering continuous improvement and alignment with EHEA educational programme benchmarks.

In addition to ANECA, Spain has ten regional accreditation agencies that complement its efforts by catering to the specific needs and contexts of various autonomous regions. These agencies include:

- Agencia Andaluza del Conocimiento (ADEVA)
- Agencia de Calidad y Prospectiva Universitaria de Aragón (ACPUA)
- Agencia de Calidad Universitaria de las Islas Baleares (AQUIB)
- Agencia Canaria de Calidad Universitaria y Evaluación Educativa (ACCUEE)
- Agencia para la Calidad del Sistema Universitario de Castilla y León (ACSUCYL)
- Agencia para la Calidad del Sistema Universitario de Cataluña (AQU)
- Agencia Valenciana de Evaluación y Prospectiva (AVAP)
- Agencia para la Calidad del Sistema Universitario de Galicia (ACSUG)
- Fundación para el Conocimiento Madri+d (Madrimsd)
- Agencia de Calidad del Sistema Universitario Vasco (UNIBASQ)

Each regional agency functions within the parameters set by the EHEA, focusing on local HE institutions and their unique challenges. Regardless of whether accreditation occurs through ANECA or a regional body, all decisions must meet strict quality assurance standards, making accreditation a critical aspect for Transnational Education (TNE) partnerships in Spain.

For British institutions aiming to establish a TNE presence, knowing how to navigate this multi-agency accreditation landscape is essential. Accreditation approval is mandatory for any programme delivered through joint or double degrees. Understanding the procedural nuances and building relationships with both ANECA and relevant regional agencies can streamline approval processes, reducing delays and ensuring compliance.

Key Higher Education Stakeholders and Decision Makers for TNE

Spain's HE landscape is shaped by a diverse ecosystem of stakeholders and decision-makers, each influencing TNE opportunities in different ways.

HE Institutions and Intermediaries

Spanish HE comprises public universities, private institutions, and commercial franchises, each offering unique opportunities for collaboration. Public universities dominate the market and are often involved in joint and double degree programmes with international partners. Private institutions, on the other hand, exhibit greater flexibility, making them ideal candidates for franchise or branch campus models. Understanding the strengths and strategic priorities of these institutions is crucial for UK universities aiming to penetrate the Spanish market effectively.

The student population is a key determinant of TNE success in Spain. Although between 2018 and 2024 Spanish enrolments in UK HE institutions fell by 22% due to the fall in exchange students numbers, TNE students steadily rose during the same period. For UK institutions, this growing trend underscores the importance of positioning TNE models in Spain as cost-effective alternatives offering similar academic prestige and employment prospects.

National and regional HE governing bodies, such as the SEPIE (*Servicio Español para la Internacionalización de la Educación*) are key in facilitating HE collaborations with Spain. The British Council works closely with SEPIE to actively support collaborative agreements, aiming at facilitating networking opportunities as well

The Spanish HE ecosystem

Figure 4 shows a map of Universities in Spain. The Spanish University System consists of 91 universities (50 public and 41 private). Additionally, there are over 1,000 university centres, including schools and faculties, 594 university research institutes, 61 doctoral schools, 57 university hospitals, and 76 foundations. Education is devolved to the 17 regions with some of them forming influential clusters: Madrid, hosting 19 Universities and Catalunya with 12 universities.

UNIVERSIDADES 2015

- Pública presencial
- Pública no presencial
- Privada presencial
- Privada no presencial
- R** Municipios con más de cuatro universidades

Madrid Region (R):

- Autónoma de Madrid
- Complutense de Madrid
- Internacional Menéndez Pelayo
- Nacional de Educación a Distancia
- Pontificia Comillas
- San Pablo-CEU
- Carlos III de Madrid
- Rey Juan Carlos
- Europea de Madrid
- Alfonso X El Sabio
- Camilo José Cela
- A Distancia de Madrid
- Antonio de Nebrija
- Francisco de Vitoria
- Alcalá

Valencia Region (R):

- Politécnica de Valencia
- Valencia (Estudi General)
- Cardenal Herrera-CEU
- Católica de Valencia
- San Vicente Mártir
- Internacional Valenciana
- Miguel Hernández de Elche
- Murcia
- Politécnica de Cartagena
- Alicante
- Jaume I de Castellón
- Rovira i Virgili
- Leida
- Zaragoza
- San Jorge
- La Riga
- Intercultural de La Rioja
- Burgos
- Intercultural Isabel I de Castilla
- Valladolid
- Europea Cervantes
- Miguel de Cervantes
- Pontificia de Salamanca
- Salamanca
- Católica Santa Teresa de Jesús de Ávila
- IE Universidad
- León
- Oviedo
- Cantabria
- Pais Vasco/ Euskal Herriko Unibertsitatea
- Deusto
- Mondragón Unibertsitatea
- Navarra
- Pública de Navarra
- Vic-Central de Catalunya
- Girona
- Autònoma de Barcelona
- Barcelona
- Politécnica de Catalunya
- Pompeu Fabra
- Abat Oliba CEU
- Internacional de Catalunya
- Oberta de Catalunya
- Ramón Llull
- Illes Balears
- San Cristóbal de la Laguna
- La Orotava
- Las Palmas de Gran Canaria
- Extremadura
- Huelva
- Internacional de Andalucía
- Sovilla
- Pablo de Olavide
- Loyola Andalucía
- Cádiz
- Málaga
- Granada
- Jaén
- Castilla-La Mancha

Source: Spanish Ministry of Science, Innovation and Universities (2024).

In order to better understand the current status and expectations applicable to the Spanish HE sector, a study of the evolution of the major population dynamics is developed below, together with an analysis of the evolution of the number of enrolment trends in the system.

Outlook to the Spanish population dynamics

The evolution of Spain's population between 1985 and 2024 demonstrates two distinct patterns (Fig. 5). On the one hand, there is a gradual and steady growth observed prior to the year 2000 and again after 2010. On the other hand, the period from 2000 to 2010 is characterised by a phase of pronounced and accelerated growth, driven primarily by the robust economic expansion that defined this decade. This economic prosperity not only boosted domestic factors contributing to population growth but also significantly enhanced Spain's appeal as a destination for international migration.

In more recent years, particularly following the COVID-19 pandemic, population dynamics have undergone notable changes. The most striking trend has been the significant surge in immigration flows during the 2022–2024 period, with net annual inflows exceeding 600,000 individuals per year. This substantial influx has been instrumental in offsetting

natural demographic declines due to low birth rates and an ageing population, reshaping the country's overall demographic profile.

Moreover, these trends in the general population are reflected in the evolution of Spain's university student population, which highlights broader shifts in demographics and migration patterns. The accompanying graphs illustrate how these population dynamics have influenced higher education enrolment, emphasising the interplay between economic cycles, immigration, and educational trends over the decades.

Data from the Spanish Ministry of Science, Innovation and Universities (*Sistema Integrado de información Universitaria -SIIU-*) shows a steep increase in HE enrolments from 1985/86 to 1999/2000, followed by a stabilisation of enrolment numbers. Future trends point to a flatlining in enrolment numbers, or possibly to a decline due to overall Spanish ageing demographics. Foreign student enrolment has remained residual throughout the period 1985/86 through 2023/24 (although with a relatively sustained increase in the last 8 years). The behaviour of foreign intakes will largely depend upon the enrolment legal framework applied by the Spanish government to non-EU students. UK universities should consider this ageing demographic context in their internationalisation efforts to ensure the appropriate population segmentation and suitable TNE modalities.

Figure 5. Overall evolution of Spanish population. 1985-2024

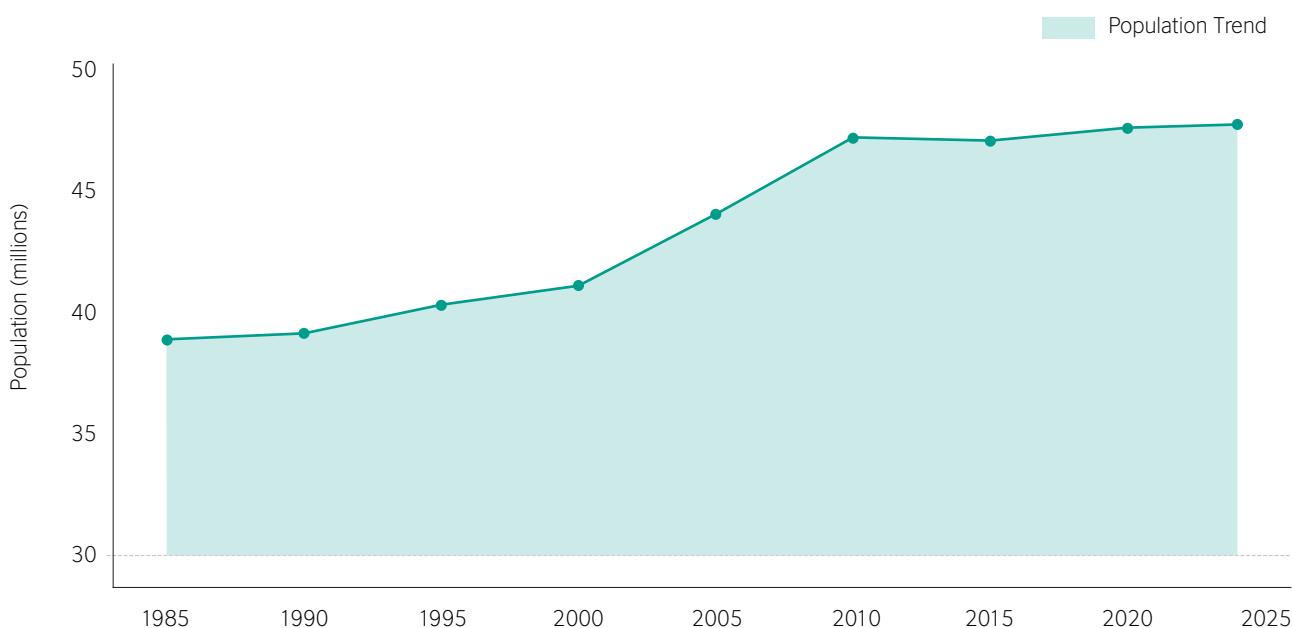
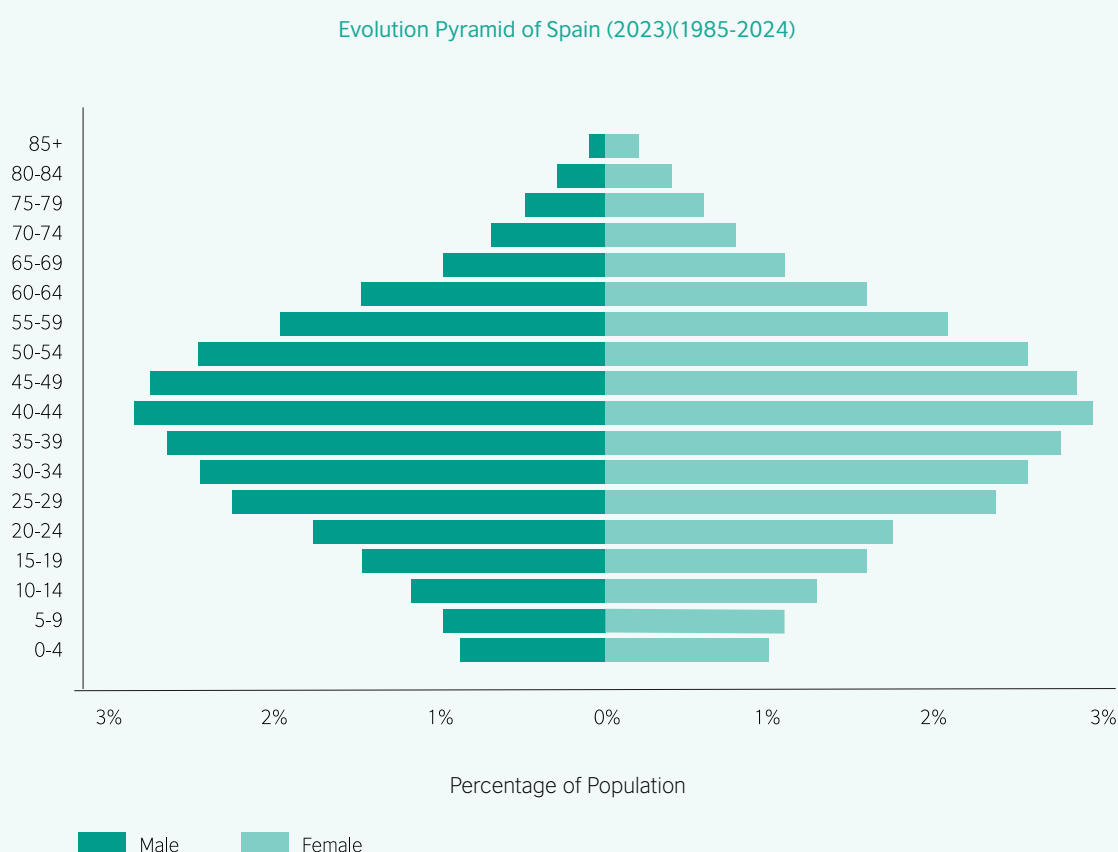


Fig. 6 illustrates the structure of the Spanish population pyramid in 2023. Similar to many other Western countries, Spain has experienced a steady decline in the number of births over the last 30 years. This trend, coupled with significant increases in life expectancy, has resulted in a population that is heavily concentrated within the 35 to 59-year-old age segments. This demographic shift reflects broader societal trends, including ageing populations and shrinking younger cohorts, which have far-reaching implications for various sectors, including transnational education.

The structure of the population pyramid presents particular challenges for the education sector, and higher education (HE) institutions will be among the most impacted. As the proportion of younger age groups continues to decline, the pool of domestic students entering universities is expected to shrink. This will necessitate a greater reliance on international student inflows to sustain current enrolment levels in Spanish universities. Without such inflows, institutions may face difficulties maintaining both their operational viability and their ability to contribute to Spain's knowledge economy.

Figure 6. Spanish population pyramid



Source: Instituto Nacional de Estadística

Historical evolution in HE enrolments in Spain 1985/86-2023/24

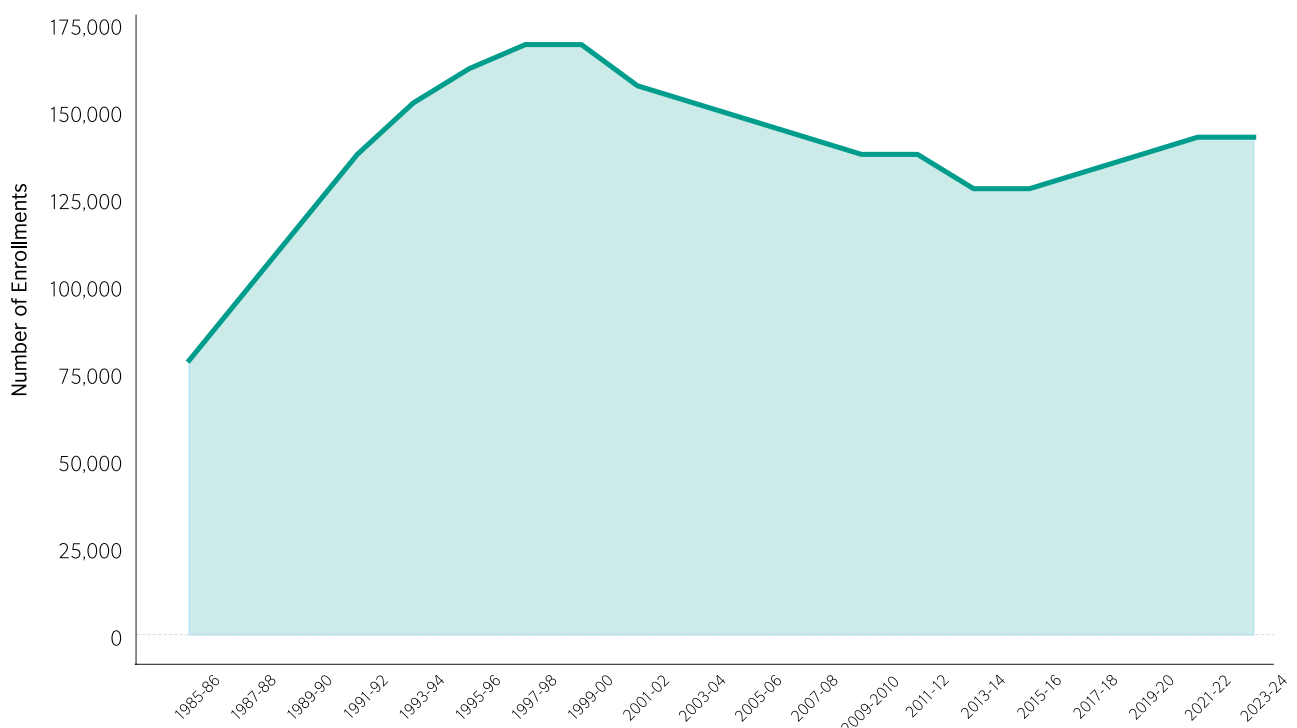
As indicated in Fig. 7, since the academic year 1985/86, the number of undergraduate enrolments in Spain rose steadily for over a decade, reflecting a period of sustained growth in higher education participation. This upward trend continued until it plateaued around the year 2000, reaching a peak of approximately 165,000 student enrolments. This plateau marked a shift in the growth trajectory, as enrolments began to decline steadily thereafter, reflecting changes in demographic trends.

By 2016, the number of undergraduate enrolments had reached its lowest point in decades, with a recorded minimum of approximately 135,000 students. This

significant decline highlights a period of contraction in higher education participation, likely influenced by factors such as declining birth rates, economic uncertainty following the global financial crisis, and the changing landscape of higher education demand.

In recent years, however, there has been a modest recovery in undergraduate enrolments, with figures increasing to approximately 145,000 by the 2023/2024 academic year. This partial recovery suggests a stabilisation in enrolments, potentially driven by renewed efforts to attract students, an increasing focus on internationalisation in Spanish universities, and a growing recognition of higher education as a key to economic and social mobility. The fluctuations in enrolment patterns over the decades highlight the complex interplay between demographic, economic, and institutional factors shaping higher education in Spain.

Figure 7. Bachelor student population in Spain. 1985-2024



Source: SIIU. Sistema Integrado de Información Universitaria. Ministerio de Ciencia, Innovación y Universidades (2024).

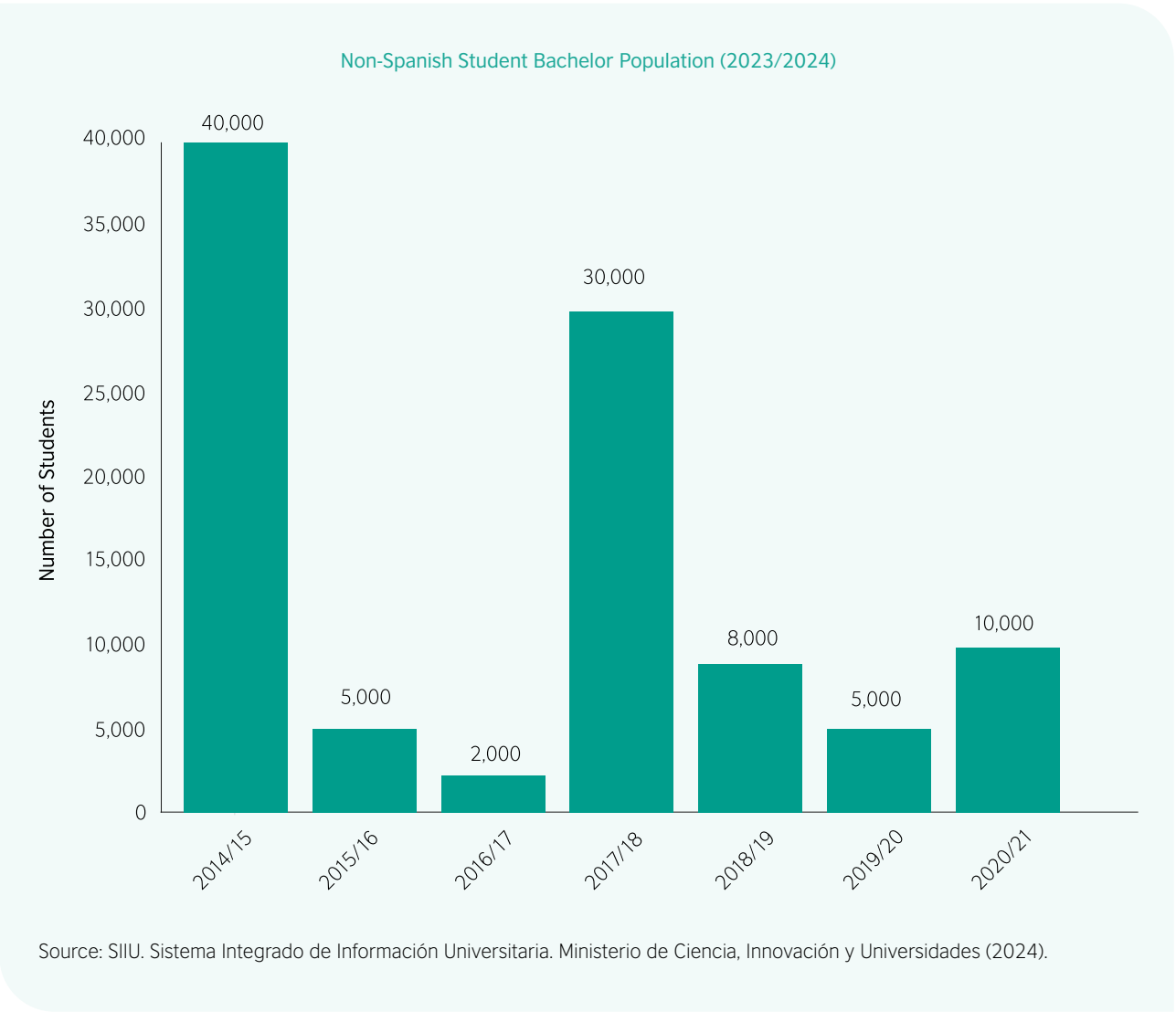
Fig. 8 illustrates how, in the academic year 2023/24, the European Union continues to serve as the principal source of international bachelor students in Spain. This dominance highlights the strong academic and cultural ties within the EU, as well as the benefits of programmes like Erasmus+ and other collaborative initiatives that facilitate mobility within the region. The EU is followed closely by Latin America and the Caribbean, which also represent a significant proportion of the international student population. This reflects historical, linguistic, and cultural connections, as well as Spain’s position as a preferred destination for students from these regions seeking higher education opportunities.

In comparison, the remaining five world regions contribute more modestly to Spain’s international

student numbers. Combined, these regions account for a smaller share, with the two leading regions—EU and Latin America and the Caribbean—making up approximately 43% of the total. This disparity underlines the concentrated appeal of Spanish higher education for students from Europe and Latin America, where linguistic similarities and strong bilateral agreements play a key role in student mobility.

The distribution of international bachelor students across regions highlights the ongoing **influence of historical, cultural, and economic factors** in shaping mobility patterns. It also points to opportunities for Spain to diversify its international student body further by enhancing outreach efforts to underrepresented regions.

Figure 8. Foreign student population. Spain



v) Legal framework applicable to TNE in Spain

A thorough understanding of Spain's legal and regulatory framework is essential for developing effective Transnational Education (TNE) strategies for British Higher Education (HE) institutions. British institutions aiming to establish a presence must align their approaches with the requirements set out by the Spanish legal framework regarding the authorisation of institutions providing international degrees in Spain. Since this report focuses on the implementation of TNE practices, the legal framework will consider just the **options for branch campuses and franchise agreements**, which basically receive the same regulatory treatment (authorising pathway) under the Spanish law. Double degrees do not require authorisation and should universities engage in joint degrees it would be for the Spanish partner to get this accredited by ANECA or the regional quality assurance body. However, joint degrees will require accreditation in Spain that should be carried out and led by the Spanish institution through the corresponding regional or national accreditation agency. Therefore, the legal framework applicable to creation of Spanish accredited universities and the corresponding accreditation of their degree programmes are not discussed in this document.

Requirements for authorisation of Institutions Teaching Foreign University Degrees (franchise agreements)

Authorisation procedure (**Royal Decree 640/2021, articles 14 to 17**):

- Centres offering university or higher education in Spain under foreign systems must obtain authorisation from the relevant Autonomous Community authority.
- This applies to international centres affiliated with Spanish universities or foreign universities operating in Spain, which must comply with their home country's legal and educational requirements.
- Authorisation details, including institution and degree information, are registered with the Ministry of Universities and communicated to the relevant bodies.

Key Requirements for Authorisation:

- Submission of a detailed teaching plan, including degree information, credit load, duration, and teaching staff qualifications.
- Evidence that the degrees are active and comparable in structure, content, and duration to those offered in the foreign institution in its own country.
- Proof that degrees hold the same validity in the issuing country and undergo foreign quality assurance evaluations.
- Written commitment to ensure students can complete their studies if the institution ceases operation.

Administrative Implications:

- Authorised centres must avoid misleading names and provide transparent information to students about the recognition of degrees in Spain (for example, they cannot name themselves as "University").
- Programmes are subject to evaluations by quality assurance agencies, which collaborate on specific evaluation protocols.
- Degrees retain the academic validity of their country of origin, with recognition in Spain governed by specific regulations.

Revocation of Authorisation:

- Authorisation may be revoked for non-compliance with requirements, poor evaluation outcomes for programmes, or misleading information provided to students.
- Revocation decisions must be justified and allow the institution to present its case.

Difference between Accreditation of University Degrees and Authorisation of Institutions delivering foreign university degree programmes

A distinction must be made between the creation of centres with Spanish university accreditation, which are governed by Articles 1 to 14 of the aforementioned **Royal Decree 640/2021**, and the authorisation of educational centres for the delivery of foreign university studies, such as those of British universities. These authorisations are governed by Articles 15 to 17 as it was stated above. This differentiation between accredited university and authorised institution is key to establishing a particular TNE strategy in Spain, since it **differentiates the creation of Spanish universities from foreign universities through franchise or branch campus options**. UK universities must be aware of this distinction and abide by the legal provisions that apply differently to accredited Spanish universities and TNE models. Under Spanish law, moreover, it would not be possible to establish a centre providing university education in Spain if it is not included in either of the two options of accreditation or authorisation, respectively. Non-authorised institutions therefore remain in an area of illegality that would seriously limit the options for degree recognition for their students/studies.

Implications for British TNE Strategies

Understanding and navigating these regulations is critical for British HE institutions aiming to establish a foothold in Spain. Aligning with the LOSU (*Ley Orgánica del Sistema Universitario Español*) and relevant royal decrees ensures compliance and enhances the likelihood of successful collaborations with Spanish HEIs. Furthermore, leveraging the flexibility in degree structures and focusing on inclusivity, governance, and academic excellence will position British institutions as credible partners in Spain's dynamic HE market.



vi) Interest of Spanish students in UK Higher Education: some facts and figures

The interest of Spanish nationals and Spanish residents in UK higher education has been affected by two different and lately opposed trends. On the one hand, the interest by Spanish degree-seeking students in UK universities has been increasing over time and particularly after the pandemics. On the other hand, the flows regarding credit mobility has been seriously affected by the post-Brexit scenario, leaving a descending trend in the last few years. These two opposed behaviours may entail the existence of undergoing opportunities for future TNE development by UK universities in Spain. The relative decline of the credit mobility model against the increasing appeal of long-term, degree orientated forms of international HE confirms the expected potential of TNE models in Spain.

Fig. 9 showcases how between the academic years of 2018/19 and 2022/23, all EU countries with the

exception of Ireland, showed a sharp decline in terms of the overall number of students in UK HE. Interestingly, a first group of EU countries with a long tradition of TNE in the UK such as Greece and Cyprus, showed a sharp student decrease for this period (an average decline of 55% among the 2 nations). A second group of countries composed of Germany, Italy, Romania and Poland followed closely this downward trend with an average student decline of 35-40%. In contrast, countries such as Spain kept a relatively smoother student number decline for the same period (approx. 15-20% decrease). In all cases, economic reasons underpin the significant decline in figures, particularly due to the substantial increase in tuition fees for European students following the full implementation of Brexit. Another contributing factor has been the tightening of British visa regulations for international students, which has further discouraged enrolment.

Figure 9. Evolution of Spanish and other EU and non-EU nationalities studying in UK HEs (degree-seeking)

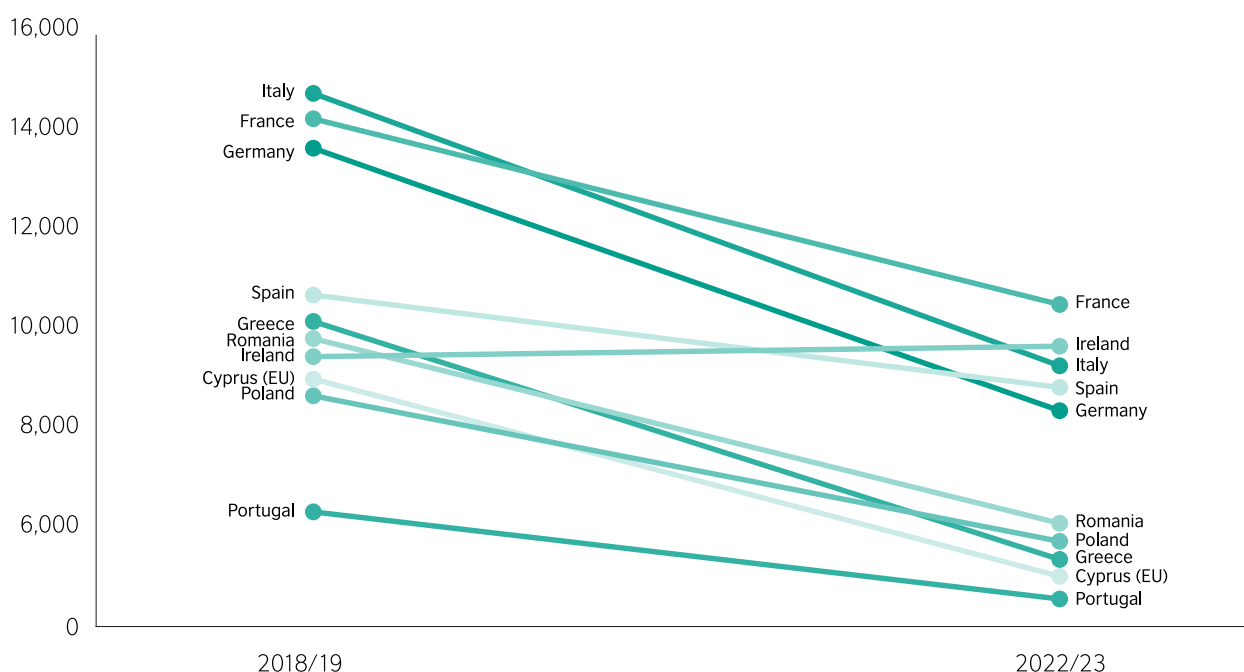
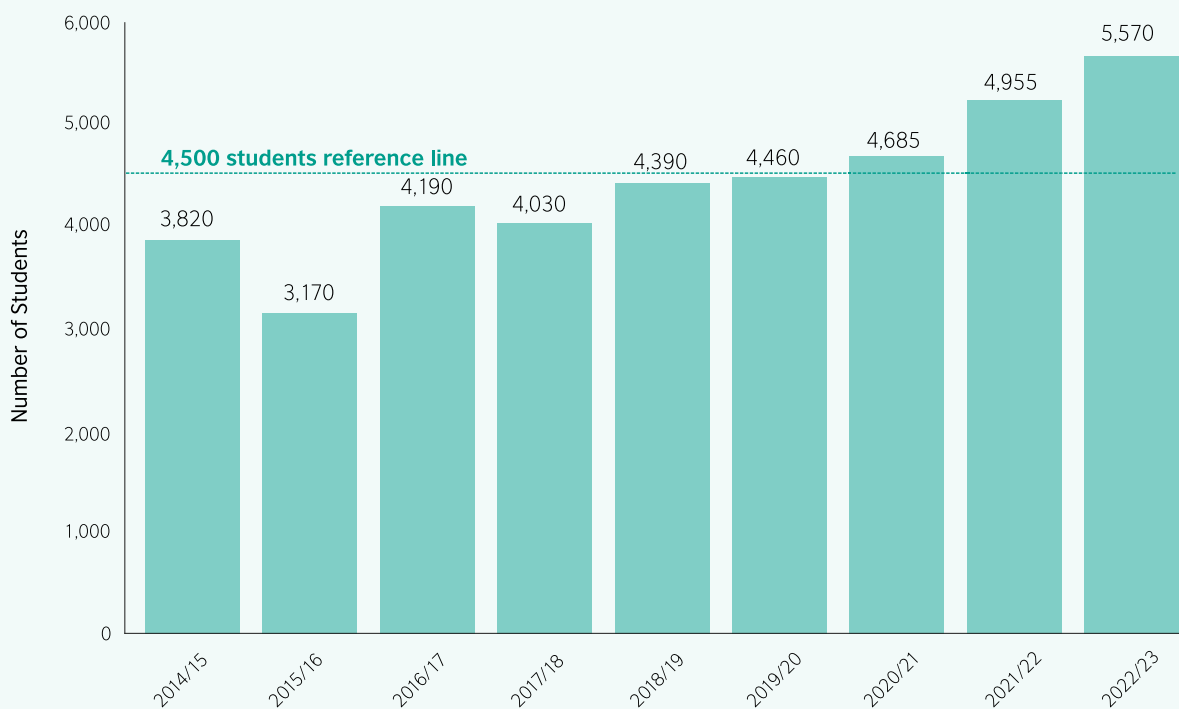


Fig. 10, which presents data spanning the academic years from 2014/15 to 2022/23, illustrates an impressive 45% increase in the number of Spain degree-seeking students enrolled in TNE programmes in Spain. Notably, this growth persisted even in the aftermath of Brexit in 2020. The data suggests that Brexit has not negatively impacted the steady upward

trend observed since 2017/18. This sustained increase reflects the enduring appeal of UK universities to Spanish and foreign nationals in Spain seeking TNE opportunities, likely driven by the global reputation of British higher education institutions and the continued alignment of academic offerings with the needs of international students.

Figure 10. Evolution of TNE students in UK programmes in Spain



Source: Higher Education Statistics Agency (HESA).

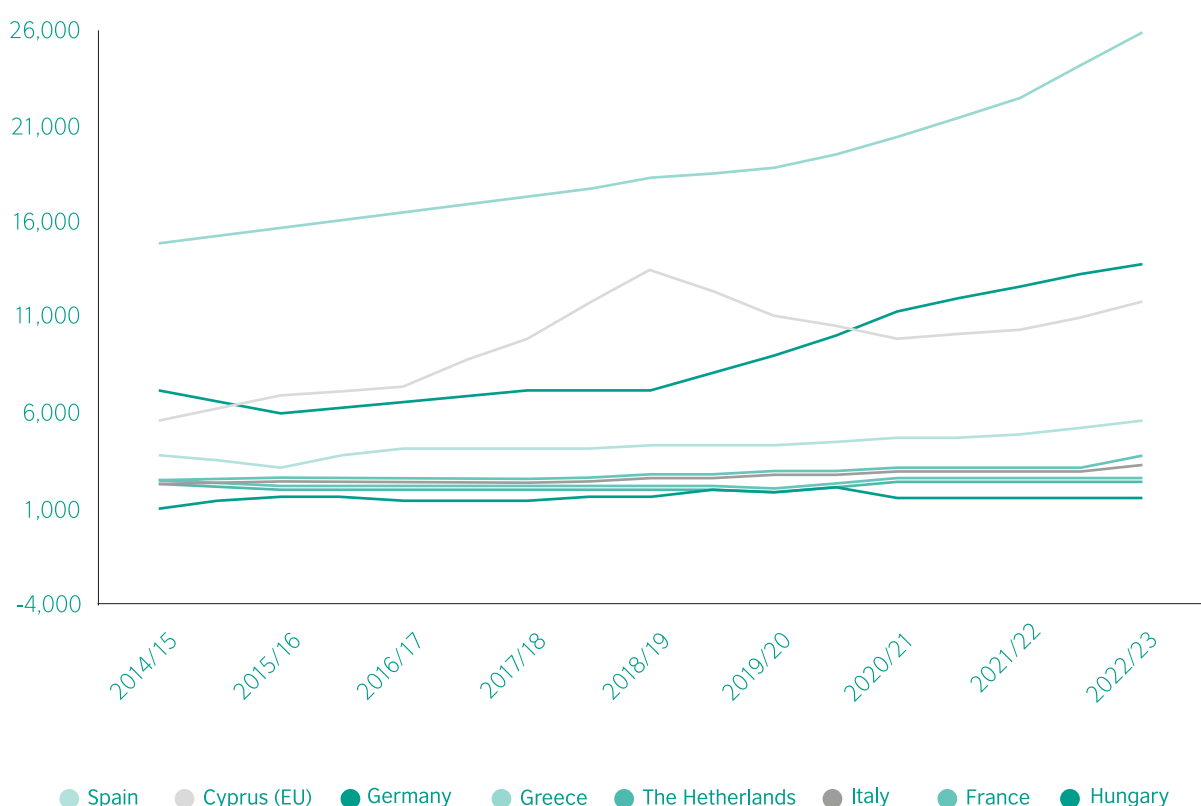
Fig. 11 shows the evolution of TNE enrolment in various countries in Europe. The positive trends have been led by Greece and Germany, with an irregular but relevant increase in Cyprus, Spain being the fourth country among the ones considered in this study. These figures may suggest that some of the strategies implemented by UK universities in Germany or Greece could be applied as well for Spain since there is sufficient room for improvement given the relatively low number of current TNE initiatives in the country.

Since there is no available data on the subject distribution of UK transnational education (TNE) in Spain, the distribution across the EU and its evolution over the past few years can serve as a reasonable proxy (Fig. 11). The trends observed in the EU provide **valuable insights into the subject preferences of students engaged in UK** higher education programmes abroad, reflecting broader academic and employment market trends.

By analysing these figures, it is possible to infer the potential subject choices and growth patterns that might also be relevant to the Spanish context.

Over the last two academic years, certain subject areas have demonstrated notable changes in student enrolment. **Business and Management** remains the dominant field, continuing to attract the highest number of students, though its growth appears to have stabilised. **Engineering and Technology**, along with Computing, have shown steady increases, likely influenced by the rising demand for **digital and technical skills**. Meanwhile, subjects such as Education and Historical Studies have maintained relatively lower enrolment numbers, reflecting more niche demand. Overall, the distribution suggests that students are increasingly aligning their academic choices with **sectors experiencing strong professional demand**, a trend that is expected to persist in the coming years.

Figure 11. Evolution of TNE students in EU countries



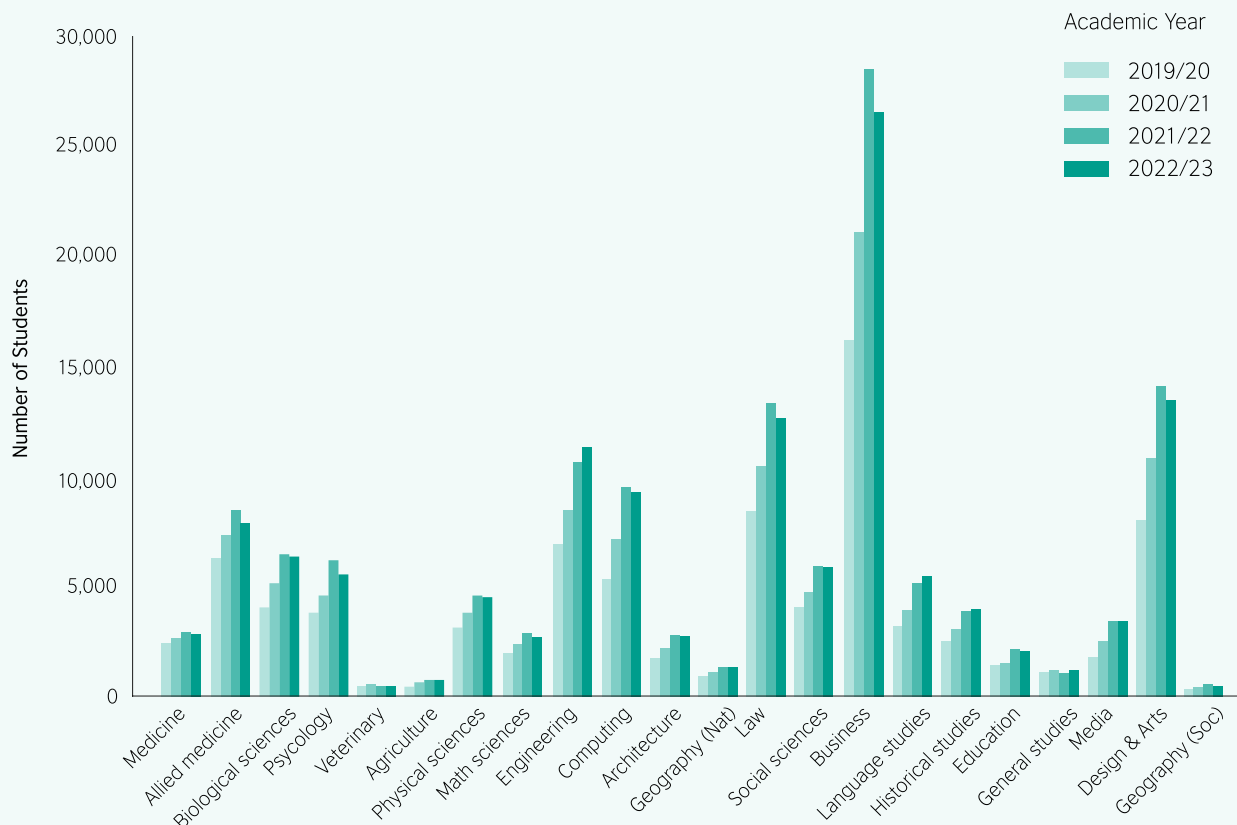
Source: Higher Education Statistics Agency (HESA).

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Figure 12. Distribution of UK TNE in the EU by subject area (2019 to 2023)



Source: Higher Education Statistics Agency (HESA).

vii) Outline mapping of TNE in Spain

A description is provided below on the mapping of UK transnational education in Spain. Locally supported and collaborative models are outlined and described including the participating institutions and the degrees involved in the academic offer. An introduction on the international branch campuses is also included, although there are currently no UK institutions directly involved.

International branch campuses in Spain

There is no current UK branch campus in Spain, being all the cases run by American universities. International Branch campuses operating currently in Spain (authorised by the Spanish Ministry of Science, Education and Universities) are the following:

- Saint Louis University Madrid. This American Jesuit university opened its Madrid campus in 1968. The campus offers undergraduate programmes in fields such as political science, international studies, and psychology. Students can complete their full degree in Spain or opt to study for part of their degree in Madrid before transferring to the main campus in St. Louis, Missouri, USA.
- Schiller International University. Schiller International University, with its Madrid campus, provides an American-based education model allowing students to switch between its European and U.S. campuses. Key programmes include International Relations and Business Administration.
- The American College in Spain (ACS). The first American-style higher education institution established in Marbella. The college offers a two-year foundation, similar to the U.S. Community College system, after which students may transfer to universities in the U.S. or other European locations to complete their degree.

Locally supported UK TNE mapping in Spain

The following table (Table 3) outlines the list of authorised centres teaching British programmes in Spain, which belongs to the locally supported models as described in Table 1. These institutions followed the authorisation procedure as described in section v of this document. Aside from the list below, there are other three agreements in place currently undergoing the authorisation process in Barcelona, Málaga, Valencia and Madrid.



Table 3. Authorised centres teaching UK programmes in Spain (locally supported models)

Authorised institution in Spain	UK Institution	Authorised Degrees
CESINE Universidad. Santander	London Metropolitan University	<ul style="list-style-type: none"> • BSc (Hons) in Advertising, Marketing Communications and Public Relations • BSc (Hons) in International Business Management • BSc (Hons) in Journalism
European College. EC Business School. Barcelona	University of Derby	<ul style="list-style-type: none"> • Bachelor (Hon.) in Business Management
EADE (Escuela Autónoma de Dirección de Empresas). Marbella	University of Wales Trinity Saint David	<ul style="list-style-type: none"> • BA (Hons) in Business Management • BA (Hons) in Physical Education • MA in Physical Education, Sport and Physical literacy • MA Visual Communication • MA Business Administration MBA • BSc (Hons) Sport and Exercise Science • BA (Hons) Animation and VFX • BA (Hons) Computer Games Design • BA (Hons) Hospitality and Hotel Management
CESTE Centro Universitario. Zaragoza	University of Wales Trinity Saint David	<ul style="list-style-type: none"> • Bachelor in Applied Computing. Big data • Bachelor in Business Management. Comercio Internacional • Bachelor in Applied Computing. Cloud • Bachelor in Applied Computing. Ciberseguridad • Bachelor in Applied Computing. Redes • Bachelor in Business Management. Marketing Digital • Bachelor in Business Management. Finanzas • Bachelor in Business Management. Emprendimiento • Bachelor in Business Management. Logística y Cadena de Suministro • MA in Banking and Finance • MA in Business Administration MBA • MSc Computer Networks and Security • MSc Financial Management • MSc Communication Technology

Collaborative TNE mapping in Spain

Table 4 includes a mapping of the collaborative TNE initiatives between UK universities and the Spanish counterparts. A description of the participating institutions together with the associated joint/double

degrees is also provided. Most of the initiatives included in this Table have been developed in the last few years.

Table 4. Joint/double degrees between Spanish and UK universities in Spain (collaborative models)

Spanish university	UK Institution	Joint/Double Degrees
CUNEF Universidad	London School of Economics and Political Science	Grado + LSE General Course Programme Certificate (not double or joint degree)
IE University	King's College London	Bachelor of Laws + King's College Masters' of Law LLM
Universidad de Deusto	Roehampton University, London, UK	Erasmus Mundus Master's Programme in Human Rights Policy and Practice
	University of Bradford	European and International Business Management
Universidad de Granada	University of York	Erasmus Mundus Master in Women and Genre Studies
	University of Sheffield	Erasmus Mundus Master in Excellence in Public Health
Universidad de Jaén	University of Hull	Grado en Administración y Dirección de Empresas (GADE) Bachelor in Business
	Edge Hill University	Grado en Administración y Dirección de Empresas (GADE) Accounting and Finance
Universidad de las Palmas de Gran Canaria	University of Birmingham	<ul style="list-style-type: none"> Grado en Administración y Dirección de Empresas, ULPGC + Marketing with Events Management BA (Hons) Grado en Administración y Dirección de Empresas, ULPGC + Business Enterprise BA (Hons) Grado en Administración y Dirección de Empresas, ULPGC + Digital Marketing BA (Hons) Grado en Administración y Dirección de Empresas, ULPGC + Marketing Management BA (Hons) Grado en Turismo, ULPGC + International Tourism Business Management BA (Hons) Grado en Turismo, ULPGC + Digital Marketing BA (Hons) Grado en Turismo, ULPGC + Marketing Management BA (Hons) Grado en Turismo, ULPGC + Marketing with Events Management BA (Hons) Grado en Turismo, ULPGC + International Hospitality and Tourism Management BA (Hons) Grado en Turismo, ULPGC + Aviation and Airport Management BA (Hons)

Spanish university	UK Institution	Joint/Double Degrees
Universidad de Oviedo	Staffordshire University	Grado en Ingeniería Electrónica Industrial y Automática o Grado en Ingeniería Eléctrica + Staffordshire University bachelor degree
Universidad de Sevilla	Cranfield University	<ul style="list-style-type: none"> MA/MSc en Ingeniería Industrial + MA/MSc of Science MA/MSc en Ingeniería de Telecomunicación + MA/MSc of Science MA/MSc en Ingeniería de Caminos, Canales y Puertos y MA/MSc of Science
Universidad Politécnica de Cartagena	Edinburgh Napier University	<ul style="list-style-type: none"> Grado Arquitectura e Ingeniería de la Edificación + BA in Architectural Technology Grado en Ingeniería de Telecomunicación + BEng Electrical and Electronic Engineering Grado en Ingeniería Industrial + BEng Mechanical Engineering Grado en Ingeniería Civil +BEng in Civil Engineering
Universidad Politécnica de Madrid	Cranfield University	<ul style="list-style-type: none"> MA/MSc en Ingeniería de Producción (UPM) + Global Product Development and Management MSc MA/MSc en Ingeniería Electromecánica (UPM) + Manufacturing Technologies and Management MSc MA/MSc en Ingeniería en Diseño Industrial (UPM) + MA/MSc of Design MDes Double MA degree in Food Chain Systems Double MA degree in Future Food Sustainability Double MA degree in Environmental Engineering Double MA degree in Environmental Management for Business Double MA degree in Land Reclamation and Restoration Double MA degree in Atmospheric Emission Technology Double MA in Agronomy
Universitat Politècnica de Catalunya	Cranfield University	MA/MSc in Applied Telecommunications Engineering and Management (MASTEAM) + 7 ICT masters in Cranfield University
Universidad Pontificia de Comillas	Lancaster University	Double BA degree in Business Administration
	University of Strathclyde Glasgow	<ul style="list-style-type: none"> Official MA/MSc in Telecommunications Engineering and MA/MSc in Smart Grids MA/MSc en Ingeniería Industrial y MA/MSc in Smart Grids

Spanish university	UK Institution	Joint/Double Degrees
Universitat Autònoma de Barcelona	University of St. Andrews	PhD in Social and Juridical Sciences
	University of Glasgow	Erasmus Mundus MA/MSc in Education Policies for Global Development
	University of Hertfordshire	MA/MSc in Pharmacovigilance and Pharmacoepidemiology
	University of Glasgow	Erasmus Mundus MA/MSc in Children's Literature, Media and Culture
Universitat de València	Nottingham Trent University	<ul style="list-style-type: none"> • BA in International Business (with Spanish) • Graduado en International Business + Bachelor of Arts (Hons) in International Business
	University of Hertfordshire	Graduado en International Business + Bachelor of Arts (Hons) in International Management
Universitat Internacional de Catalunya	Birkbeck University of London	Bachelor's Degree in Business Administration (Spanish Programme) + BSc in Financial Economics
	Swansea University	Double MA/MSc of Science degree in Computational Mechanics field
Universitat Politècnica de València	Cranfield University	<ul style="list-style-type: none"> • Double BA degree in Biotechnology • Double BA degree in Food Technology • Double BA degree in Agri Food Engineering • Double BA degree in Forestry and Natural Environment Engineering
Universitat Pompeu Fabra	King's College London	Bachelor in Law + Grado en Derecho

Source: the authors

viii) Benchmark analysis. Success UK TNE cases in Spain

This section analyses the application of Transnational Education (TNE) principles through two distinct case studies, both exemplifying successful British–Spanish academic partnerships. The first case highlights the dual (in collaboration with a company) and double (an internationally double degree) Master of Science programme offered by the University of Strathclyde in the UK and Universidad Pontificia Comillas in Spain. This initiative, driven by strong industry collaboration with the Spanish energy utility company Iberdrola, integrates academic learning with real-world experience, showcasing the value of industry-supported TNE models.

The second case study focuses on a locally supported franchise model, established between EADE Business School, an authorised institution in Spain, and the University of Wales Trinity Saint David. This model demonstrates how locally embedded TNE initiatives can expand British university outreach while fostering academic excellence abroad. Together, these case studies present two distinct but equally successful approaches to TNE in Spain. They serve as benchmarks for other British and Spanish institutions aiming to develop impactful transnational education partnerships.

Case Study: Transnational Education (TNE) Initiative in Smart Grids – A Triangular Collaboration Model

Antecedents

The Master's in Smart Grids, a collaborative programme (double and industry-academia dual degree) between Universidad Pontificia Comillas in Spain and the University of Strathclyde in the United Kingdom, supported by the Spanish multinational utility company Iberdrola and other key industry players, exemplifies a successful triangular cooperation model. It unites academia, industry, and international collaboration to address the increasing demand for professionals skilled in digital power networks and renewable energy integration. This case offers valuable insights into how strategic TNE models can meet global industry needs while creating lasting academic partnerships.

The origins of this collaboration stem from Iberdrola's significant operations in the UK through its subsidiary, Scottish Power, which provided a natural link between Universidad de Comillas and the University of Strathclyde. Iberdrola, recognising a critical skills gap in electrical engineering and ICT integration, initiated the programme to produce cross-disciplinary professionals. Miguel Ángel Sánchez Fornié, former Global Director of Smart Grids at Iberdrola, highlighted the need for engineers with expertise in both fields, noting how telecommunications and electrical engineers often lacked complementary knowledge. This industry-driven motivation underscores the vital role of private-sector leadership in shaping TNE models that address real-world challenges.

Master structure

The Master in Smart Grids is a 90 ECTS programme taught entirely in English, blending academic theory with practical industry experience. The curriculum is structured across three phases: students complete 30 ECTS at Universidad Pontificia de Comillas in Madrid, 30 ECTS at the University of Strathclyde in Glasgow, and a further 30 ECTS through an industry placement with Iberdrola or one of its partner companies. The programme culminates in a final dissertation, integrating academic learning with practical project experience. Upon completion, students earn dual qualifications: a Master's from Universidad de Comillas and an MSc from the University of Strathclyde, opening pathways for further doctoral studies. The dual-degree model adds significant value to its students by providing two highly recognised qualifications and enhancing academic and professional mobility.

Join us on 6 Nov 2024 Postgraduate Open Day

MSc

Smart Grids with the Comillas Pontifical University, Madrid

Apply

Why this course? Course content Entry requirements Fees & funding Careers Apply Contact us

Key facts

- 📅 **Start date:** September
- 📅 **Study mode and duration:** 12 months full-time

Study with us

- double degree in partnership with the ICAI School of Engineering at the [Comillas Pontifical University](#), Madrid and in collaboration with Iberdrola, Minsait/Indra, Gridspertise and UFD Distribucion Electricidad S.A.
- paid industrial internships available in the UK and Spain
- build the skill set to meet the needs of the power sector

Industry connection

A defining feature of the programme is its mandatory industry placement, which directly engages students with real-world projects. This hands-on learning approach integrates students into industry workflows, fostering a deep understanding of practical challenges and solutions. The programme has demonstrated outstanding employability outcomes, with nearly 100% of graduates securing employment shortly after completing their studies. Graduates are in high demand from leading firms, including grid operators, manufacturers, and consulting firms, with many receiving multiple job offers due to their specialised expertise. This success highlights the importance of industry-aligned curricula and hands-on learning opportunities in TNE models.

Lessons learned

Despite its success, the programme has encountered several challenges that offer valuable lessons for future UK–Spain TNE initiatives. One significant issue has been the limited participation of British students, largely due to high domestic tuition costs, which discourage enrolment in international programmes. Additionally, the high cost of tuition for non-UK students has created a barrier, limiting accessibility for third-country students. Another concern has been the declining number of female students enrolling in the programme, pointing to the need for targeted outreach initiatives to promote gender diversity.

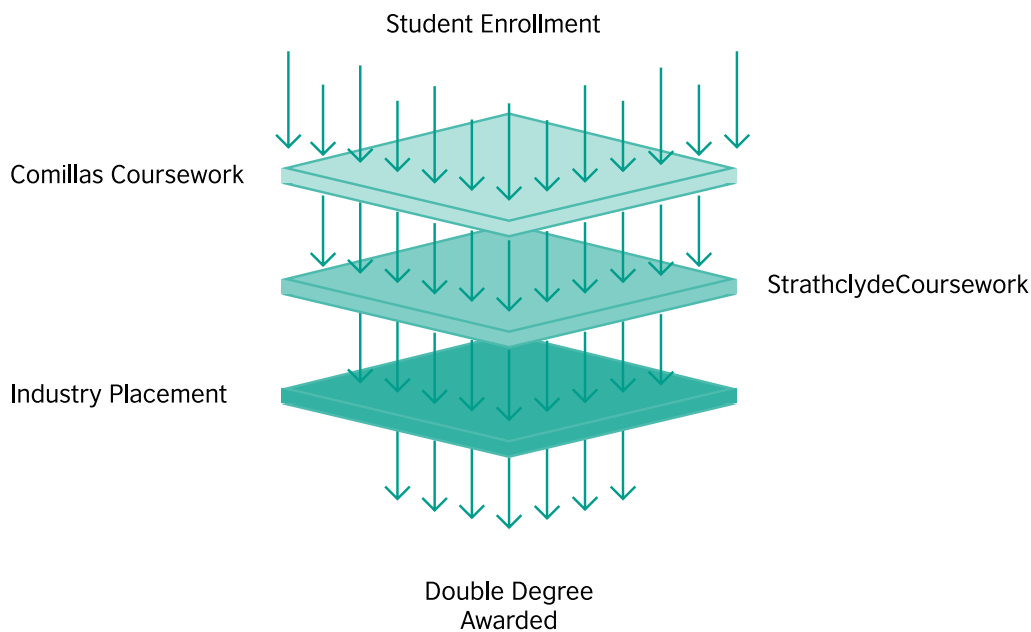
The triangular cooperation model of this TNE initiative presents considerable potential for replication and scaling across different academic disciplines and student

markets. Expanding the programme to include new areas such as renewable energy management, artificial intelligence, and data analytics could address emerging global skill demands. Additionally, adapting the dual-degree structure to undergraduate programmes could enhance early-stage academic mobility and broaden the reach of TNE initiatives. There is also significant potential for attracting third-country students, particularly from Latin America, Africa, and Asia, leveraging on Spain's global ties and cultural connections. Increasing collaboration with multinational companies to co-design curricula and provide industry placements would further align academic offerings with labour market needs.

Conclusions

The Master's in Smart Grids stands as a model of successful TNE cooperation, demonstrating how partnerships between UK and Spanish higher education institutions, together with the private sector can deliver global impact. The programme's success, driven by international double and dual-degree offerings, industry integration, and high employability outcomes, underscores the potential of triangular cooperation in TNE ventures. For British universities, this case highlights Spain's untapped potential as a prime destination for future TNE models, combining underdeveloped market opportunities with strong academic and industry partnerships. Acting on these opportunities could provide British institutions with a first-mover advantage, fostering sustainable partnerships and creating long-term global impact. This case sets a valuable precedent for future TNE initiatives, demonstrating how cross-border academic collaboration can drive innovation, address industry needs, and expand international influence.

Figure 13. Structure of the double degree



Case Study: Transnational Education (TNE) Collaboration between EADE Business School and University of Wales Trinity Saint David. Locally supported, franchise model

Antecedents

The collaboration between EADE Business School (founded by Miguel Martos, its current owner, in 1991) in Málaga and the University of Wales Trinity Saint David (UWTSD) is one of the longest-standing transnational education (TNE) initiatives in Spain. The partnership originated in 1993 through an unexpected chain of events. A newspaper advertisement led to a widespread publication across Andalucía, drawing the attention of stakeholders interested in British higher education models. This event catalysed contact between EADE's leadership and Fundación San Valero in Zaragoza, which had previously established a collaboration with a British university. The connection facilitated discussions with the University of Wales, laying the groundwork for the first transnational degree programme in **Business Administration and Management**.

Since its inception, the collaboration has evolved significantly. Initially, the programmes were validated under a British university's framework while adapting to Spanish higher education regulations. Over time, the regulatory landscape changed, prompting EADE to fully align its offerings with the **British TNE franchise model**

under the leadership of EADE's secretary general **Gabriel Arrabal**. This transition has allowed EADE to maintain its academic integrity while navigating Spain's higher education policies.

Advantages and Drivers of the Collaboration with Wales University Saint David

The partnership between EADE and UWTSD benefits from several **key drivers**, making it a **compelling model** for TNE expansion in Spain. First and foremost, the collaboration provides **access to a British-accredited degree** while allowing students to remain in Spain. This offers significant **cost advantages** over relocating to the UK while still providing an internationally recognised qualification.

Another major advantage is the **quality assurance mechanisms** embedded within the University of Wales Trinity Saint David's framework. EADE is subject to rigorous **academic validation processes**, ensuring that assessment methods, course content, and teaching standards are aligned with those in the UK. This structured oversight is highly beneficial for students, as it guarantees compliance with **British higher education standards** while also adhering to Spanish regulatory requirements.

A third driver of success is **the strong local and international reputation** of both institutions. EADE has built a solid presence in Málaga and attracts students from across Spain and abroad. At the same time, UWTSD provides an internationally established academic brand that enhances the **competitiveness**

and employability of graduates. This mutual reinforcement strengthens the credibility of the collaboration and ensures sustained student demand.

Student Composition

The student body at EADE reflects a diverse mix of local and international learners. The majority of students are **from Málaga and other cities in Spain**, particularly those seeking an **alternative to traditional HE**. Many students opt for the programme because it offers a **practical, career-oriented approach** with strong industry connections.

In addition to Spanish students, EADE has seen a **steady increase in international enrolments**. While the majority come from **Spain and EU countries**, a growing number are arriving from **Latin America, North Africa, and Asia**. The bilingual nature of the programme, which incorporates English-language instruction alongside Spanish-language support, makes it **highly accessible to international students**. Moreover, the British **higher education model** is particularly attractive to students looking for **shorter, more structured degree programmes** compared to traditional Spanish degrees.

Authorisation System

Spain's legal framework for **foreign higher education institutions** has evolved significantly since EADE first launched its collaboration with UWTSD. The **1991 Royal Decree 557/91** was the first piece of legislation that permitted foreign institutions to operate in Spain, provided they obtained **regional authorisation** from the local government. EADE was an early adopter of this process, making it one of the **first authorised British higher education providers** in Spain.

However, in 2015, the **Royal Decree 420/2015** introduced new regulations requiring foreign institutions to deliver **programmes identical to those in the country of origin**. This meant that EADE had to transition from **four-year degrees (aligned with the Spanish system) to three-year degrees**, mirroring those offered in the UK. This shift required extensive administrative and structural changes but ultimately strengthened the institution's **TNE legitimacy**.

To comply with **Spanish and British accreditation requirements**, EADE follows a **dual regulatory system**. It is subject to initial authorisation and regular inspections **by the Andalusian regional government**, ensuring compliance with Spanish educational laws. Simultaneously, the University of Wales Trinity Saint David conducts **thorough academic quality reviews**, approving all curricula, assessments, and faculty qualifications. This **dual accreditation model** guarantees that students receive an education that is

both **legally recognised in the UK and academically validated in Spain**.

Fees and Economic Arrangements

One of the most attractive aspects of EADE's TNE model is its **affordable tuition fees compared to studying in the UK**. The cost of a degree programme at EADE typically ranges between **€7,000 and €8,000 per year**, significantly lower than tuition fees at UK universities, especially for international students.

The **financial model** behind the franchise arrangement involves a **fee-per-student structure**. EADE pays a **licensing fee to UWTSD** based on the number of enrolled students, ensuring the continued validation and oversight of its degrees. This fee is **fixed within the agreement** and, in some cases, includes **minimum student quotas**, requiring EADE to cover for a set number of students even if enrolments fluctuate.

Despite the financial commitments involved, the **economic viability of the programme remains strong** due to steady student demand and EADE's **cost-efficient operational structure**. The ability to offer **British degrees at competitive prices** ensures continued growth and sustainability in the TNE market.

Lessons learned

In terms of student trends, looking ahead, **the demand for British-accredited degrees** in Spain is expected to rise, especially in light of Brexit and the increasing cost of studying in the UK. More students are seeking **cost-effective alternatives** that provide the same level of academic recognition without the need to relocate. The **TNE franchise model** that EADE and UWTSD follow is particularly well-suited to addressing this demand, as it allows students to obtain a UK degree at a significantly lower cost, while enjoying the **high quality of life and affordability** that Spain offers.

Moreover, trends indicate that Spain is becoming a more attractive location for **third-country students** from Latin America, Africa, and Asia. These students view Spain as an opportunity **to acquire European education** while benefiting from the shared linguistic and cultural connections. EADE and UWTSD are well-positioned to capitalise on this growing interest by expanding their student recruitment efforts in international markets.

The future of the EADE–UWTSD collaboration looks promising, with significant potential for **expansion and diversification**. There are ongoing discussions about introducing **new programmes** in fields such as **digital business, AI, and sustainability**, reflecting emerging industry needs.

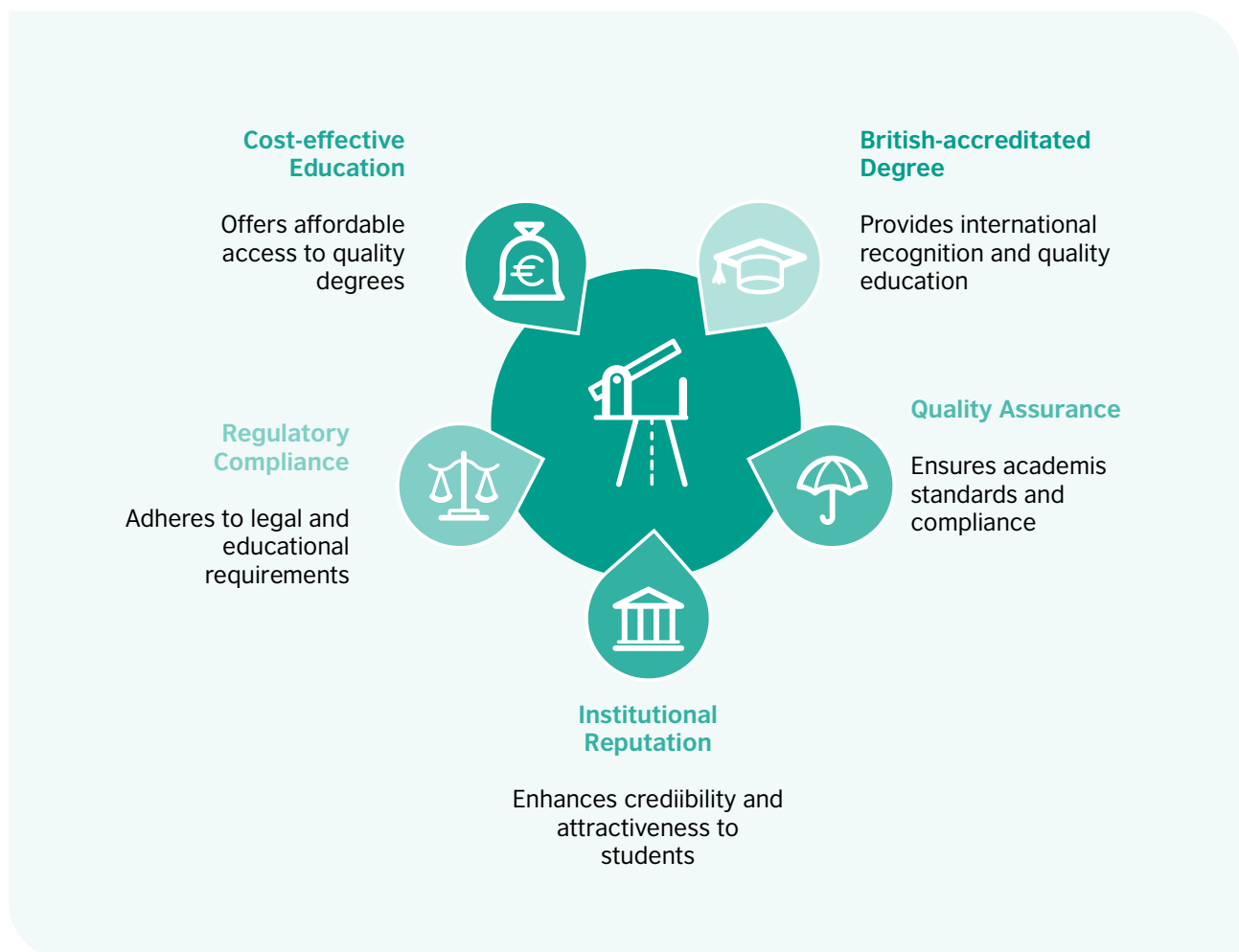
Additionally, EADE is considering **expanding its international outreach**, particularly targeting students from Latin America and Africa. The combination of Spain's **favourable living conditions, affordability, and bilingual education model** makes it an ideal destination for these students, who might otherwise choose the UK, the Netherlands, or Germany.

However, **regulatory challenges remain**. The bureaucratic requirements for operating foreign universities in Spain are still **complex and time-consuming**, with ongoing political and legal changes potentially impacting future operations. Nevertheless, EADE's **proactive approach** to compliance and its **early adaptation** to regulatory shifts suggest it is well-positioned to navigate these challenges.

Conclusion

The **TNE partnership between EADE and the University of Wales Trinity Saint David** stands as a **benchmark model for British higher education expansion in Spain**. By providing an internationally accredited UK degree in an affordable, high-quality learning environment, this collaboration successfully bridges academic, cultural, and economic divides. As demand for alternative pathways to British degrees continues to grow, this model serves as a **blueprint for future TNE initiatives**, offering insights into sustainable, high-quality, and internationally recognised higher education in Spain.

Figure 14. Factors affecting success of TNE models. EADE-UWTSD



ix) UK TNE in Spain. SWOT analysis

The two cases carried out above provide the clues to understanding the current nature and appeal, as well as the drawbacks identified in the Spanish HE sector as with regards to TNE with British universities. Drawing upon this analysis, a SWOT will be discussed in this section to better understand the future trends and evolution of the TNE cooperation between UK and Spain as well as the major challenges faced by TNE both for Spanish and for British institutions. Together with the **SWOT analysis**, a **CAME** (Correct, Adapt, Maintain and Explore) is developed for the corresponding weaknesses, threats, strengths and opportunities).

Spain represents a **significant opportunity for British Higher Education** (HE) institutions seeking to expand their Transnational Education (TNE) footprint (Fig. 15). Among its strengths, the high-quality standards in the British higher education system as well as its flexible education models make British TNE very appealing globally. Some specific features applicable to England, Wales and Northern Ireland, such as the shorter duration of Bachelor degrees, make British HE an appealing choice for TNE students in Spain. In addition, the UK's HE sector boasts a globally recognized and respected brand, with renowned institutions leveraging on their reputation to attract international students. This **strong brand recognition** adds a competitive advantage for UK HEIs in the Spanish market, where quality and prestige play a decisive role in student choices. Additionally, English-taught programmes provide a unique value proposition in Spain, catering to the increasing demand for international education and English language proficiency among Spanish and third countries students, offering a pathway to global markets and enhancing employability.

However, several weaknesses could hinder the successful establishment of UK HE institutions in Spain. Medium-sized and regional UK institutions face challenges related to marketing investment, as they must allocate significant resources to boost brand visibility and develop innovative programmes tailored to Spanish students. The Post-Brexit reality also poses increased barriers, such as a **more limited access to the UK job market for Spanish graduates or third country graduates**, potentially reducing the appeal of pursuing

UK-affiliated education. Furthermore, the high cost perception of UK HE offerings could deter Spanish students, particularly when compared to more affordable English-taught options in domestic or other EU institutions. Rigid enrolment systems for foreign HE students in Spain present yet another obstacle, potentially hindering the implementation of collaborative TNE UK programmes in Spain.

Opportunities do abound in the Spanish market for British HE institutions. Spain remains a relatively unsaturated market for new UK branch campuses and franchises, providing ample room for British HE institutions' **growth through value-adding differentiation to existing Spanish higher education offerings**. Additionally, third-country students who would have studied in the UK but are now constrained in mobility by post-Brexit immigration rules, could benefit from UK-accredited TNE offerings in Spain, maintaining their connection to British HEIs. **Flexible student enrolment policies** in UK institutions further enhance their appeal, supporting the establishment of franchise and branch campus models that could streamline the student experience while responding to aligning local educational needs.

Despite these opportunities, the Spanish TNE is not without its threats. EU funding and strategic alliances between Spanish and other continental European HE institutions add significant competition for UK HE institutions, as these partnerships often provide **cost-effective, high-quality education alternatives** with a direct access to the EU job market. **Ageing demographics** in Spain, though compensated by recent migratory influxes, may also signal a long-term decline trend in BA and MA enrolments, potentially limiting the student base for overly ambitious UK TNE initiatives. Moreover, competing transnational education initiatives from other leading English-speaking countries, such as the USA and Australia, offer diversified alternatives to UK efforts, leveraging similar English-taught offerings and global prestige to attract prospective Spanish students.

Maintain:

These strengths form a robust foundation for UK HEIs. Upholding high academic standards, enhancing global brand visibility, and reinforcing the distinctiveness of English-medium provision should remain strategic priorities. Continued investment in academic excellence and reputation management for UK institutions is vital to sustaining this competitive edge.

Correct:

These weaknesses necessitate strategic correction. UK HEIs should explore cost-sensitive models including flexible fee structured frameworks, together with blended delivery or modular pathways, to improve affordability and accessibility. Investment in locally relevant marketing strategies and stakeholder engagement can enhance brand recognition. Institutions might also work in partnership with Spanish authorities to advocate for more flexible enrolment systems and explore in-country employment opportunities to offset the limitations imposed by Brexit.

Explore:

These opportunities should be actively pursued. British HEIs might consider launching pilot franchise models or branch campuses in strategically selected Spanish regions. Targeting third-country students via UK-accredited offerings in Spain may allow institutions to maintain their global reach despite mobility challenges. Flexible, adaptive models aligned with local demand can ensure long-term viability and differentiation.

Adapt:

In response to these external threats, UK HEIs should remain agile and responsive. Building partnerships with Spanish and European institutions may offer shared access to EU initiatives and local networks. Expanding lifelong learning, postgraduate and executive education offerings may help mitigate demographic shifts. Finally, UK HEIs should strategically differentiate their provision from that of other Anglophone competitors through curricula innovation, regional specialisation, financially adapted business models and enhanced employability pathways.

By addressing these weaknesses and mitigating threats, UK HE institutions can capitalise on Spain's TNE growth

potential, while maintaining a competitive edge in this dynamic market.

Figure 15. SWOT analysis of UK transnational education in Spain

Strengths

1. Strong UK HE brand recognition (e.g. Russell Group)
2. English taught programmes attract global students
3. Flexible academic structures with 3/y bachelors in England, Wales and N. Ireland

Weaknesses

1. Marketing investment needed for visibility
2. Post-Brexit barriers to job market
3. High-cost perception of UK HE
4. Rigid enrolment policies in Spain

Opportunities

1. Non-saturated Spanish market for UK branches
2. Opportunities for third-countries students in TNE programmes in Spain
3. Flexible enrolment attracts students to franchises

Threats

1. EU funding increase legal competition
2. Aging demographics reduce enrolments
3. Competition from USA and Australia HE initiatives

x) Assessing potential of TNE options in Spain

Fig. 16 summarizes prospective family and students' UK study choice decision-making patterns, offering an insight into how UK universities can create guidelines to address their preferential student targets. A clear distinction is made between UK-Based and TNE models, with the former model offering strong immersive experiences to students, though requiring higher economic investments for students and their families in these educational formats. On the other hand, UK TNE models offer a compelling alternative to the immersive quality of mainland campuses, by democratizing access to both fulltime and part time students to what is generally considered as a highly reputable education system which has traditionally been regarded as a gateway to opportunities in a broader global job market.

Understanding the HE Models

The diagram distinguishes between UK-based mainland campuses and overseas TNE models, including online programmes, joint degrees, branch campuses, and franchises. It uses the HESA nomenclature to facilitate comparison with official statistics¹. A mainland campus in the UK provides a fully immersive cultural and educational experience, which remains a unique selling point. In contrast, TNE models are designed to overcome geographic, financial, and logistical barriers, offering more accessible options to a broader range of students.

Student Demographics and Motivations for Choosing TNE Models

The choice of a transnational education (TNE) model is deeply influenced by students' financial means, personal circumstances, and educational priorities. Students from higher-income families are more likely to enrol at UK-based campuses, attracted by the prestige of an in-person UK degree, access to global job markets, and the immersive academic and cultural experience such campuses provide. For these students, the combination

of academic reputation, campus life, and professional networks justifies the higher cost of living and tuition fees associated with studying in the UK.

In contrast, TNE models offer more accessible alternatives, particularly appealing to students from mid-income backgrounds who may still aspire to a British degree but are constrained by budget or mobility. Online programmes are especially attractive to part-time students or working professionals who require flexibility and are motivated by affordability and the ability to balance work and study commitments. Joint and double degree programmes, typically delivered in partnership with local institutions, cater to students seeking enhanced employability and international exposure at a moderate cost. Branch campuses, which aim to replicate the UK academic environment in other countries, provide a middle ground—offering a more immersive experience than online learning without the full financial burden of relocating to the UK. Similarly, franchise models deliver UK curricula through local institutions at reduced cost, making them an appealing option for full-time students looking for recognised qualifications without leaving their home country.

Strategic Implications for HE Managers

For HE managers and policymakers, this diagram underscores the importance of tailoring promotion and marketing strategies to meet the diverse student needs. Institutions should thus leverage the unique strengths of their programme offerings to each model to maximise market penetration. For instance, focusing marketing efforts on the prestige and immersion offered by mainland campuses while simultaneously scaling TNE models to address cost and accessibility concerns can drive growth. Additionally, integrating joint degrees and branch campuses can bridge gaps for students seeking international exposure without the financial strain of relocation. This multidimensional approach can ensure that UK institutions remain competitive and relevant in the global education market, particularly in Spain.

¹ In: <https://www.hesa.ac.uk/news/08-08-2024/sb269-higher-education-student-statistics/location>. Fig 13. HE student enrolments based wholly overseas by location and type of provision.

Figure 16. TNE models. Student decision-making and proposed guidelines for UK institutions

H.E. MODELS	UK-BASED	TRANSNATIONAL			
	MAINLAND CAMPUS	DISTANCE, FLEXIBLE OR DISTRIBUTED LEARNING	OTHER ARRANGEMENT INCLUDING COLLABORATIVE PROVISION (JOINT PROGRAMME)	OVERSEAS CAMPUS OF REPORTING HE PROVIDER (BRANCH CAMPUS MODEL)	OVERSEAS ORGANISATION (FRANCHISE MODEL)
WHY Spanish students choose UK HE	IMMERSION	LOWER COST	INTERMEDIATE COST	LOWER COST	LOWER COST
		WORK/STUDY BALANCE	INCREASED JOB PREPAREDNESS	IMMERSION	
WHO Should UK HE institutions be targeting	HIGH INCOME	MID INCOME			
	FULL-TIME STUDENTS	PART-TIME STUDENTS	FULL-TIME STUDENTS		

xi) Implementing a TNE model in Spain. Operational steps and Financial model

A set of stages and steps to implement new TNE initiatives is described below. Three stages have been identified in the process, preparation and authorisation, operations design and daily management. Following the roadmap, a financial and business analysis on the TNE model is carried out, paying particular attention to return on investment thresholds together with break-even analysis for fees and overall incomes.

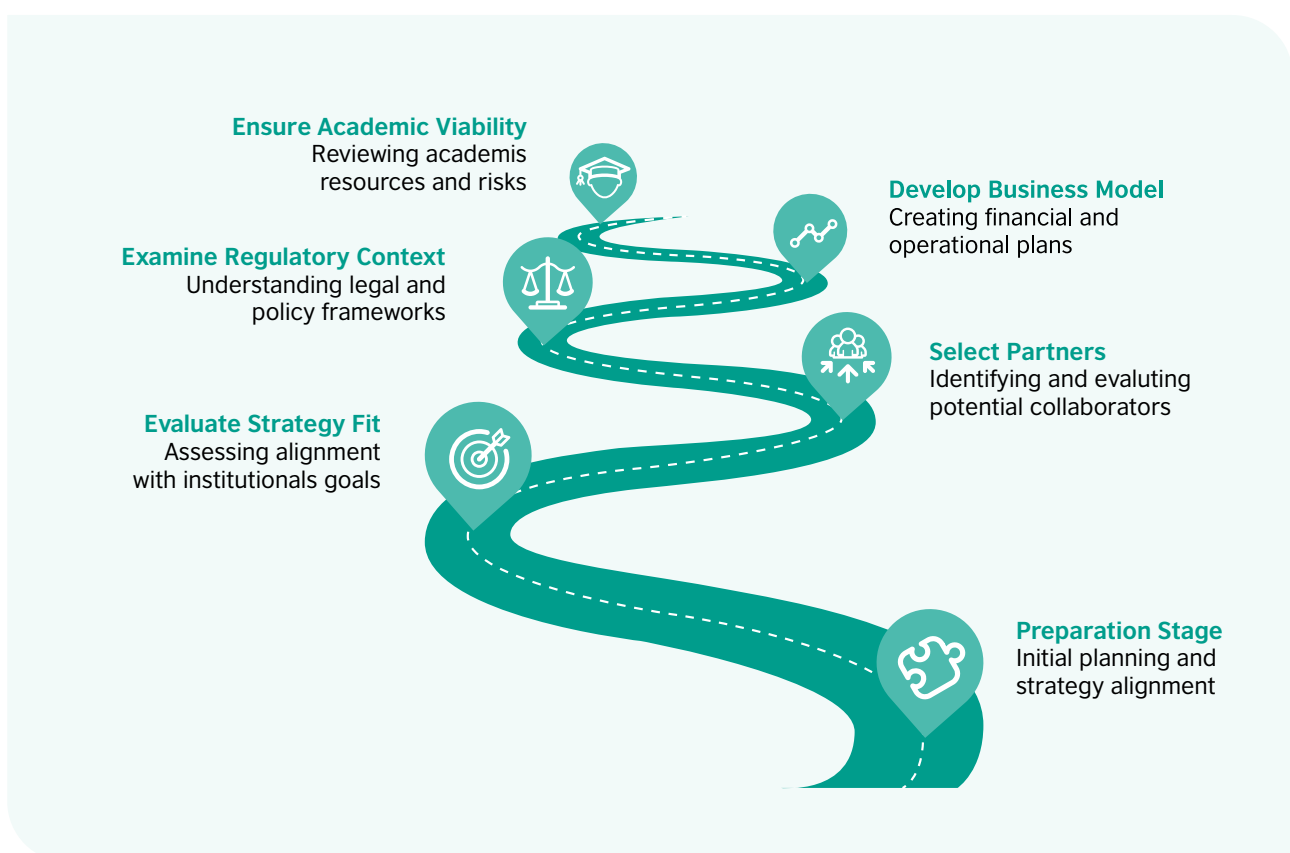
A. Preparation & authorisation stage

- **Evaluate strategy fit with the new initiative.** Assess the alignment of the proposed TNE initiative with the institution's broader internationalisation strategy. Define clear success metrics, identify key stakeholders and beneficiaries, and establish strategic objectives. Consider how the TNE model will enhance institutional reputation, academic offerings, and long-term global presence.
- **Select and assess potential partners.** Identify suitable Spanish institutions by evaluating their reputation, size, international orientation, and prior experience with TNE collaborations. Analyse their strategic alignment, stability of management teams, resource availability, and strengths within the higher education sector. Ensure compatibility in governance structures and future institutional objectives to mitigate potential strategic risks.
- **Examine the regulatory context.** Investigate the legal framework governing TNE partnerships within the relevant Spanish autonomous community. Consider regional higher education policies, government support, and regulatory approval processes. Recognise that British degrees issued under TNE agreements are not automatically recognised in Spain.
- **Develop a comprehensive business model.** Conduct a market analysis of prospective students, considering their demographic profile, academic background, and international versus domestic composition. Construct a detailed financial plan, including projected revenue streams, operating costs, profitability forecasts, cash flow analysis, and risk mitigation strategies to ensure financial sustainability.
- **Ensure academic viability.** Review the academic feasibility of the collaboration by assessing the partner institution's academic resources, faculty expertise, and organisational culture. Identify potential academic risks and establish mitigation strategies to maintain high-quality academic delivery and institutional coherence.
- **Authorisation process when applicable.** For autonomous and locally supported models (i.e. branch campus and franchise), it is obligatory to obtain authorisation from the regional authorities following the procedure described in section V of this report. The application for authorisation will be submitted by the local partner in case of a franchised agreement or by the UK university itself for branch campus. It must be addressed to the regional (autonomous community) authorities. The authorisation application will need a prior certification by the diplomatic representation of UK education authorities in Spain (British Council by delegated powers from British Embassy) to confirm that the British institution and qualifications are duly listed in the UK for higher education degree issuing.
- **Report by the Spanish Ministry of Foreign Affairs (for autonomous & locally supported models).** The above mentioned authorisation procedure needs a positive report by the Spanish Ministry of *Asuntos Exteriores, Unión Europea y Cooperación* regarding the installation of the foreign university through franchise or autonomous models in view of international treaties. This report is normally requested by the autonomous community (regional) government within the authorisation process. Once the authorisation is obtained, the centre (branch or franchise) should be listed in the RUCT. This is done by the Ministry but centres are recommended to check and request if not done automatically.

B. Operations Design

- **Define the academic programme.** Establish the syllabus structure, learning outcomes, and core academic objectives. Outline the division of responsibilities between the UK and Spanish institutions, ensuring a coherent curriculum that aligns with accreditation and quality assurance standards.
- **Plan academic staffing.** Identify programme leaders within both institutions and develop a clear strategy for staff recruitment, training, and ongoing professional development. Establish mechanisms for faculty collaboration, mobility, and joint academic initiatives to enhance teaching quality.
- **Develop assessment policies.** Design a structured approach to student evaluation, ensuring alignment between the UK and Spanish institutions. Clarify the roles of each partner in administering assessments and create coordination mechanisms to uphold academic integrity and comparability of standards.
- **Implement learning platforms and IT support.** Determine the digital infrastructure requirements, including virtual learning environments, student information systems, and IT support services. Identify gaps in technological resources and outline a plan for integration to facilitate seamless academic delivery.
- **Establish quality assurance mechanisms.** Define internal and external quality control processes, ensuring compliance with both UK and Spanish regulatory frameworks. Outline periodic reporting requirements, specify responsibilities for monitoring academic standards, and integrate regional legislation on quality assurance practices.
- **Design student support services.** Develop a structured plan for academic advising, career services, mental health support, and extracurricular engagement. Ensure that student welfare provisions align with both institutions' policies and cultural expectations.

Figure 17. Stages in the TNE development



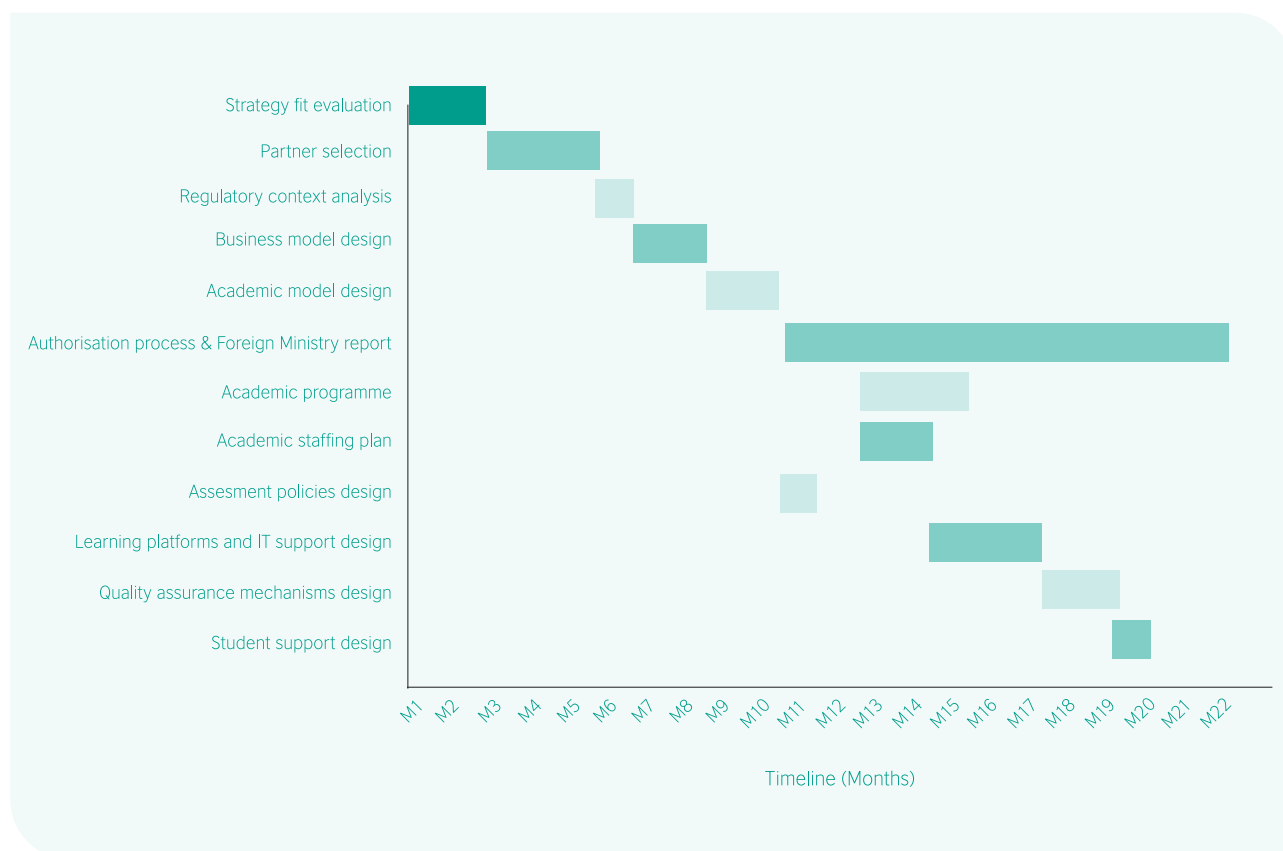
C. Day-to-day operations

- **Structure governance for the TNE model.** Implement a clear governance framework that defines decision-making processes, institutional responsibilities, and mechanisms for dispute resolution. Ensure that management structures reflect the strategic and operational needs of both institutions.
- **Oversee academic management.** Supervise curriculum implementation, faculty performance, and student progress monitoring. Develop processes for continuous improvement, curriculum review, and faculty collaboration to maintain academic excellence.
- **Manage business operations.** Administer financial planning, budgeting, and operational efficiency to ensure the long-term viability of the TNE initiative. Monitor revenue streams, cost control measures, and institutional investments to sustain financial health.
- **Conduct periodic quality reviews.** Adhere to the quality assurance requirements outlined by regional authorities in Spain. Schedule regular evaluations, collect stakeholder feedback, and implement necessary improvements to align with evolving regulatory and academic expectations.

Table 5. Stages, duration and agents involved

Stage	Step	Approx. duration (months, M)	Involved agent/institution
Preparation & authorisation	Strategy fit evaluation	2M	UK institution management
	Partner selection	3M	UK institution management
	Regulatory context analysis	1M	UK institution management/Spanish institution
	Business model design	2M	UK institution management/Spanish institution
	Academic model design	2M	UK institution management/Spanish institution
	Authorisation process & Foreign Affairs Ministry report	6-12M	Autonomous Community (region) Administration, UK administration (British Council)
Operations design	Academic programme	3M	UK and local institution
	Academic staffing plan	2M	UK and local institution
	Assessment policies design	1M	UK and local institution
	learning platforms and IT support design	3M	UK and local institution
	Quality assurance mechanisms design	2M	UK and local institution
	Student support design	1M	UK and local institution
Daily management	Structure governance	Continuous	UK and local institution
	Daily academic management	Continuous	UK and local institution
	Business operations management	Continuous	UK and local institution
	Periodic quality reviews	Continuous	UK and local institution

Figure 18. Gantt chart, TNE implementation



A financial and business model proposal for TNE franchised and branch campus models

Implementing a branch campus for a UK university in Spain involves significant initial investment and ongoing operational costs. Below is a comprehensive cost estimate and classification by cost type, followed by a breakdown of **annual costs**. These figures are **approximations** and would vary based on location (e.g., small, medium sized cities vs. large metropolitan areas), campus size, academic offerings, and partnership models. Initial costs may vary in Spain depending on the region and city size by more than 1/3 of the total cost. Due to lower transaction costs and a more intensive use of local resources and staff, implementation and operational costs for a Franchised campus would be up to 15-20% lower compared to the costs of a new branch campus. Furthermore, the following assumptions have been made while proceeding with the corresponding calculations:

- This model assumes a **medium-sized teaching-oriented campus** (600-1,000 students) with undergraduate and master's programs, not a research-intensive institution.

- Costs are expressed in euros and reflect **Spanish market conditions**.
- Staff costs reflect Spanish labor market salaries, with UK-quality academic staffing.
- Legal, authorisation and regulatory costs will vary depending on the structure (e.g., partnership with local institutions vs. fully independent campus).
- Depreciation assumes capital investment is made upfront and amortized evenly over time (20 yrs.).

Costs are assumed entirely by the corresponding British university for branch campus while set-up costs are normally assumed by the local institution, this means that **the actual implementation cost for the British university is just approximately 20% of the overall costs indicated in the table below in the case of franchised branches**.

Table 6. Capital investment, Franchised & branch campus

Item	Estimated investment (€)
Land Acquisition or long-time lease (optional, if not rented)	2M-5M
Construction/renovation of facilities (8,000-12,000 m2 campus)	10M-15M
Furniture & equipments (labs, classrooms, offices)	1.5-3M
IT infrastructure (servers, networks, LMS)	1M
Legal and regulatory setup, licences, authorisation	0.3-0.5M
Branding & marketing (Initial launch)	0.5-1M
Total initial investment	15.3-25.5M

Assuming a 20-year straight-line depreciation, this would result in: annual Depreciation: €765,000 – €1,275,000.

Table 7. Operating annual costs, Franchise & Branch campus

Category	Details	Estimated annual costs (€)
Human Resources	Academic staff (30 FTEs or equivalent in part time), Admin & Support (20 FTEs)	3M – 4.5M
Utilities	Electricity, water, heating/air conditioning...	200K – 300K
IT services	Software licenses, cloud services, LMS maintenance	250K – 400K
Personnel development	Training, conferences, recruitment	150K – 250K
Outsourced services	Security, cleaning, maintenance, legal, payroll	400K – 700K
Marketing and student recruitment	Digital marketing, fairs, local communication channels	300K – 500K
Depreciation costs	Based on Capital amortization	765K – 1.3M
Total		5.1M – 7.9M

Business model. Fee scenarios and break-even horizons

The abovementioned capital and cost structure should be balanced with the corresponding income structure

and will produce **different break-even points** and timelines that are shaped in Table 8.

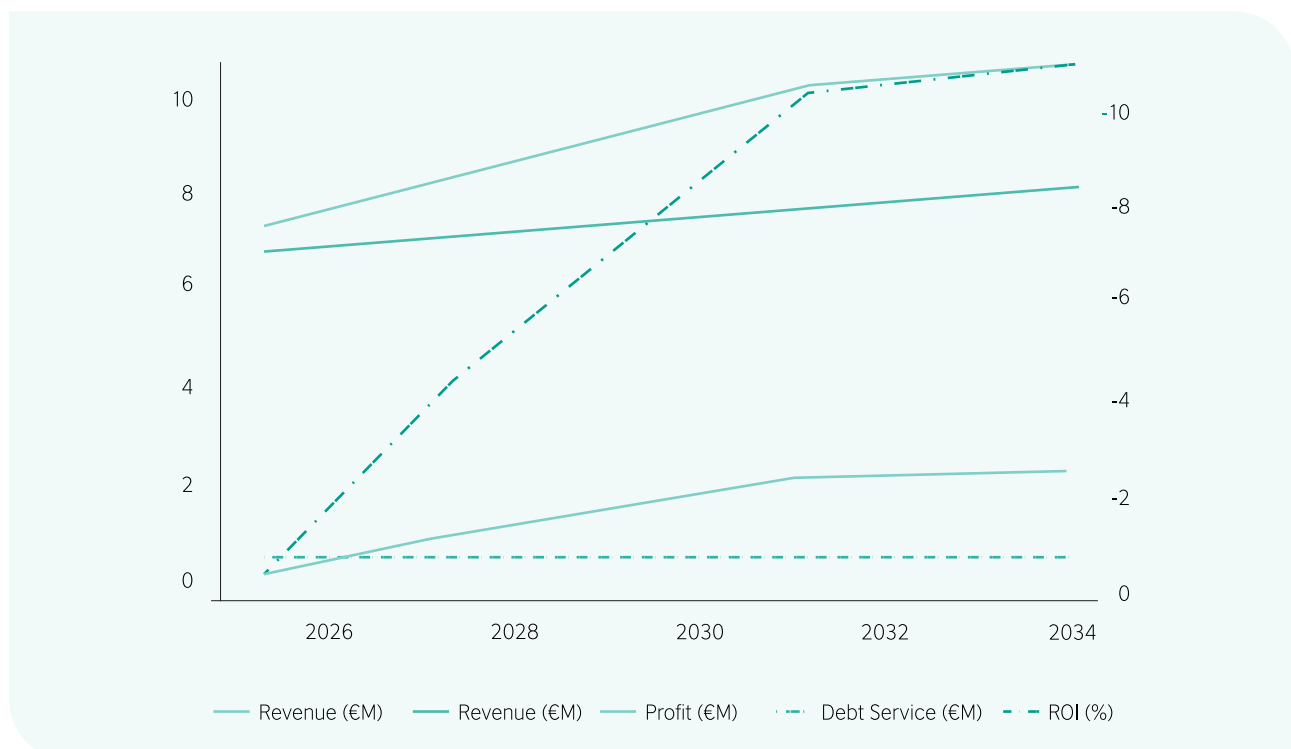
Table 8. Break even points and fee scenarios. Franchised and Branch campus models

Scenario	Tuition per student (euros)	Break-even enrolment
Low fee scenario	8,000 €/year	625-1,000 students
Medium fee scenario	10,000 €/year	500-800 students
High fee scenario	12,000 €/year	420-660 students

Fig. 19 represents the **economic scenario analysis** for a Franchised/Branch campus model. This scenario models student growth trajectory for a UK university branch or franchised campus in Spain. The initial enrolment is set at 700 students, with a projected annual growth rate of 5% during the first three years, reflecting an early expansion phase supported by strong recruitment efforts and market positioning. This is followed by a moderated growth rate of 3% per annum over the subsequent four years, corresponding to a phase of market consolidation and increased competition. In the final three years of the 10-year

projection period, student numbers are assumed to stabilise, with no further growth, indicating market saturation or strategic capacity limits. Tuition fees begin at €10,000 per student and are indexed annually with an assumed inflation rate of 2%, which also applies to operating costs. The base year operating expenditure is €6.5 million. The initial capital investment is estimated at €20 million, 50% of which is financed externally at an annual interest rate of 4%. The model includes an annual interest-only debt service of €0.4 million and tracks revenue, costs, profit, and return on investment (ROI) over the 2025–2034 period.

Figure 19. Economic scenario for an investment in TNE (branch/franchised models).



A financial and business model proposal for TNE joint degree bachelor

Table 9 shows the **cost breakdown for a joint degree model** including a four year structure in a 3+1 progression agreement, in which the 3 first years are taught in Spain and the last one in the UK. The cost breakdown presented is based on the delivery of a four-year joint bachelor's degree programme involving a Spanish and a UK university. The model assumes a single cohort of 40 students and 480 teaching hours per academic year. Personnel costs are set at €240 per hour when teaching is conducted in Spain and €380 per hour when delivered in the UK. These rates are applied per

cohort, not per student. IT support is budgeted at €250 per student annually, and internship management is estimated at €200 per student each year. Promotion costs are included only in the first year, with an allocation of €5,000 to support student recruitment and programme visibility. An indirect cost rate of 33% is applied to all direct costs—including personnel, IT, internship, and promotion—accounting for institutional overheads such as administration, infrastructure, and depreciation. All financial estimates are expressed in euros (€), and the model assumes no variation in student numbers or hourly costs across the four years.

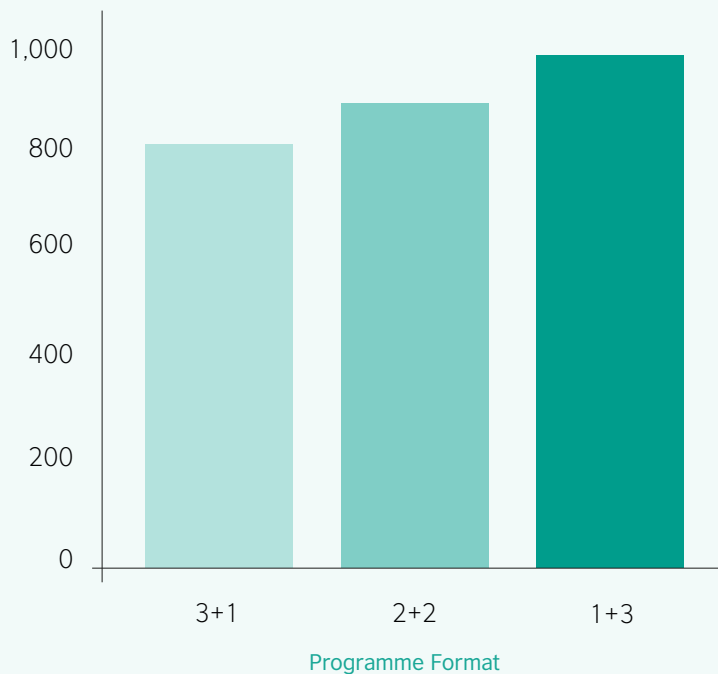
Table 9. Cost breakdown for a bachelor joint degree

Year	Teaching location	Personnel costs	IT costs	Promotion costs	Intern. management	Indirect costs	Total costs
Year 1	Spain	115,200	10,000	5,000	8,000	45,606	183,806
Year 2	Spain	115,200	10,000	-	8,000	43,956	177,156
Year 3	Spain	115,200	10,000	-	8,000	43,956	177,156
Year 4	UK	182,400	10,000	-	8,000	66,132	266,532
Total (€)		261,600	40,000	5,000	32,000	199,650	804,650

The bar chart (Fig. 20) below illustrates the total delivery costs, expressed in thousands of euros, for three joint degree programme **formats: 3+1, 2+2, and 1+3**. These formats refer to the distribution of study years between a Spanish and a UK university—for example, the 3+1 format consists of three years in Spain and one year in the UK. The chart clearly shows that the 3+1 format is the most financially efficient, due to the predominance of delivery in the lower-cost Spanish context. In contrast, the 1+3 format incurs the

highest overall cost, driven by the higher teaching rates associated with UK-based delivery over three years. The 2+2 model sits between these extremes, offering a more balanced cost profile. This cost structure is also subject to the different nature of the Spanish partner (public vs. private) which can also influence the revenue and cost funding schedule. Other models are also available, such as those with an overall duration of 3 years, which can be acceptable under certain circumstances according to the Spanish regulation.

Figure 20. Economic scenarios for an investment in TNE (Branch/Franchised models)



Taking into consideration all the data in the models above, the **break-even fee structure** for the three joint degree formats would be the following: the **3+1 model** requires a minimum fee of approximately **€5,029 per student-year**, benefiting from the lower teaching costs in Spain. The **2+2 model** needs around **€5,588 per**

student-year, reflecting a balanced delivery between both institutions. The **1+3 model**, with most teaching in the UK, demands the highest fee at approximately **€6,146 per student-year** to cover its higher cost structure.

xii) Conclusions. A TNE development roadmap for UK HE in Spain

Overall Conclusions

The findings of this report highlight Spain as an **emerging, attractive and largely untapped** market for British Transnational Education (TNE). Despite the strong global reputation of UK higher education, British TNE initiatives in Spain remain relatively underdeveloped compared to other European markets, presenting a clear first-mover advantage for UK institutions. Spain's growing international student population, relatively favourable higher education policies, and increasing adoption of English-medium instruction create a promising environment for British universities to expand their presence through TNE models.

Spain's demographic trends further reinforce its attractiveness as a TNE destination. The country has experienced sustained population growth, particularly driven by an influx of international students from Latin America, Asia, and Africa. These students are seeking globally recognised qualifications in a **culturally familiar and affordable setting**. Additionally, Spain's bilingual educational environment—offering both Spanish and English as mediums of instruction—provides a competitive advantage for institutions looking to attract international students seeking proficiency in both languages.

While Spain offers numerous opportunities for TNE expansion, the complexity of its regulatory landscape remains a key consideration. The country's higher education system is governed by both national and regional authorities, which means that navigating the authorisation and accreditation process for foreign institutions requires careful planning. Recent legislative changes, particularly the Organic Law on the University System (LOSU 2023), indicate a **growing commitment to internationalisation**, yet administrative complexities persist. UK universities must develop strong institutional and governmental partnerships to ensure compliance with Spanish regulations while leveraging available incentives for foreign education providers.

Collaboration between UK and Spanish universities represents **one of the most viable pathways for TNE**

expansion. The existence of joint and double degree programmes between institutions from both countries demonstrates the feasibility of such models. These partnerships can be further expanded, particularly in disciplines with high international demand such as business, engineering, healthcare, and digital education. Spanish universities also stand to benefit from UK partnerships by improving their global rankings, enhancing research collaborations, and increasing their international student base.

Economic considerations are also central to the development of TNE initiatives in Spain. The country's lower tuition fees and living costs, when compared to other major study destinations, make it an attractive alternative for students who may find UK-based education financially restrictive. UK institutions should implement pricing strategies that reflect local market conditions while maintaining the academic quality and prestige associated with UK degrees. Additionally, Spain's historical and cultural connections with Latin America and the North-Africa region provide British universities with an opportunity to attract students from Spanish-speaking regions who might be interested in pursuing UK-accredited qualifications.

TNE in Spain might arise as an alternative, after new barriers to international education emerged in the UK in the last few years. The post-Brexit regulatory environment has introduced pitfalls to student mobility, impacting traditional pathways for Spanish students, among others, to study in the UK. This shift makes **TNE models even more critical** as an alternative means of providing UK higher education to Spanish and international students. Additionally, evolving immigration policies in Spain and other European countries may further impact student recruitment and programme implementation, requiring UK institutions to adopt flexible and adaptive strategies.

To ensure the successful expansion of TNE in Spain, strategic recommendations have been developed for four key stakeholders: Spanish universities, UK universities, Spanish public administrations, and UK public administrations.

Strategic Recommendations

For UK HEIs

1. Establishing Clear TNE Pathways in Spain

UK HEIs are encouraged to develop well-defined TNE strategies tailored to Spain's higher education environment. This includes identifying suitable models such as joint degrees, franchises, or branch campuses based on market needs and regulatory requirements.

2. Adopting a Segmented Approach to Partnerships

UK universities should differentiate their TNE strategies based on the profile of Spanish institutions. Public universities may be more suited for joint and double degrees, while private institutions and authorised HE providers may provide better opportunities for franchise and locally supported models.

3. Capitalising on First-Mover Advantage

The relatively low penetration of UK TNE in Spain provides an opportunity for UK institutions to establish themselves before competition increases. Institutions should act swiftly to develop sustainable partnerships and innovative programme offerings.

4. Anticipating Trends in the Spanish TNE Market

UK institutions are expected to monitor changes in student preferences, regulatory developments, and market conditions to adapt their TNE strategies accordingly. Understanding the local landscape will help avoid potential obstacles while maximising opportunities for expansion.

5. Navigating Legal and Authorisation Pathways

British universities must work closely with Spanish regulators to ensure compliance with authorisation requirements in case of locally supported models. A thorough understanding of Spanish higher education laws will be critical to successfully implementing TNE initiatives.

For Spanish Universities

1. Enhancing Awareness of TNE and Its Strategic Value

Spanish universities should recognise TNE as a valuable component of their internationalisation strategy. While many institutions focus on student exchange and research collaborations, TNE presents an alternative pathway for expanding global engagement and institutional visibility.

2. Balancing TNE with Other Internationalisation Approaches

Institutions should assess the trade-offs between TNE and other internationalisation strategies, ensuring that TNE initiatives align with their broader academic and research objectives. While student mobility and partnerships remain essential, TNE provides an opportunity to diversify international engagement models.

3. Utilising TNE for Student Recruitment and Retention

Spanish universities can leverage TNE to attract both domestic and international students. Offering UK-accredited programmes through joint degrees or franchises can provide a competitive advantage, particularly as English-medium education gains popularity in Spain.

4. Exploring TNE as an Unexplored Revenue Stream

While many Spanish universities rely on traditional funding sources, TNE offers an additional revenue model that can enhance financial sustainability. By collaborating with UK institutions on degree programmes, universities can generate new income streams while improving their global standing.

For UK Public Administrations

1. Adopting a Flexible Approach to Quality Assurance

UK higher education regulators should maintain quality standards while allowing flexibility in the accreditation of TNE models. A balanced approach will ensure that UK universities can expand internationally without excessive bureaucratic barriers.

2. Providing Incentives for TNE Expansion

The UK government should offer financial and policy support to universities seeking to establish TNE initiatives abroad. Public-private grants, flexible funding mechanisms, and tax incentives could encourage more UK HEIs to explore opportunities in Spain.

3. Adjusting Fee Frameworks to Accommodate TNE Models

UK HEIs operating in Spain must align their tuition fee structures with local market conditions. A flexible approach to pricing will ensure affordability while maintaining the high perceived value of UK qualifications.

4. Encouraging Online, Blended, and Locally Supported TNE Models

UK HEIs should embrace a diverse range of TNE models, including online and blended learning options, which can improve accessibility for students while reducing operational costs for HEIs.

For Spanish Public Administrations

1. Recognising TNE as a Mutually Beneficial Strategy

Spanish authorities might view TNE as a key driver of higher education internationalisation, fostering mutual benefits for both Spanish institutions and their international partners.

2. Supporting TNE in Both Collaborative and Locally Supported Models

Public administrations may actively encourage and facilitate TNE development through policies that support both joint academic collaborations and locally implemented UK degree programmes through current authorisation models.

3. Improving Enrolment and Admissions Systems

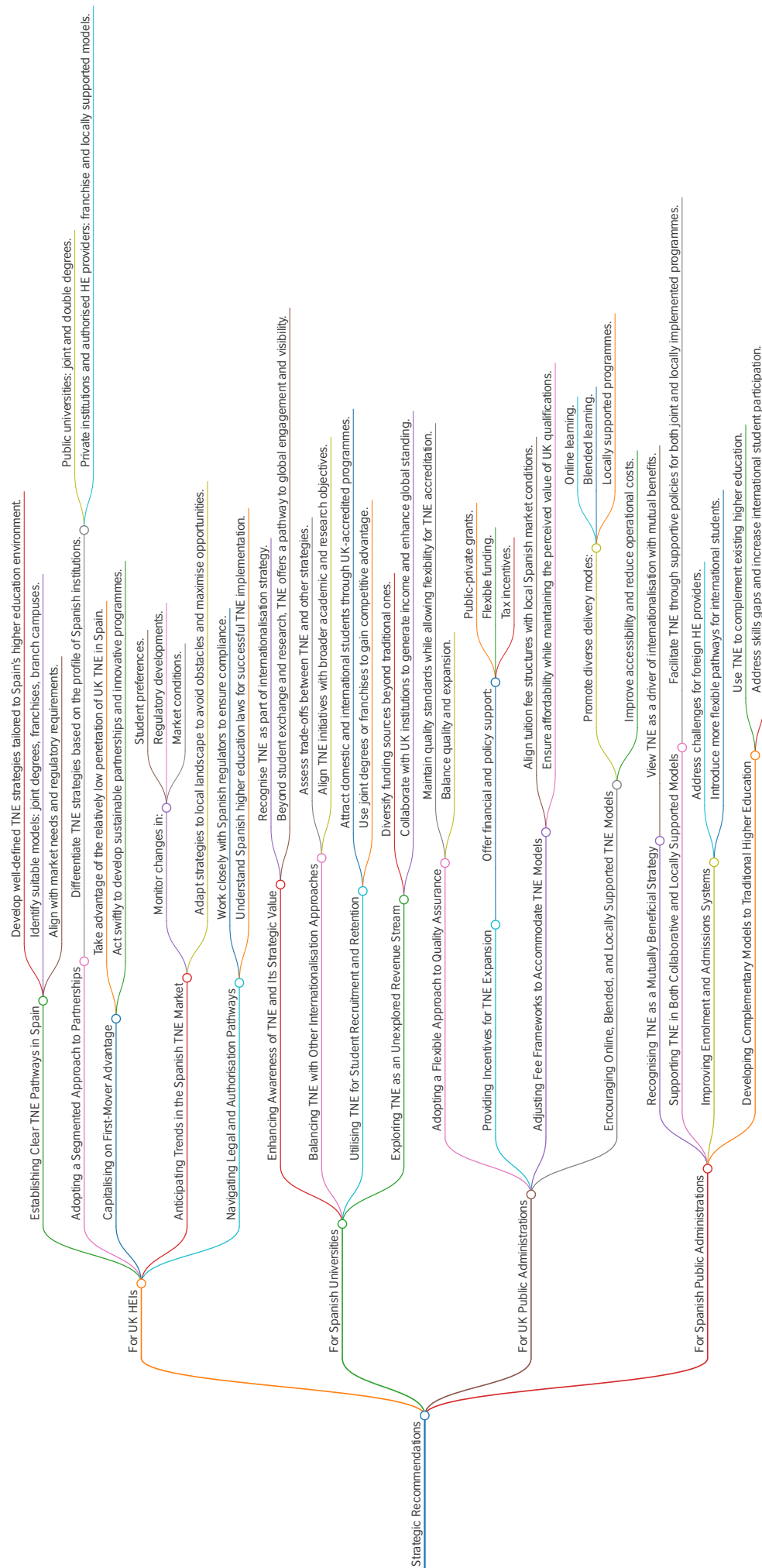
The current admissions system in Spain presents challenges for foreign higher education providers. Introducing more flexible enrolment pathways for international students will enhance Spain's attractiveness as a TNE destination.

4. Developing Complementary Models to Traditional Higher Education

Spanish policymakers should explore how TNE can complement the existing higher education system, particularly in addressing skills gaps and increasing international student participation.

By adopting these strategic recommendations (see Fig. 21), Spanish and UK universities, along with their respective public administrations, can work together to unlock the full potential of TNE in Spain. A well-coordinated approach will enable UK HEIs to expand their global footprint while strengthening Spain's role as an international education hub.

Figure 21. Strategic recommendations for TNE stakeholders



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