

Transnational education in France, Greece and Spain

Research on student choices
and motivations



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Executive summary

This report analyses the motivations for students who choose to undertake transnational education (TNE) degrees, with a focus on UK TNE degrees in France, Greece and Spain. **TNE can be defined as ‘education delivered in a country other than the country in which the awarding institution is based’.**¹

UK universities enrolled nearly 35,000 students on TNE programmes in France, Greece and Spain in 2022–2023, a significant proportion of the overall UK TNE market in the European Union (EU). Understanding the study motivations of TNE students in these countries can therefore contribute to better insights into student choice, ambitions, decision-making processes and concerns related to UK TNE degrees.

In turn, understanding what motivates students to choose UK TNE, and how they access information about UK TNE, can support the UK higher education sector, including its universities and allied agencies, to develop stronger marketing strategies. This will support the increase in UK TNE across France, Greece, Spain and beyond, where insight might be relevant to other markets.

¹ Universities UK, <https://bit.ly/49boZbL>

The research was undertaken using a combination of primary and secondary methods. These included desk research, analysis of UK Higher Education Statistics Authority (HESA) information, and a survey instrument that was answered by 1,355 TNE students in France, Greece and Spain.

A small number of interviews with students were also conducted and we ran an online community with students from Greece; these helped us to gain insights into personal motivations for undertaking TNE. The survey respondents included students on non-UK TNE programmes, allowing a point of comparison in motivations between UK and non-UK TNE students. There was also a cross section of students from different levels of study, domiciles (home or international students) and models of delivery (international branch campus, collaborative provision and online learning).

The results are primarily based on the survey findings, which reveal some diverse but overlapping reasons why students choose to undertake TNE programmes. They also highlight some specificities about why UK TNE programmes are chosen over those of other countries. The main reasons for selecting UK TNE include:

- the variety of modules offered on UK TNE programmes
- the perceived higher quality of education on UK TNE programmes
- the potential for UK TNE programmes to improve students’ career prospects
- the prospect of developing international professional networks with UK TNE
- the social and cultural experience of being on a UK TNE programme
- the affordability of a UK TNE programme in comparison to studying in the UK.

Other factors that were important to students in choosing TNE programmes (including non-UK TNE) were the proximity to family and home, and the flexibility of TNE programmes to fit into work or family commitments, with the latter being most important to postgraduate students.

The survey results also provided insight into the student decision-making journey for TNE programmes. This can be broken down into three main stages: awareness, consideration and conversion. The awareness stage is primarily driven by searches or interaction in social media, online channels, and existing family or friendship connections. The consideration stage reveals more targeted online searches, detailed searches on institution websites and reaching out to alumni and current students. The final conversion stage involved personal contact with the university.

The survey results show that principal online channels include internet search engines, institution websites and study-abroad websites. Social media was found to play a minimal role in raising awareness and consideration of TNE, whereas word of mouth and family or friend recommendations were an important offline source of awareness and consideration. The report provides five recommendations for improving the awareness and communication of UK TNE programmes.

Recommendation 1 – Make use of the online channels that students use for researching programmes to increase awareness of TNE.

Recommendation 2 – Create defined partnership marketing campaigns to ensure offline channels are used effectively with schools, colleges and agents.

Recommendation 3 – Improve and increase the relevant online information for prospective students, particularly for campus and local partner programmes.

Recommendation 4 – Strengthen marketing strategies and materials by using findings from this report on reasons students choose a TNE programme from the UK.

Recommendation 5 – Develop specific multichannel stories from alumni, student ambassadors and teaching staff.

A broader recommendation is to centralise UK TNE information in a clear and transparent manner on a major agency website, such as Study UK or UCAS (which could then be used for application as well).

Introduction

This British Council report intends to deepen the understanding of perceptions, motivations and decision-making factors of students when choosing TNE programmes. Its aim is to support the efforts of UK higher education institutions and local TNE partners in developing their programmes and marketing strategies.

The report focuses on France, Greece and Spain as country markets to analyse UK and non-UK TNE trends. These three markets represented nearly 35,000 UK TNE enrolments in 2022–2023 (38 per cent of total EU enrolments). This included different models of TNE provision: branch campuses; collaborative provision, such as joint or dual degrees and franchise or validation agreements; and distance learning (including online and hybrid forms). Greece is the largest overall provider in terms of number of enrolments, while Spain is sixth in Europe. Both markets are composed of many franchised, validated and distance-learning programmes. France, despite lower student numbers, offers a wide range of joint, double and dual degrees.

The objectives of the research were:

1. **to understand students' perceptions, reasons, motivations and decision-making processes in choosing a TNE programme in France, Spain and Greece**
2. **to understand why students would rather select a TNE programme instead of other types of programmes**
3. **to understand how UK TNE programmes are perceived against competitor programmes**
4. **to support the efforts of UK higher education institutions and local partners in developing their TNE programmes and marketing strategies.**

The methodology included desk-based research, analysis of HESA information, a survey of 1,355 students enrolled in TNE programmes, a small number of interviews and an online community. TNE mapping was also undertaken in France, Greece and Spain to identify the partnerships between UK institutions and local providers in those countries, and non-UK institutions and local providers.

The literature review provides an overview of the major benefits of TNE and the contexts of the higher education landscape and funding in France, Greece and Spain.

The information analysis provides insights from HESA on UK TNE enrolment trends in France, Greece and Spain. These are also contextualised in inward mobility trends from these countries to the UK. UNESCO information is used to ascertain the number of international students in each of the three countries; international students also represent a potential market for UK TNE in these countries.

The survey results are presented with analysis of motivations for local and international students in France, Greece and Spain choosing TNE programmes. These results are segmented by UK and non-UK TNE programmes, country, level of study, domicile (referring to whether the students are local to France, Greece, Spain, or whether they are international students) and mode of TNE delivery. Further results from the survey about channels of marketing and information are also provided to shape recommendations for improving marketing of UK TNE programmes.

Methodology

2.1 Secondary research

Desk research was conducted to provide context on the environment for the higher education sector in France, Spain and Greece. A literature review on students' reasons for choosing TNE programmes informed the survey and interview questions. HESA information on UK TNE programmes was also analysed to understand student demographics and mobility trends. Furthermore, the websites of UK institutions providing TNE in these countries were reviewed to identify their respective partner institutions and other relevant information. This aided in the mapping of UK TNE provision across the three countries.

2.2 Primary research

2.2.1 Quantitative research

A survey was designed and delivered following the desk research conducted in stage 1. The survey's purpose was to uncover the reasons and decision-making processes of students who are currently in their first or second year on a TNE programme in France, Spain and Greece. The online survey was designed to take approximately ten minutes to complete, and 1,355 responses were collected in total. A panel of higher education students was used to identify the sample for this research. A set of screening questions secured the targeted demographic of TNE students. To ensure that the survey was accurately capturing students on a TNE programme, descriptions and examples of TNE programmes were provided to clarify the concept for survey participants. Students were asked to select the country awarding their degree from a list of 20 countries in Europe. This allowed identification of the TNE programmes selected and their distribution across the host countries.

2.2.2 Qualitative research

Two qualitative methods were used to collect information and were catered to suit participants' schedules and needs. Sixteen detailed, semi-structured, 30-minute online interviews were undertaken with students on a UK TNE programme in France, Spain and Greece. At the same time, an online community of four students was established to provide further understanding of students' motivations for choosing a UK TNE programme.

2.3 Definitions of terms used in the research

1. **Awarding country** – The country where the higher education institution offering the TNE programme is located.
2. **Host country** – The country where the TNE programme is delivered.
3. **Delivery mode** – The format of the TNE programme that the student is studying. The survey categorised this in three ways:
 - Branch campus – physical campus of an institution in the host country, including international branch campus (IBC).
 - Local partner – joint or dual degrees, validation, or franchise partners in a host country.
 - Online/distance learning – the TNE programme is taken online within a host country.
4. **Home-country student** – a student from the host country undertaking the TNE programme.
5. **International student** – a student from a foreign country who goes to a host country to undertake a TNE programme.

Literature review

3.1 The benefits of transnational education

The array of benefits that transnational education (TNE) programmes can offer students has opened new doors to international qualifications. TNE provides the opportunity to study a degree in a student's home country, or abroad, that is awarded from a higher education institution in a different country.

There has been a proliferation in research carried out on TNE programmes over recent years, to gain a deeper understanding of the benefits this can bring to countries hosting the programmes. **These include studies into how TNE programmes answer local labour market needs, how they attract international businesses locally, and whether they have a positive impact on local communities.**²

The Covid-19 pandemic accelerated the growth in the uptake of UK TNE programmes globally;³ this was a time when students had limited opportunities to travel abroad and international student mobility took a turn for the worse.⁴

TNE programmes attract varied demographics of students, including those who are looking for flexibility in their schedule due to commitments related to work, study or other life circumstances.⁵

TNE programmes give added value to students studying in their home country.

Students perceive TNE programmes as giving them access to degrees from well-known international higher education institutions in a more affordable way, without the barriers that can be associated with relocating. This also includes more flexible ways of studying and being able to develop personal, social and cultural benefits.⁶ The chance to study in English is also often identified as an appealing factor, as is the chance of exposure to new cultures with TNE programmes.⁷ Additional studies advocate that career development is the main motivator, whereby students perceive TNE as a means to advance their professional skills and career prospects.⁸

Further research that focuses on student motivations stated that parents, siblings and family members had a larger influence on decision-making when choosing an international academic franchise programme compared with the influence of past teachers. Another study carried out with participants from a TNE programme in Malaysia found that saving on costs was a motivating factor for students by being able to stay in their home country.⁹ There are also motivators behind a perceived increase in a student's chance of future employability when choosing a TNE programme.¹⁰ Chinese students' decisions were found to be driven by the attributes of the Chinese university's reputability, assuming that the international institution would, as a result, also be reputable.¹¹

Perceptions and motivations can overlap in reasons why students choose TNE programmes globally. However, some challenges remain in how well-known TNE programmes are in the host countries. The terms 'transnational education programme' and 'TNE programme' are not widely known by students, and this could be a potential barrier to them researching these types of degree programmes. Additionally, there is a general lack of awareness of TNE programmes in host countries.¹²

TNE serves as a catalyst for student mobility by breaking down barriers to international education and promoting cross-border collaboration in higher education.

A project conducted by the Observatory on Borderless Higher Education investigated whether substitution effects occur within the UK and its four primary TNE host countries. Findings indicate that TNE does not directly replace outbound student mobility but rather contributes to capacity-building initiatives in TNE host nations. Despite its significance, TNE remains a small facet of education export compared with international student mobility. Moreover, the limited influence of TNE on outbound mobility to TNE-exporting countries suggests that these two modes of export cater to distinct student demographics, reinforcing their separate nature.

Research conducted by the British Council indicates that many TNE courses typically have significantly lower tuition fees than the 'international fees' often charged to internationally mobile students. This trend expands access to international education for those who may not have the financial means to pursue traditional international study opportunities.

Furthermore, TNE programmes frequently offer greater flexibility in delivery methods compared to local higher education courses. This includes options such as distance learning or part-time study outside of regular working hours, which particularly appeal to mature students and those balancing education with employment commitments. TNE, especially when delivered online, has the potential to broaden access to international education for students with disabilities who may face health-related travel limitations. Additionally, TNE can serve as a valuable opportunity for students who may not gain admission to selective national higher education institutions, providing them with a second chance at obtaining a higher education.¹³

While TNE offers numerous potential benefits, it also entails risks. One significant challenge is ensuring consistent academic standards and quality assurance across TNE courses and campuses. Universities often grapple with navigating diverse regulatory frameworks, accreditation standards and cultural expectations. Students engaging in TNE programmes may face difficulties in obtaining recognition and accreditation for their qualifications in their home countries or other jurisdictions. This emphasises the importance of recognition by appropriate accrediting bodies to maintain the value and transferability of students' credentials.

In addition to pedagogical concerns, universities must contend with logistical and administrative obstacles, encompassing legal, financial, political and cultural dimensions. Formal TNE programmes that confer degrees can amplify risks associated with international student mobility, necessitating careful consideration of visa regulations, staffing and student support services. Adjusting to new educational cultures can be challenging for students, with differences in language, customs, teaching methods and social norms, as well as concerns about expenses or homesickness potentially hindering adaptation. Higher education institutions (HEIs) can mitigate these risks by offering scholarships, facilitating part-time employment and proactively assisting international students in building social networks and accessing emotional support.¹⁴

² <https://bit.ly/30tJlLZ>

³ <https://bit.ly/3CI8gAH>

⁴ <https://bit.ly/3VeqSip>

⁵ <https://bit.ly/3VcTQio>

⁶ <https://bit.ly/3CM77br>

⁷ <https://bit.ly/4fNjGC1>

⁸ <https://bit.ly/3VcTQio>

⁹ <https://bit.ly/3Zbc4SP>

¹⁰ <https://bit.ly/4fNjGC1>

¹¹ <https://bit.ly/4fNjGC1>

¹² <https://bit.ly/3VcTQio>

¹³ <https://bit.ly/49aSVyy>

¹⁴ <https://bit.ly/413JIBS>



3.2 English language and TNE

English-medium instruction plays a pivotal role in enticing and retaining global enterprises. Additionally, it broadens the scope of international job prospects for students, particularly within multinational corporations domestically. Apart from a few language and cultural courses, this investigation revealed that transnational education programmes predominantly use English as the medium of instruction, providing a great opportunity for local students to improve their English. Although many courses are instructed in English, some instances (primarily in Greece and Cyprus) exist where courses are conducted in the native language.¹⁵ In such scenarios, the objective of using the local language has been to improve access to high-quality international programmes for students who faced obstacles due to their limited English proficiency. These initiatives effectively decreased dropout rates and enabled the engagement of a broader range of local academics.

3.3 TNE in Europe

Europe is at a point where it is exploring more avenues when it comes to internationalisation of higher education. This includes having to consider going beyond internationalising the curriculum and the physical mobility of students.¹⁶ **TNE programmes pose an opportunity to strengthen European identity and democracy, and tackle global challenges identified by the European Commission.**¹⁷ It has been stated that the EU and European Economic Area are evolving their TNE programme models by going from unidirectional (e.g. franchise, validation) to multidirectional collaborations (e.g. double, joint or dual degrees, top-up degrees, split PhDs).¹⁸

Over the past five years the number of UK TNE students in the EU has grown by 46 per cent. This is rather different from the drop in EU students studying abroad in the UK, which saw a reduction after Brexit.¹⁹ Nonetheless, there are still some obstacles for the higher education sector relating to misconceptions about UK TNE, particularly when it comes to building a brand that attracts prospective students. These include a misalignment in the way UK TNE programmes are perceived compared to programmes offered when studying in the UK; the TNE offer can be seen as inferior.²⁰

¹⁵ <https://bit.ly/3OtJjLZ>
^{16, 17} <https://bit.ly/49wR51p>
¹⁸ <https://bit.ly/4ggILWl>
¹⁹ <https://bit.ly/41rtT2N>
²⁰ <https://bit.ly/3B5ykpF>

3.4 Economic landscape

The current economic landscape of France, Greece and Spain can be said to be tumultuous. There are areas of growth post-pandemic, but societal challenges such as population decline, alongside an ageing population, rising costs and chronic unemployment, can hamper each country's economy. Higher education has been recommended as a way of dealing with inequalities, with governments and ministries putting forward plans for the upskilling and reskilling of citizens and improving educational access.

3.4.1 France

France has seen its population growth decline since 2011.²¹ Like other European countries, France has an ageing population. Immigration rates are relatively low compared to countries like Germany; France has around seven million foreign-born nationals (representing ten per cent of its population).²² France's migration policy is hampering its ability to sustain itself, to an extent. France's economy is highly diversified; services represent two-thirds of both the workforce and GDP. However, like its Spanish and Greek counterparts, France's economy has been stagnating in recent years, held back by rising energy bills and limited export growth.²³ The government is taking steps to reform the economy, including budget cuts. Current economic problems are owed in part to labour shortages, in both high- and low-skilled occupations, and recent policies on migration into France could exacerbate this.²⁴ Suggestions have been made for specific training efforts for young people.

²¹ Statista, total population of France: <https://bit.ly/4gmVoPe>
²² INSEE: <https://bit.ly/41j8l2z>
²³ Alliances Trade: <https://bit.ly/4gn0zhX>
²⁴ Euronews: <https://bit.ly/3ZlmtSh>
²⁵ IMF, World Economic Outlook Database: <https://shorturl.at/gmpDH>
²⁶ Economic Survey of Greece 2023: <https://bit.ly/3Zld9D7>
²⁷ OECD: <https://bit.ly/3ZDmlsj>
²⁸ European Commission, Economic Forecast for Spain: <https://bit.ly/3Zln2VP>
²⁹ OECD: <https://bit.ly/3ZGIDth>
³⁰ OECD: <https://bit.ly/3Zoqj6T>

3.4.2 Greece

The 16th largest economy in the European Union and the 53rd largest in the world,²⁵ Greece's economy is mainly service oriented (80 per cent) given the prevalence of tourism and shipping industries. Greece's economy has seen peaks and troughs throughout the last 15 years, starting with a ten-year recession in the aftermath of the global financial crisis of 2007–2008, but the country's economy has recovered well post-pandemic. The latest OECD Economic Survey of Greece points to increasing investments and exports, government support measures and the implementation of the Greece 2.0 Recovery and Resilience Package helping to generate strong economic and employment growth.²⁶ However, the economy faces difficulties if momentum is not maintained. As part of the Economic Policy Reform, improving the quality of education is recommended to help bolster the job market.²⁷

3.4.3 Spain

Despite external challenges, Spain's economy has held up well in recent years, with moderate, steady GDP growth of 2.5 per cent in 2023.²⁸ This success is partly attributable to declining unemployment rates, which were previously noted as being chronically high.²⁹ To deal with low employment rates and poverty, Spain is aiming to implement reforms to resolve skill mismatches with its Recovery, Transformation and Resilience Plan. While the economy has been resilient, Spain still has lasting problems affecting its people, such as job insecurity, low salaries and high rates of early school leavers and those without an upper-secondary qualification (27 per cent of 25-to-34-year-olds).³⁰

3.5 The higher education landscape in France, Spain and Greece

3.5.1 Overview

The higher education landscape in the UK has changed rapidly in the last few years, with major external challenges affecting higher education provision and access. Factors such as Brexit, a global pandemic, global wars and changes to immigration policy have caused serious disruption in the sector. However, **universities have proven able to adapt and innovate to deal with these challenges, leading to the mainstreaming of e-learning and micro-credentials, and the launch of initiatives to strengthen higher education collaborations.**

This is no different for the higher education sector in Europe. Generally, France, Greece and Spain's higher education policies have been led and influenced by the wider EU, to the benefit of these countries. Programmes such as Erasmus+ engaged 73,000 organisations and accounted for 1.2 million mobility participants in 2022 alone.³¹ The recent launch of the European Universities Initiative (EUI) will help to improve the international competitiveness of higher education institutions within Europe.

The EUI is a flagship initiative of European strategy with the ambition to establish alliances between higher education institutes across Europe to the benefit of their students, staff and wider society.³² **The aim is for European universities to develop and implement an integrated long-term joint strategy for education. Short term, the plan is to engage more than 500 higher education institutes by mid-2024.** Both of these goals are ambitious.

While facing the societal problems seen across Europe, France, Greece and Spain have their own individual successes and barriers affecting higher education too. Their governments are listening, though, and these economic, political and international factors are the drivers of change in their individual and collective higher education landscapes.

3.5.2 Education sector overview and policy

More than ever, higher education and education generally are being incorporated into long-term strategies for these countries. Post-pandemic, governments are rethinking how education is offered. Accessibility of education is first and foremost, but the Council of the EU has also adopted a recommendation on vocational education and training (VET) for sustainable competitiveness, social fairness and resilience. Principles include ensuring VET is agile in that it adapts swiftly to labour market needs,³³ which is staked to help answer market needs.

3.5.2.1 France

The higher education sector in France is one of growth. In France, the public and private higher education systems have 2.7 million students,³⁴ and this has more than doubled since 1980.³⁵ Between 2000 and 2021, the share of 25-to-34-year-olds with tertiary attainment in France increased by 19 per cent, and over 81 per cent of those aged 25 and over had completed upper secondary or tertiary education in France.³⁶ While France enjoys a well-educated population from higher education provided by its 620 university providers, challenges to its education system, including underfunding, have been noted by analysts. Education overall is becoming more of a priority, with measures adopted between 2017 and 2021 representing a significant overhaul,³⁷ but average spending per student is still low compared to OECD counterpart countries.³⁸ France's response to low skills and unemployment has been to increase investment in education and training towards digital and green transition, including VET.³⁹

3.5.2.2 Greece

Greek society places a high value on higher education, making it a priority enshrined in the Greek constitution. In 2022, 45.2 per cent of Greeks aged 25 to 34 held a tertiary education degree, compared with the EU average of 42 per cent.⁴⁰ This constitutes an increase of 10.7 percentage points over the last decade compared with an average EU increase of 7.9 per cent during the same timeframe.⁴¹

3.5.2.3 Spain

Vocational training is now a priority area within education and economic policy in Spain, with plenty of financial provision and resourcing to deal with economic inequalities and reduce barriers such as skills shortages.⁴² With education reforms and expansion, Spaniards are becoming more educated. Student enrolment at Spanish universities has increased steadily over the past decade, resulting in 1.69 million enrolled in higher education in 2023.⁴³ In the adult population aged 25 to 64, the percentage of those with higher education qualifications rose from 24.9 per cent in 2002 to 41.1 per cent in 2022.⁴⁴

3.6 Education model funding

France, Greece and Spain all conform to the Bologna Process, as part of the European Higher Education Area (EHEA), which provides a common framework for higher education, specifically the teaching and awarding of degrees. Even France, with its complex education model, can establish recognition of degrees across participating member countries. Study at public universities in France, Greece and Spain is free or low-cost; however, each country uses different models to provide private education.

3.6.1 France

A complex system for international students, most higher education in France is characterised by a distinctive two-tier system.⁴⁵ Education provision is provided by public universities, which provide programmes geared towards research and application, and by grandes écoles, which recruit students by means of competitive admission policies and provide a high level of specialised training. There are also specialised schools and French schools abroad. At these institutions, students can pursue either a vocational diploma (two-year technology-oriented degrees), optionally followed by an additional qualifying year of study, or an academic diploma. All higher education institutions are structured into three study cycles, which best match the bachelor's, master's and doctorate degree structures and are in accordance with the principles of the Bologna Process. Due to government funding and subsidisation of public higher education, in which resources increased by 5.5 per cent between 2020 and 2021,⁴⁶ tuition fees for public universities are low for both EU and non-EU students.⁴⁷ However, private institutes and grandes écoles incur costs in line with tuition internationally.

3.6.2 Greece

Higher education is public in Greece; it is provided for free and only by public institutions, and there are no private HEIs in the country. Private colleges operate within Greece; however, these do not function as independent universities, but rather they partner with universities internationally to offer undergraduate and postgraduate programmes accredited by the partner university.⁴⁸ Greek HEIs enjoy administrative and academic freedom, but they must conform to quality standards set by the Hellenic Authority for Higher Education (HAHE), an independent administrative authority under the supervision of the Ministry for Education and Religious Affairs. While higher education is provided by HEIs, until recently there were two distinct sectors: the university sector, which includes universities, national technical universities and the Higher School of Fine Arts; and the technological sector, which includes technological educational institutions (TEIs) and the School of Pedagogical and Technological Education. However, as of 2019, TEIs have merged with university institutions by decree of law to create synergies and boost the economy.⁴⁹

There are 24 HEIs within Greece, and admission to these HEIs is based on student performance in the National Hellenic Exams taken during secondary school.⁵⁰ Each year, around 87,000 students enrol in higher education in Greece, and the enrolment rate of students aged 20–24 in bachelor's programmes in Greece is one of the highest among OECD and partner countries.⁵¹ However, only around 50 per cent of enrolled students go on to graduate from their degree, indicating further cultural or education system problems to be dealt with.⁵²

3.6.3 Spain

Higher education in Spain is delivered by both public and private universities. The Ministry of Education and Culture is responsible for regulating courses at both public and private HEIs. Legislation indicates that universities have administrative, academic and financial autonomy,⁵³ although they are still governed by state regulations.⁵⁴ The Spanish university system comprises 89 universities, of which 50 are public and 39 are private. Most of these institutions provide on-site teaching, but one public and five private universities are distance learning only.⁵⁵ The community of Madrid hosts the most universities (17),⁵⁶ but there is university representation in most of Spain's regions.

Higher education is provided by either university education – where programmes are organised into bachelor's, master's and PhD, and qualifications correspond to levels established in the European Qualifications Framework⁵⁷ and Bologna Process – or non-university education, such as specialised education programmes and advanced vocational training. Vocational training is now a priority within education and economic policy in Spain, with plenty of financial provision and resourcing to deal with economic inequalities and reduce barriers such as skills shortages.⁵⁸

³¹ Erasmus: <https://bit.ly/4e8QnsC>

³² European Commission, Education: <https://bit.ly/3B66F73>

³³ European Commission, Education: <https://bit.ly/3XxqBHC>

³⁴ Eurydice: <https://bit.ly/4ed8YnG>

³⁵ Statista: <https://bit.ly/4eu729M>

³⁶ Statista: <https://bit.ly/4e22aZM>

³⁷ Institut Mont: <https://bit.ly/3MWcK8B>

³⁸ Institut Mont: <https://bit.ly/3TxsrHc>

³⁹ CEDEFOP: <https://bit.ly/3ZnXyZA>

⁴⁰,⁴¹ Eurostat: <https://bit.ly/3ZrQcnO>

⁴² Eurydice: <https://bit.ly/4ddKvgD>

⁴³ Statista: <https://bit.ly/47uGfbc>

⁴⁴ La Moncloa: <https://bit.ly/3XrvUs5>

⁴⁵ EuroEducation, France: <https://bit.ly/3BJUNhJ>

⁴⁶ Ministry for Higher Education and Research: <https://bit.ly/3zzviZj>

⁴⁷ Campus France, Tuition fees in France: <https://bit.ly/4ddgc9Q>

⁴⁸ Ekke: <https://bit.ly/3TxvkYy>

⁴⁹ ACA: <https://bit.ly/4e252G2>

⁵⁰ Study in Greece: <https://studyinggreece.edu.gr/universities/>

⁵¹ OECD GPS: <https://bit.ly/3MMxf7X>

⁵² <https://bit.ly/3Xx4Ya7>

⁵³ Euroeducation: <https://bit.ly/3MQXGJs>

⁵⁴ Eurydice: <https://bit.ly/4d9bcD1>

⁵⁵ Ministry of Universities, University structure: <https://bit.ly/4e7snpy>

⁵⁶ Statista: <https://bit.ly/3ZAHdR8>

⁵⁷ Eurydice, Higher education in Spain: <https://bit.ly/4d9bEBd>

⁵⁸ Eurydice: <https://bit.ly/4ddKvgD>

3.7 Internationalisation

On the international higher education landscape, all three countries benefit from their positioning within the EU and participation in Erasmus+. They are part of European alliances and **transnational education partnerships to encourage and promote student and staff mobility**. All have seen success to some degree, although bachelor-level study continues to be a problem. **France, Greece and Spain are all conscious of internationalisation as a priority, albeit to differing extents, and are introducing or have introduced policies to improve access and quality of higher education.**



3.7.1 France

Positively, France has experienced a post-pandemic rebound in its international recruitment, particularly marked in business, management and accounts schools (up 23.8 per cent).⁵⁹ The number of international students enrolled in France grew by eight per cent in 2021–2022 and has now exceeded the 400,000 mark. This is the strongest growth recorded in more than 15 years, notably due to the increase in the number of European students (by 21 per cent) and exchange students (by four per cent).⁶⁰ While initially slow to implement international policy, France has now established long-term plans to improve its foreign enrolment. France's international recruitment strategy outlines its goal to host 500,000 international students by 2027,⁶¹ which would account for five per cent growth each year. This is an ambitious objective that is encouraged by the fact that most French HEIs already have mobility programmes in place, either as European programmes (Erasmus+) and bilateral mobility agreements (such as the Fulbright and Entente Cordiale programmes), or other work placement and scholarship grants. According to Erasmus+ information, in 2021 France was the third most chosen country by the programme's students and personnel.

Progress to this goal has also been assisted by pushback on legislation that would impede inbound international student mobility. Passed in late 2023, measures from France's Immigration Bill were set to enforce migration quotas, deposits for student visa applications and requirements for proof of students engaging in serious study each year. As of January 2024 these measures have been removed from the bill, and this change is felt by public bodies to be beneficial in strengthening France's position as a host country for international students.⁶²

3.7.2 Greece

Internationalisation is an essential consideration for Greece, and so the state has created an innovative legislative framework to remove barriers to international mobility and partnerships. By encouraging inbound mobility, the Ministry of Education and Religious Affairs aims to turn Greece from a country that sends students abroad to an international destination. This means strengthening access and upgrading the educational quality of Greek HEIs.⁶³ Greece's Erasmus+ engagement and continuing mobility programmes will help to enable this, as will the HEI mission, as outlined by law, to develop collaborations and alliances with higher education institutions abroad.⁶⁴

However, despite encouraging figures, the percentage of international students entering bachelor's programmes specifically is relatively low – just 2.5 per cent in 2021.⁶⁵ There is some strength in the number of international students entering master's and PhD programmes, but Greece will need to deal with its education quality and the financial barriers students can face when undertaking bachelor's programmes.

3.7.3 Spain

Internationalisation of the Spanish university system is outlined as a priority objective of Spanish policy for university education. Its membership of the EU, engagement with mobility initiatives such as Erasmus+ and cultural and historical bonds with Latin America ensure that Spain maintains strong international education links. More than 50,000 international students study in Spain each year with mobility programmes.⁶⁶ Via the Erasmus+ programme alone (of which Spain has been a member since 1987), in only the five years between 2017 and 2022, Spain received over 142,000 international students, making it one of the top destinations for the programme.⁶⁷ Spanish institutions play a driving role in the EU too, with 44 per cent of the 50 European alliances in this initiative involving Spanish universities.⁶⁸

However, Spain is still facing barriers and trying to attract international students to certain programmes. In 2019, the percentage of international students in Spain reached 26 per cent in doctoral studies and 21 per cent in master's studies, while in the case of bachelor's studies the figure was only 3.9 per cent. This indicates Spain is well below the EU average (8.1 per cent) and the OECD average (4.8 per cent) of bachelor-level programmes.⁶⁹ This low percentage may in part be due to the double access requirement for international students, which includes a compulsory entry access test (the EBAU) – understood to be difficult to pass for foreigners, given the Spanish history and philosophy elements of the test. Domestic universities are lobbying the Ministry of Education in Spain for changes, or the elimination of such tests, so that international mobility rates can improve.⁷⁰

⁵⁹ Erasmus: <https://bit.ly/4e8QnsC>

⁶⁰ European Commission, Education: <https://bit.ly/3B66F73>

⁶¹ European Commission, Education: <https://bit.ly/3XxqBHC>

⁶² Eurdyce: <https://bit.ly/4ed8YnG>

⁶³ Statista: <https://bit.ly/4eu729M>

⁶⁴ Statista: <https://bit.ly/4e22aZM>

⁶⁵ Institut Mont: <https://bit.ly/3MWcK8B>

⁶⁶ Institut Mont: <https://bit.ly/3TxsrHc>

⁶⁷ CEDEFOP: <https://bit.ly/3ZnXyZA>

⁶⁸ Eurostat: <https://bit.ly/3ZrQcnO>

⁶⁹ Eurdyce: <https://bit.ly/4ddKvgD>

⁷⁰ Statista: <https://bit.ly/47uGfbc>

TNE in France, Greece and Spain: Data analysis and TNE mapping

This section presents two sets of analyses relevant to understanding the scale and models of TNE in France, Greece and Spain.

First, UK Higher Education Statistics Authority (HESA) information is analysed to determine UK TNE enrolments in France, Greece and Spain in the five-year period from 2018/2019 to 2022/2023. HESA information is also analysed to determine inward direct recruitment from those three countries into UK university home campuses, which provides a sense of the overall scale of demand for UK higher education from France, Greece

and Spain. Information from UNESCO's Institute for Statistics (UIS) is also analysed to determine the trends of international recruitment into France, Greece and Spain, which may be relevant for understanding the potential for UK TNE to acquire foreign as well as domestic students in those countries.

Second, TNE provision has been mapped.

4.1 HESA data analysis and inward mobility (international students)

4.1.1 HESA data analysis for UK TNE delivery in France, Greece and Spain

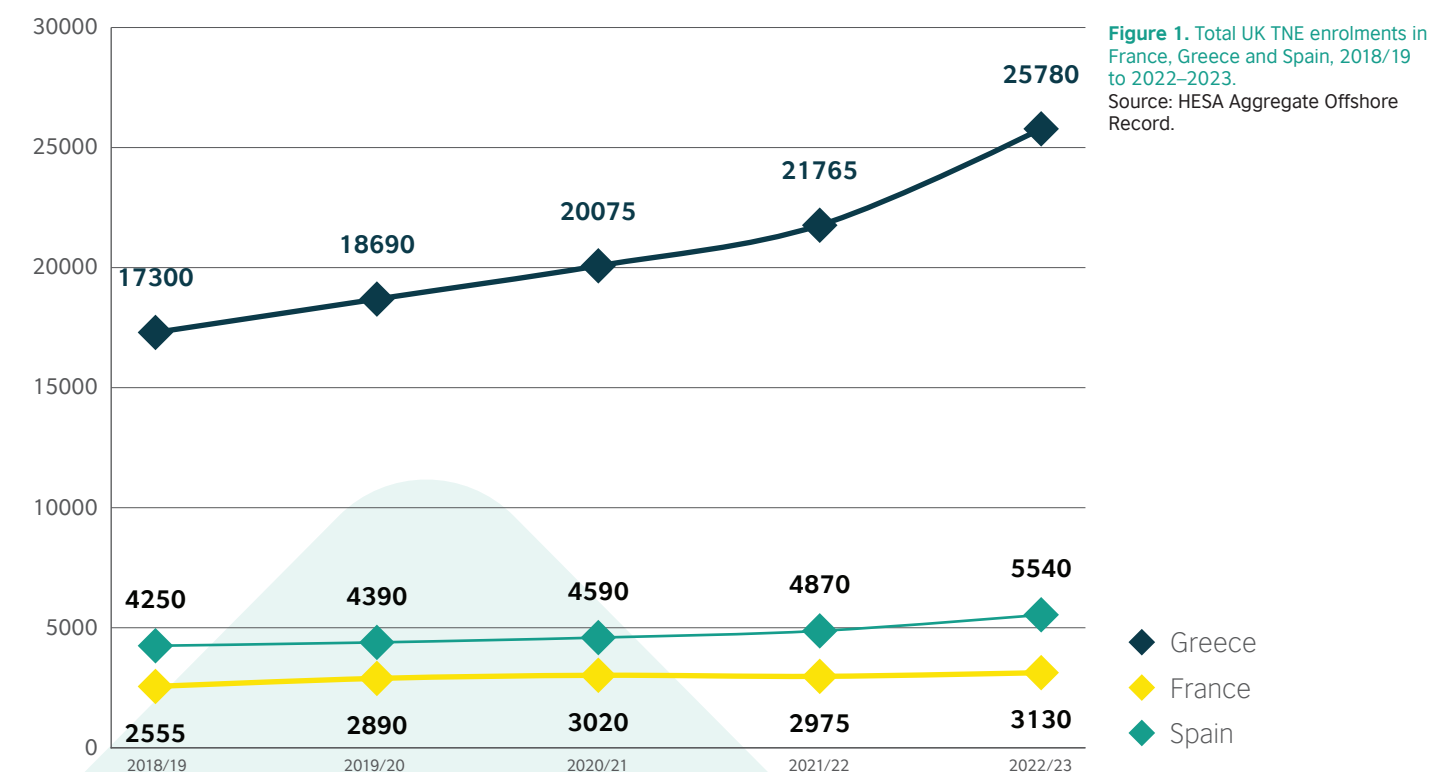


Figure 1 shows that Greece has the largest number of TNE enrolments for UK universities of the three countries, significantly higher than both France and Spain. In the five-year period from 2018/19 to 2022/2023, UK TNE enrolments grew by 49 per cent in Greece, compared to 30 per cent in Spain and 23 per cent in France. Greece can be considered an important global TNE market for the UK; in 2022/23, it had the sixth highest UK TNE enrolments in the world and the highest in the EU.

The following figures show the split in UK TNE enrolments in each country according to level of study.

Figure 2. UK TNE enrolments in France, by level of study

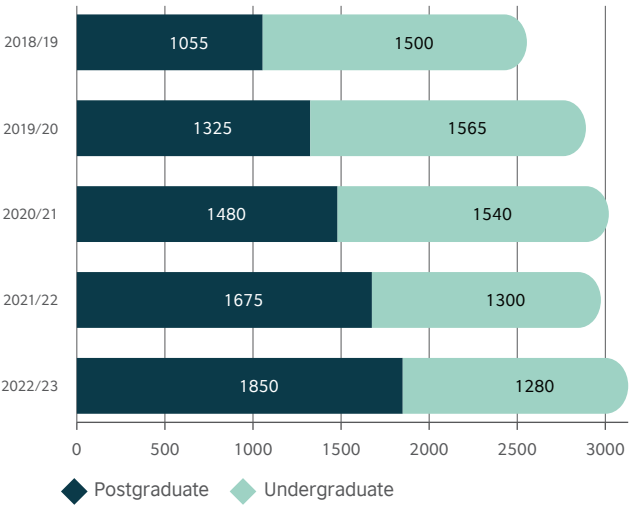


Figure 3. UK TNE enrolments in Greece, by level of study

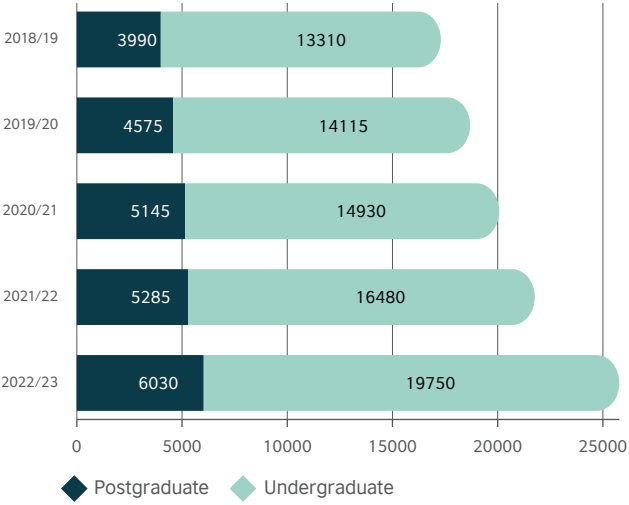


Figure 4. UK TNE enrolments in Spain, by level of study

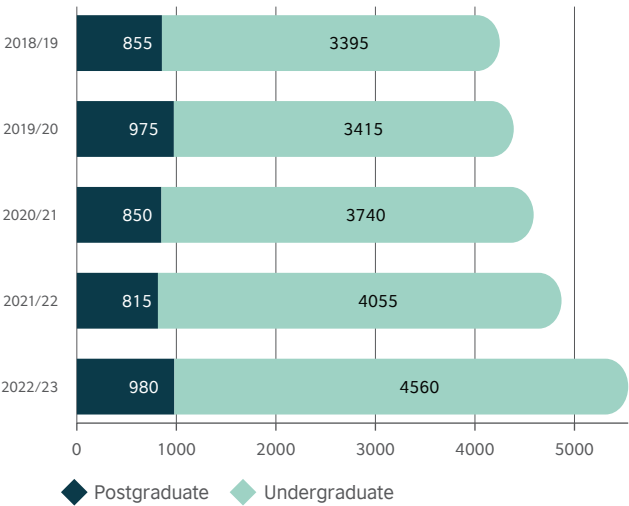


Figure 2 shows that there has been a gradual shift in the balance between undergraduate and postgraduate UK TNE in France; in 2021/2022 postgraduate UK TNE enrolments overtook undergraduate TNE in France, a trend that continued in 2022/23. In Greece and Spain, figures 3 and 4 show that undergraduate UK TNE enrolments have been consistently higher than postgraduate enrolments. In 2022/23, undergraduates accounted for 77 per cent of UK TNE in Greece and 82 per cent of UK TNE in Spain, compared to just 41 per cent in France.

Figures 5–7 show the model of UK TNE provided in each of the three countries, based on HESA information, which provides four different categories for universities to record their TNE enrolments. These categories are focused on the type of registration, and these have been approximated to three different models of TNE.

Table 1. Categories for different models of TNE

HESA category for recording TNE enrolments	Model of TNE
Registered at reporting provider – studying overseas for UK HEP award at overseas campus of reporting provider	International branch campus
Registered at reporting provider – studying overseas for UK HEP award other than at an overseas campus of reporting provider	Collaborative provision (this could include direct collaborations between degree awarding institutions, e.g. joint or dual degrees, or franchise/validation models between UK universities and foreign non-degree awarding bodies)
Registered at overseas partner organisation – studying overseas for an award of the reporting provider	
Registered at reporting provider – distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas	Distance learning, including online learning

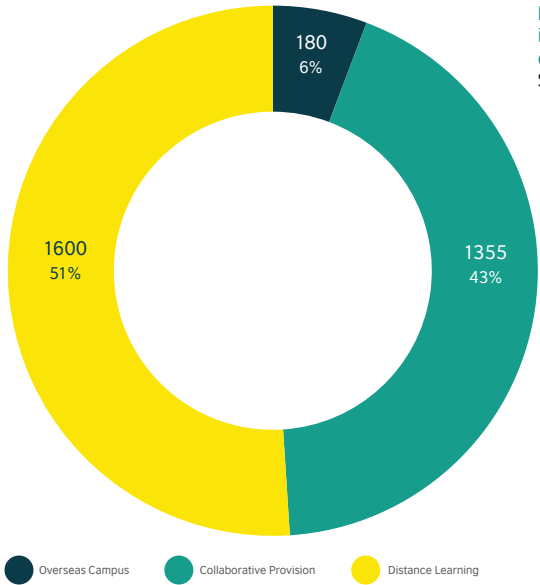


Figure 5. UK TNE delivered in France in 2022/23 by model of TNE (including enrolments and percentage of total). Source: HESA

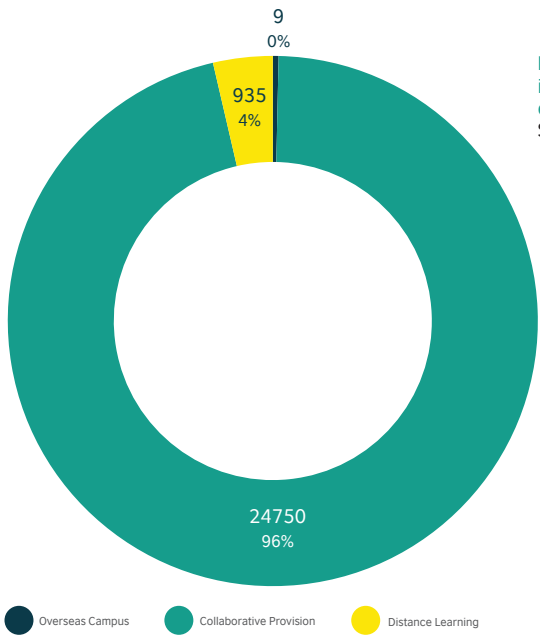


Figure 6. UK TNE delivered in Greece in 2022/23 by model of TNE (including enrolments and percentage of total). Source: HESA

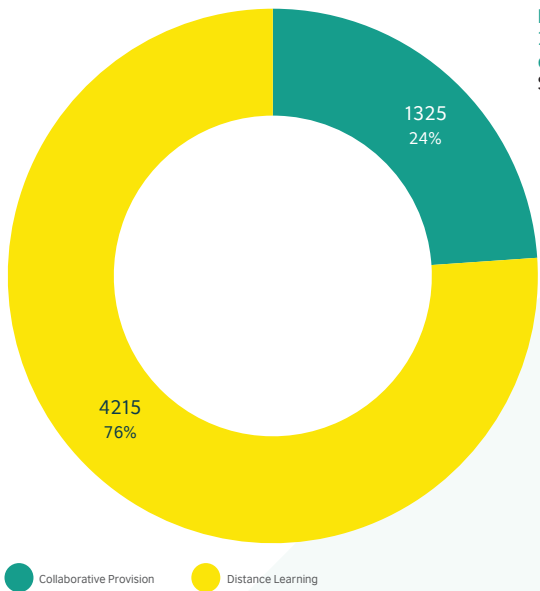


Figure 7. UK TNE delivered in Spain in 2022/23 by model of TNE (including enrolments and percentage of total). Source: HESA

Figures 5, 6 and 7 show significant differences in the model of UK TNE delivery in each country in 2022/23.

In France, a slight majority of UK TNE enrolments (51 per cent) are by forms of distance learning. In distance learning TNE there may not be a specific partnership between a UK and foreign institution. In Greece, the vast majority (96 per cent) of UK TNE is through forms of collaborative provision, though HESA does not identify the type of collaboration (e.g. joint or dual degree, franchise).

Spain also has a majority of UK TNE provided collaboratively (76 per cent), but also significant distance learning TNE (24 per cent). Across all three countries, UK TNE enrolments by the international branch campus model remain low, with 270 in total (only in France and Greece, as Spain had zero branch campus enrolments).

Figure 8. Number of UK universities providing TNE in France, Greece and Spain, 2018/2019 to 2022/2023 (five enrolments per institution minimum). Source: HESA Aggregate Offshore Record.

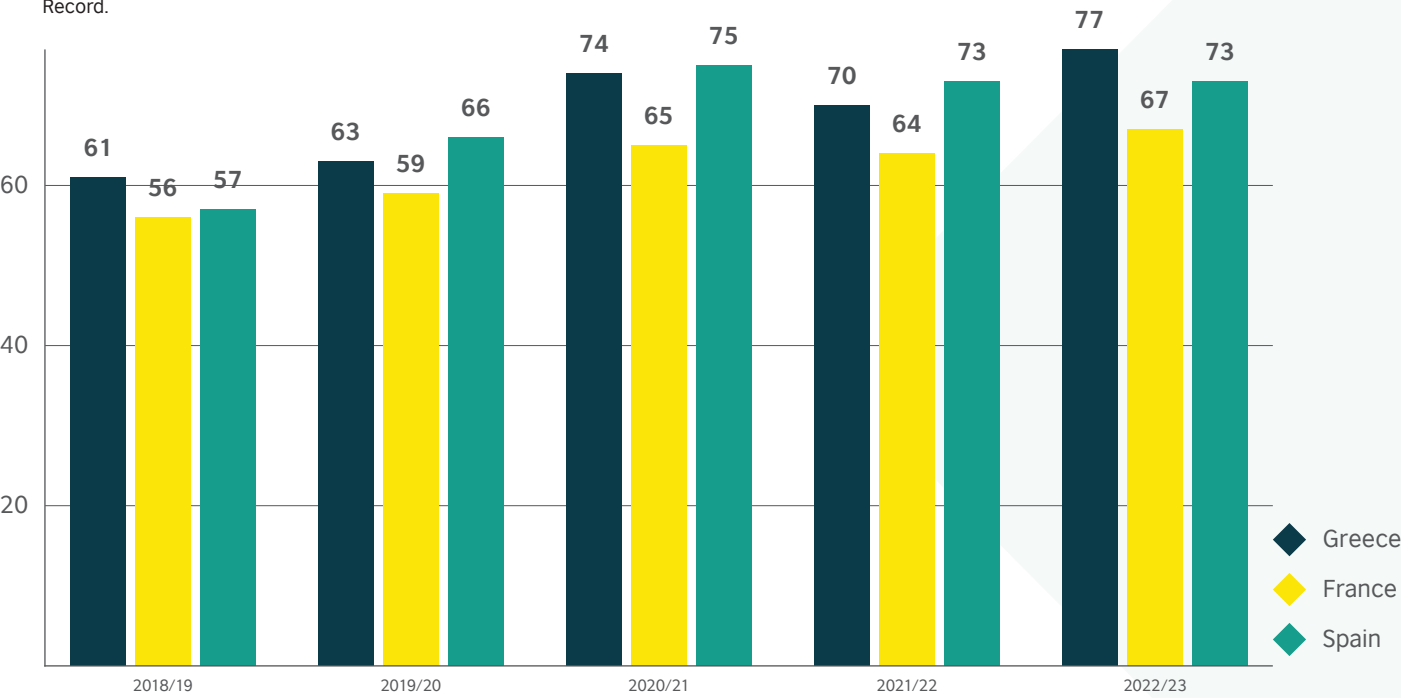


Figure 8 shows that Greece had the highest number of UK universities with at least five TNE enrolments, overtaking France in 2022/23.

Across all three countries, there has been an increase in the number of UK institutions providing TNE with at least five enrolments.

UK university	Undergraduate TNE enrolments	Postgraduate TNE enrolments	Total
Manchester Metropolitan University	265	120	380
Coventry University	225	130	355
The Open University	220	45	265
University of London	130	110	240
Lancaster University	0	180	180

Table 2. The top five UK universities for undergraduate and postgraduate enrolments in France 2022/23. Source: HESA

UK university	Undergraduate TNE enrolments	Postgraduate TNE enrolments	Total
The University of East London	3705	880	4585
The Open University	3625	15	3635
Queen Margaret University, Edinburgh	3035	0	3035
University of Derby	1805	820	2620
The University of Essex	1495	460	1955

Table 3. The top five UK universities for undergraduate and postgraduate enrolments in Greece 2022/23. Source: HESA

UK university	Undergraduate TNE enrolments	Postgraduate TNE enrolments	Total
University of Wales Trinity Saint David	1345	155	1495
London Metropolitan University	475	60	535
University of Bedfordshire	480	0	480
University of Derby	375	15	395
The Open University	360	30	390

Table 4. The top five UK universities for undergraduate and postgraduate enrolments in Spain 2022/23. Source: HESA

Tables 2, 3 and 4 show the top five UK universities providing TNE in each of the countries in terms of enrolments in 2022/2023.

The Open University, which delivers TNE exclusively in the ‘distance learning’ category, is featured in the top five of each of the three countries. The University of Derby also appears in the top five for both Greece and Spain.

In Greece, the largest provider of UK TNE is the University of East London (UEL) with 4,585 enrolments across undergraduate and postgraduate programmes. UEL’s undergraduate enrolments alone (3,705) are more than the entire UK TNE enrolments in France, providing a sense of the scale of TNE activity in Greece. The Open University also has significant TNE enrolments in Greece (3,635), considerably higher than their TNE activity in France (265 enrolments) or Spain (390 enrolments).

In Spain, the largest provider of UK TNE is the University of Wales Trinity Saint David, which has nearly three times as many enrolments as its nearest competitor. It is also one of only three UK universities that has more than 50 postgraduate TNE enrolments in Spain (the other three are London Metropolitan University, the University of Nottingham and the University of London, with the latter two not in the top five for overall TNE enrolments in Spain). In terms of the models of TNE delivered, collaborative forms of TNE provision have the highest enrolments across all countries.

France has a higher proportion of its UK TNE students studying by distance learning than Greece or Spain. France also has the highest number of TNE enrolments assigned to a university operating a branch campus across the three countries, with 125 enrolments for Queen Mary University of London registered in that category.

In Greece, collaborative provision is the main model of TNE. The Open University reports TNE enrolments in both the collaborative provision categories (3,540) and the distance learning categories (100). The Open University has validation partnerships with two post-secondary colleges in Greece.

In Spain, collaborative provision is the dominant model of TNE, led by high enrolments for the University of Wales Trinity Saint David. UK TNE provided by distance learning is less prominent, with The Open University and the University of London registering 580 enrolments between them.

The institutional partnerships underpinning the collaborative provision model of UK TNE in France, Greece and Spain are further explored in section 4.2. However, further HESA analysis of inward mobility trends from the three countries into the UK is offered below to contextualise the overall demand for UK higher education from students in these markets.

4.1.2 HESA data analysis for inward mobility

This section analyses inward mobility information to the UK from France, Greece and Spain. The rationale for including this information is to provide an understanding of the demand for UK higher education from these three countries.

Figure 9. Inward mobility to UK universities from France, Greece and Spain, 2017/18 to 2021/22. Source: HESA

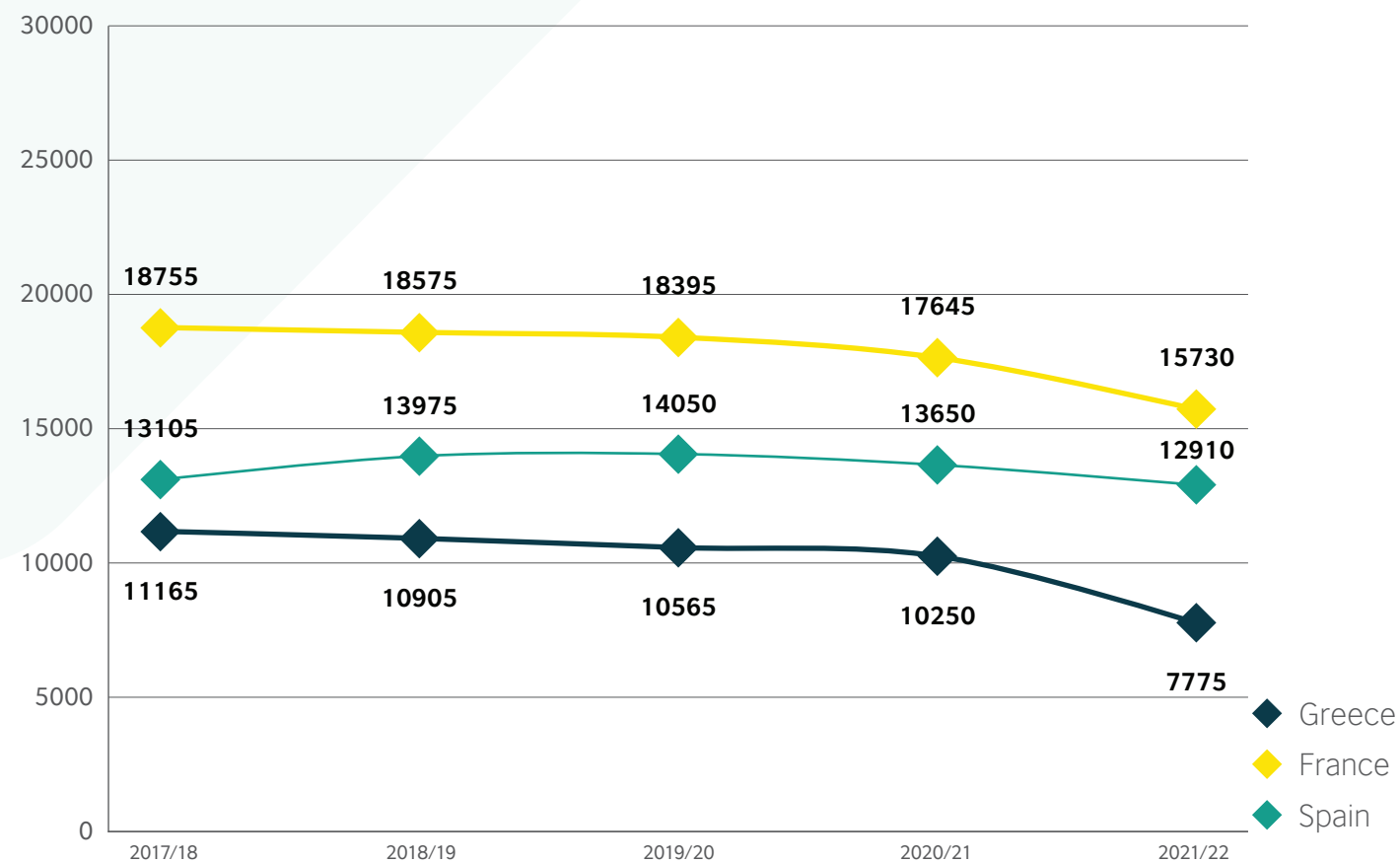


Figure 9 shows that there has been sharp decline in inward mobility to UK universities from France and Greece in the last five academic years, and a smaller overall decline from Spain. A significant reason for this decline must be attributed to the impact of Brexit, particularly the loss of 'home student' status for students from the EU, which has meant that EU students are charged at the same rate as international students. This has made studying in the UK more expensive for all prospective EU students.



Figure 10. Total UK Inward mobility and TNE comparison for France, 2017/2018 to 2021/2022. Source: HESA

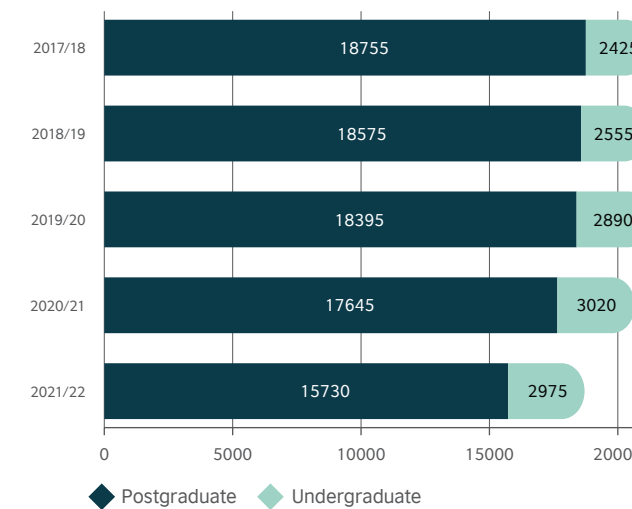


Figure 11. Total UK Inward mobility and TNE comparison for Greece, 2017/2018 to 2021/2022. Source: HESA

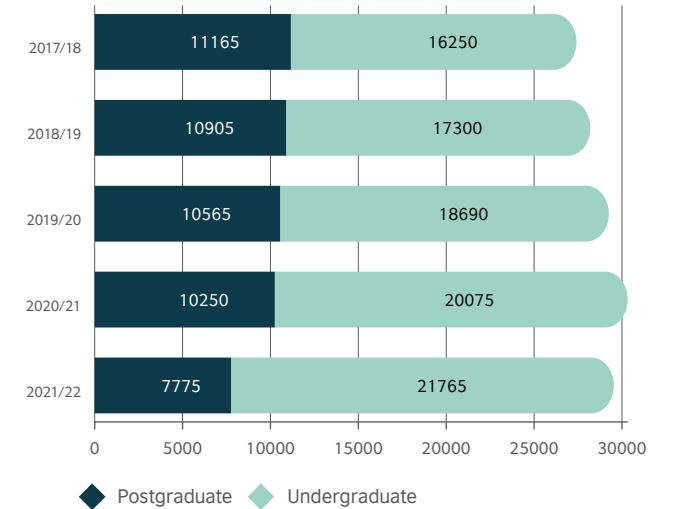
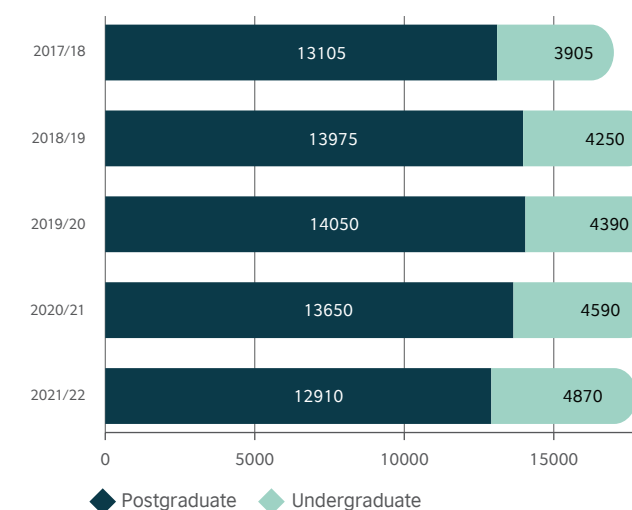


Figure 12. Total UK Inward mobility and TNE comparison for Spain, 2017/2018 to 2021/2022. Source: HESA



Figures 10, 11, and 12 show the comparison between inward mobility to the UK and TNE in France, Greece and Spain. Inward mobility and TNE combined (as shown for each year in the figures above) constitute the overall level of international students enrolled by UK universities.

For Greece, TNE enrolments constitute 73.7 per cent of all international students from Greece studying for UK degrees in 2021/22, compared to 15.9 per cent for France and 27.4 per cent for Spain. This indicates that students from Greece are far more likely to study for a UK degree by means of TNE rather than in the UK itself. The opposite is true for students in France and Spain.

However, a dominant trend worth noting is that across all three markets, the proportion of TNE to overall international student recruitment has grown over the last five years. Between 2020/2021 and 2021/2022, increases in the proportion of students enrolled in TNE have not been enough to prevent an overall decline in student recruitment numbers from all three markets. A challenge and strategic question for the near future for UK universities is whether TNE enrolments can be sufficiently bolstered to compensate for the clear trend of declining inward recruitment from France, Greece and Spain.

4.1.3 UNESCO data analysis for international recruitment

This section analyses UIS information to understand the potential for UK universities to recruit non-resident students in France, Greece and Spain to UK TNE programmes in those countries. International students potentially diversify the recruitment pool for UK TNE programmes.

	France	Greece	Spain
Total number of mobile students hosted	263,459	23,792	80,862
Percentage of total mobile students	4.1%	0.4%	1.3%
Inbound mobility ratio	9.1%	2.8%	3.6%

Table 5. International student mobility in France, Greece and Spain. Source: UNESCO Institute of Statistics

The inbound mobility ratio for students studying in France is higher (9.1 per cent) than for Greece (2.8 per cent) and Spain (3.6 per cent).

The top three sources of international students in France are Morocco (accounting for 14 per cent of international students in France), Algeria (nine per cent) and China (nine per cent). In Greece, the top three sources of international students are Cyprus (accounting for 63 per cent of all international students in Greece), Albania (six per cent) and Germany (five per cent). For Spain, France is the most important source market for international students (accounting for 13 per cent), followed by Colombia (nine per cent) and Italy (eight per cent).

This information might be useful for UK providers providing TNE in France, Greece and Spain. For example, while France currently hosts the least UK TNE out of the three countries, it also has the largest market for international students, including over 30,000 students from Morocco alone. Similarly, while Greece hosts less than ten per cent of the number of international students than France, there are still over 13,000 students from Cyprus studying in Greece – a sizeable potential TNE recruitment pool for UK providers.

The UK is the first destination country for both Greek and Spanish students, with 17 per cent of Greek students and 22 per cent of Spanish students choosing the UK for their studies. Apart from the UK, many Greek students also go to Germany (11 per cent), Cyprus (ten per cent) and Bulgaria (ten per cent). Germany (14 per cent) is also a big market for Spanish students, followed by the United States (12 per cent) and France (ten per cent). The top country for French students is Belgium (18 per cent), followed by Canada (12 per cent) and Switzerland (12 per cent), while the UK is the fourth destination country for French students with 11 per cent.

Looking at where students come from for each of the three countries, Morocco, Cyprus and France were the top domiciles for France, Greece and Spain respectively. Moroccan students accounted for 14 per cent of the total number of international students in France, followed by Algeria (nine per cent) and China (nine per cent). Cyprus held the largest share of international students in Greece with 63 per cent, followed by Albania at only six per cent and Germany at five per cent. French students accounted for 13 per cent of internationals in Spain, with Colombia and Italy following at nine per cent and eight per cent respectively. It is notable that none of the largest domiciles for France were European, while the majority for Greece were. There was also a larger number of students from South American countries choosing Spain. This trend can be linked to language and cultural affinities; South American students often choose Spain for their higher education due to the shared Spanish language, which can make both academic and social integration smoother.

4.2 TNE mapping

4.2.1 UK TNE in France, Greece and Spain

4.2.1.1 UK TNE in France

For France, a total of 29 formal UK TNE partnerships were verified, provided by 34 French institutions. The highest number of UK TNE registrations (of the HESA AOR) was for Coventry University, with approximately 400. Subjects provided by TNE were dominated by those in the business and management, engineering and technology areas. There is a concentration of UK TNE provision around the capital, Paris. In addition to this, two IBCs were identified, with the University of Kent and University of London having branch campuses in France. Postgraduate courses seem to be the most popular here (see figure 13).

Figure 13. France-UK TNE Activity

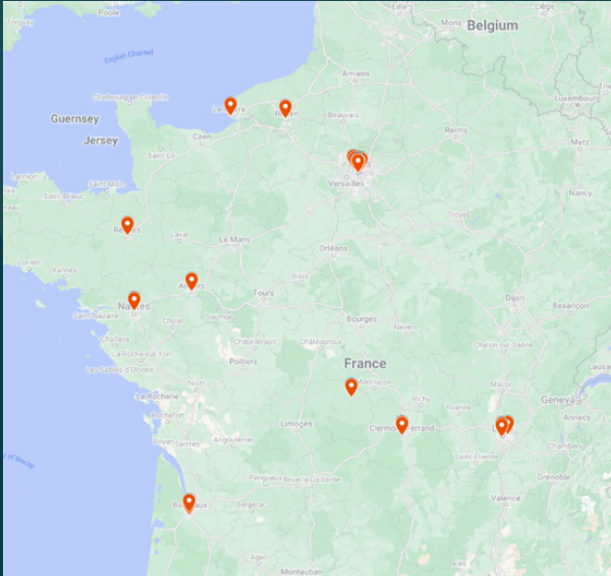


Figure 14. Greece-UK TNE Activity

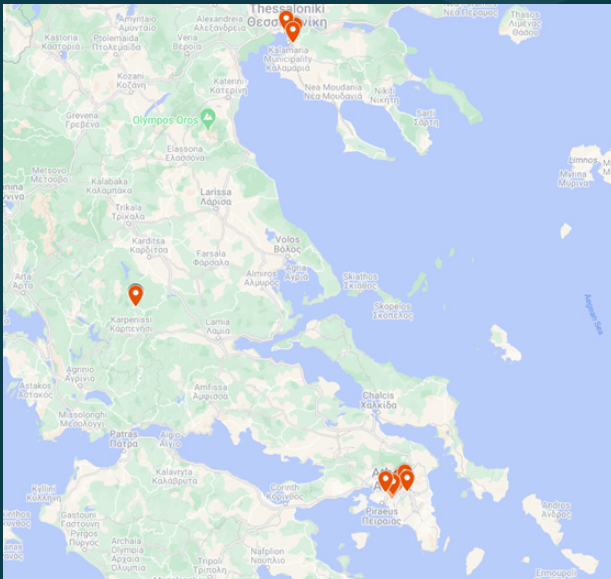
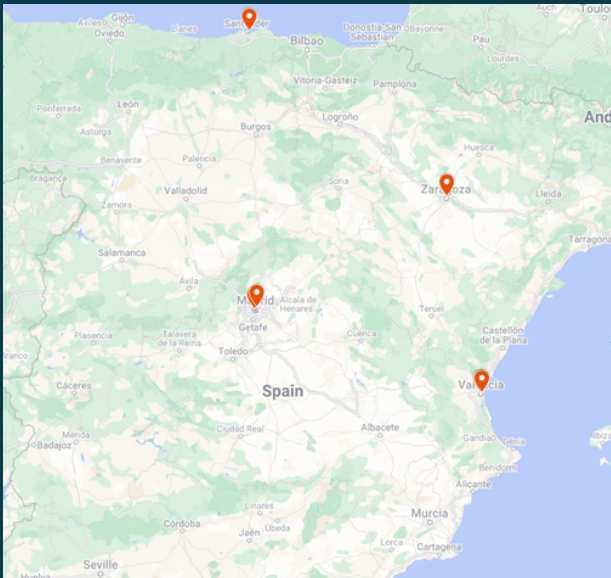


Figure 15. Spain-UK TNE Activity



4.2.1.2 UK TNE in Greece

In Greece, 35 formal UK TNE partnerships are operating in 22 Greek institutions. The University of East London leads in terms of UK TNE registrations, boasting around 3,875 enrolments according to HESA information. The subjects offered by TNE partnerships in Greece are predominantly in the fields of business and management, and healthcare and allied sciences. Moreover, programmes in computer science and arts and design garner significant interest among students. The University of Sheffield has a branch campus located in Thessaloniki, Greece (see figure 14). Thessaloniki and Athens host a greater number of universities collaborating with UK partners compared to other regions in Greece.

4.2.1.3 UK TNE in Spain

In Spain, there are 16 formal UK TNE partnerships in collaboration with 22 Spanish institutions. The University of Wales Trinity Saint David records the highest number of UK TNE registrations, reaching approximately 1,315 enrolments. Subjects provided by TNE partnerships in Spain are primarily focused on business and management, and media and communication disciplines. Barcelona, Madrid and the area around Malaga are popular university spots for this TNE activity.

4.2.2 Non-UK TNE in France, Greece and Spain

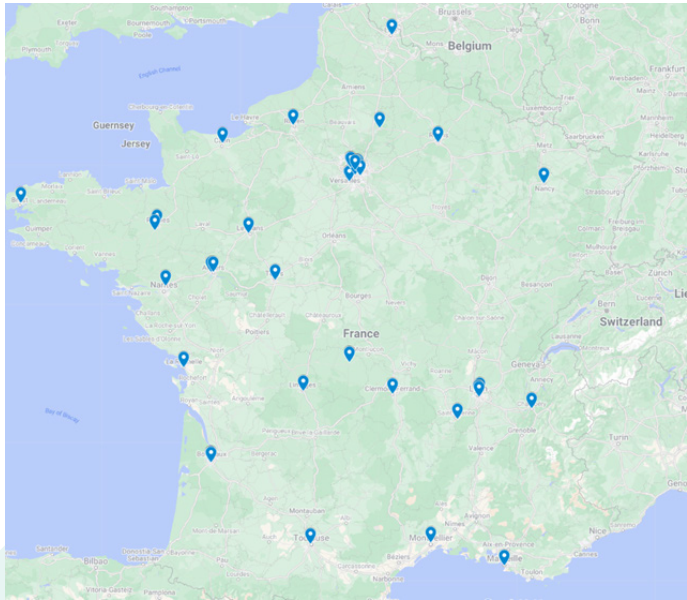
Almost all non-UK TNE partnerships in France and Spain are in the form of double degrees – these typically involve a student pursuing two degrees simultaneously, often in partnership with a foreign university or institution. The awarding bodies usually include the French or Spanish institution and the partner institution(s) abroad. Each institution involved in the programme is responsible for awarding the degree(s) associated with its academic programme. These programmes offer students the opportunity

to gain expertise in two different academic fields or disciplines, as well as exposure to different cultures and educational systems by studying abroad. In such programmes, students usually spend a portion of their academic tenure abroad, where they complete coursework, research or internships at the partner institution. The specific structure and requirements of double or dual degree programmes can vary depending on the institutions involved and the fields of study chosen by the student.

4.2.2.1 Non-UK TNE in France

In France, a total of 452 TNE partnerships with non-UK universities were discovered, facilitated by 45 French institutions. Like UK provision, there is a clustering of non-UK TNE provision in and around Paris. Beyond the UK, Canada boasts the highest number of TNE partnerships, with 48 Canadian institutes collaborating, trailed by the United States with 40 institutes and Brazil with 37. Predominantly, postgraduate programmes are favoured, with engineering and computing science emerging as the most prominent disciplines. Business and management, information technology, and finance and economics also hold significant appeal. Three non-UK IBCs operate in France, all from the US; Parsons School of Design, The New School; Schiller International University; and Georgia Institute of Technology (see figure 16).

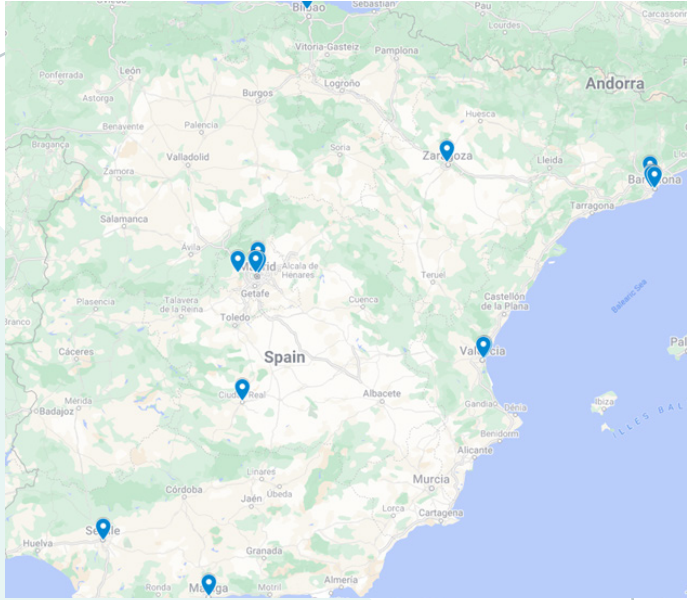
Figure 16. France – Non-UK TNE activity



4.2.2.2 Non-UK TNE in Spain

In Spain, 49 non-UK TNE partnerships were pinpointed, administered by 18 Spanish institutions. TNE partnerships involve numerous international collaborations with universities from various countries, including France, the United States, Germany and China. Notably, France leads with 16 partnerships, indicating a strong academic connection between Spanish and French institutions. Prominent fields of study in these partnerships include business management, law, engineering and sciences. For example, the Universitat Autònoma de Barcelona has multiple double degree arrangements with Thompson Rivers University in Canada, offering programmes in biology, chemistry and microbiology. Similarly, IE Business School collaborates with prestigious American universities such as MIT, Yale and Brown for double degrees in business management. Tuition fees and course specifics vary widely, reflecting the diverse academic offerings and institutional standards. Six non-UK IBCs operate in Spain, four from the United States and two from France. Of the six, three are in Madrid: ESCP Business School Europe; Saint Louis University; and Schiller International University.

Figure 17. Spain – Non-UK TNE activity



4.2.2.3 Non-UK TNE in Greece

In Greece, the study identified five non-UK TNE partnerships involving two Greek institutions, all operating as franchises. Aside from the UK, only universities from Cyprus and the US engage in TNE in Greece, with a focus primarily on business and management disciplines. Two non-UK IBCs operate in Greece: SUNY Empire State College and City Unity College, both from the US.

Figure 18. Greece – Non-UK TNE activity

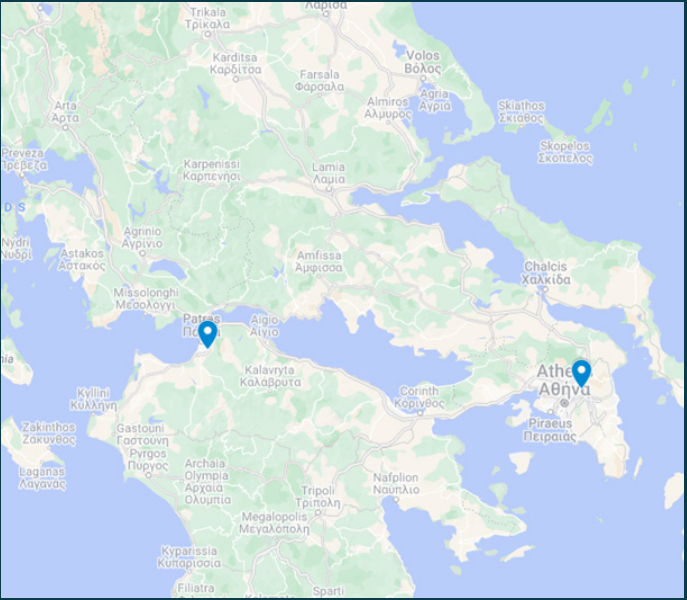
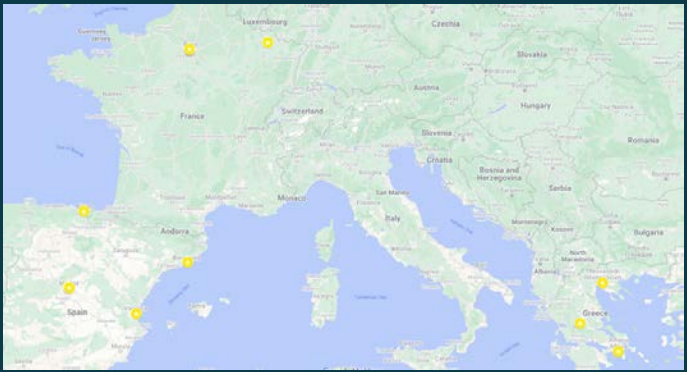


Figure 19. International branch campuses in France, Greece and



The results obtained from the mapping exercise mirror the accessible facts that underwent verification. Desk research encompassed investigations into higher education institutions in France, Greece and Spain and their partner nations. Instances where information couldn't be confirmed were omitted from the records. It's important to acknowledge that numerous partnerships lack comprehensive information, particularly concerning fees. Hence, the final compilation of TNE partnerships in Annexes might not encapsulate the entirety of TNE activities.



Primary research findings

5

This section provides detailed analysis of the findings from the survey, interviews and online community.

The survey was answered by 1,355 students on TNE programmes across France, Greece and Spain. Twenty-eight per cent of the respondents were studying on UK TNE programmes in the 2023/24 academic year, with the remaining respondents on non-UK TNE programmes. Further qualitative research was undertaken via interviews with seven students in France, four students in Greece and five students in Spain. A further four students were engaged in an online community in Greece.

5.1 Survey sample

The overall sample is segmented by country, delivery mode, domicile (i.e. home or international student) and level of study.

The sample is not directly representative of the overall number of TNE students in each country, nor of numbers by delivery mode or level of study. The sampling method is similar to convenience sampling in that it accounts for ease of access to survey respondents and their availability to answer the survey.

As TNE students (whether home or international) are a relatively small sub-set of the overall higher education student population in any given country, they can be considered as a hard-to-reach population to sample. There is a large body of research on TNE related to policy and operating environments, but **relatively little on TNE from the student perspective, concerned with their motivations and drivers to undertake foreign degree study by TNE**. Quotas could not be set to reflect the exact distribution of TNE students studying in France, Greece and Spain. Even the UK TNE information drawn from the HESA Aggregate Offshore Record does not allow further analysis of distribution according to age, gender, domicile or discipline of study. As such, any findings from the survey should be considered as exploratory rather than conclusive.

By country		
France	406	30%
Greece	513	38%
Spain	436	32%

By home / international		
Home	1049	77%
International	306	23%

Figure 20. The overall survey sample, segmented by country, delivery mode, domicile and level of study.

The sample included students enrolled in UK TNE programmes and other countries’ TNE programmes, including those provided by HEIs from the US, Germany, Italy, France and Canada (figure 21 shows the top ten TNE awarding countries for students surveyed in this project). The main segmentations for the analysis as shown in figure 20 below include location of study (France, Greece or Spain), the delivery mode of TNE (branch campus, collaborative provision or online or distance learning), original domicile of student (i.e. whether they are a home or international student) and level of study (undergraduate or postgraduate).

In terms of the diversity of the sample, 52 per cent of respondents were male compared to 48 per cent female. Twenty per cent of respondents were between the ages of 18 and 24, 33 per cent between the ages of 25 and 34, and 47 per cent over the age of 35.

TNE students from branch campuses were the majority of respondents in the survey, despite the fact that we know that there are far higher numbers of TNE students in collaborative provision. Furthermore, Greece hosts significantly higher UK TNE enrolments than France and Spain; across the three countries, Seventy-five per cent of TNE students are in Greece. However, to provide a balance in the findings across the three markets, the survey was distributed approximately equally across the three markets.

By delivery mode		
Branch campus	592	44%
Collaborative provision	433	32%
Online / distance learning	330	24%

By level of study		
Postgraduate	782	58%
Undergraduate	573	42%

Most survey respondents were postgraduates and almost a quarter of respondents were international students studying TNE. The survey sample was also distributed across different awarding countries for the TNE programme. As figure 21 below shows, 28 per cent of respondents were studying for a UK TNE award, and 18 per cent were studying for a US TNE award.

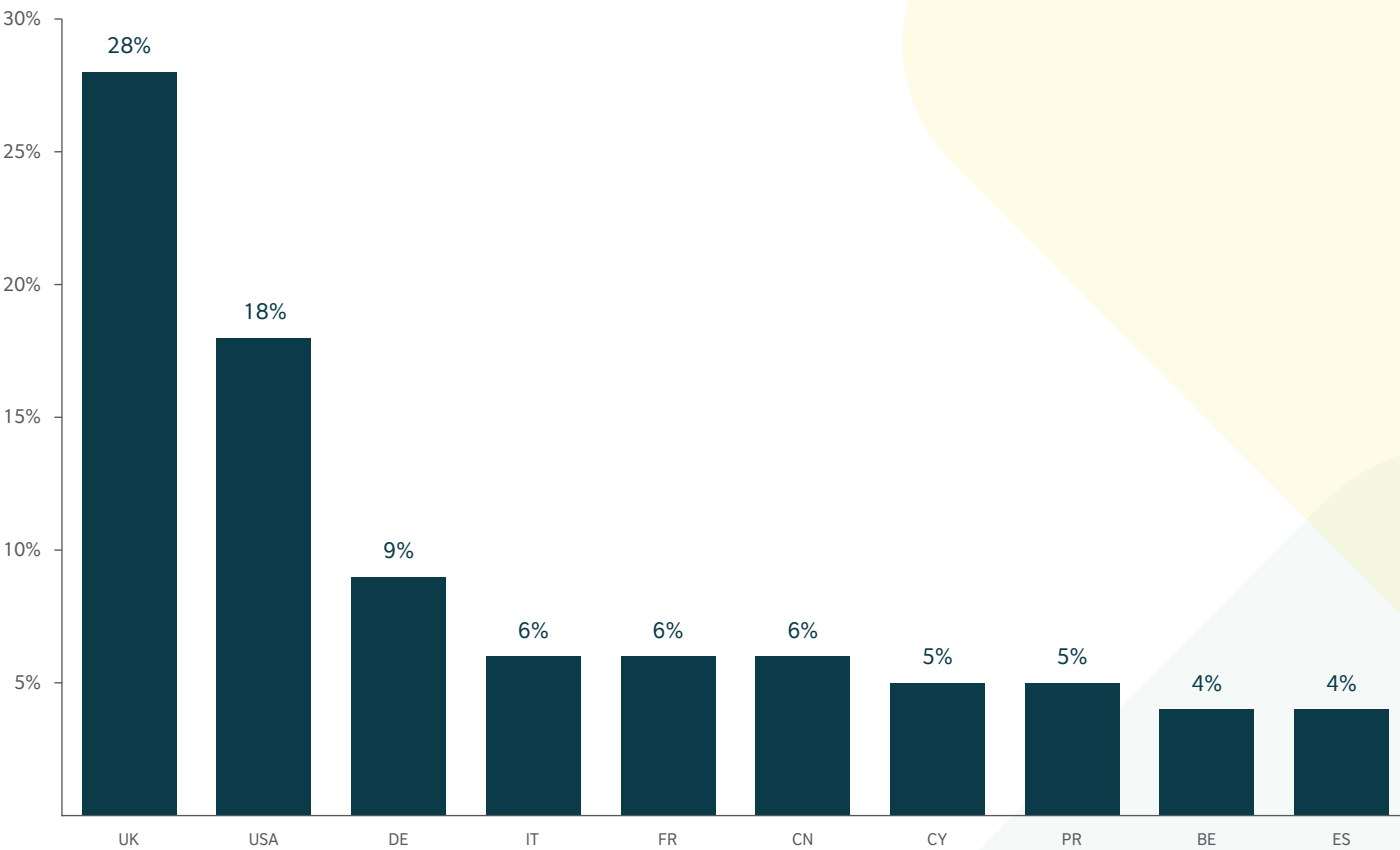


Figure 21. Percentage of survey participants’ TNE programmes (country of the awarding institution).

Respondents from Greece had the highest proportion of those studying for a UK TNE award (35 per cent), followed by Spain (27 per cent) and France (21 per cent). In all three countries, US TNE programmes were the second most popular for survey respondents, with the highest proportion in Spain (21 per cent). In France, Canadian and Belgian TNE were the joint third most common among survey respondents. For Greece, Cypriot TNE was the third most popular. In Spain, French TNE was the third most popular. Overall, there was significant diversity in the origin countries of the TNE programmes that survey respondents were studying on.

5.2 Principal research findings

5.2.1 Why students choose TNE programmes

This section analyses questions from the survey that probed the broader reasons for students choosing to undertake a TNE programme.

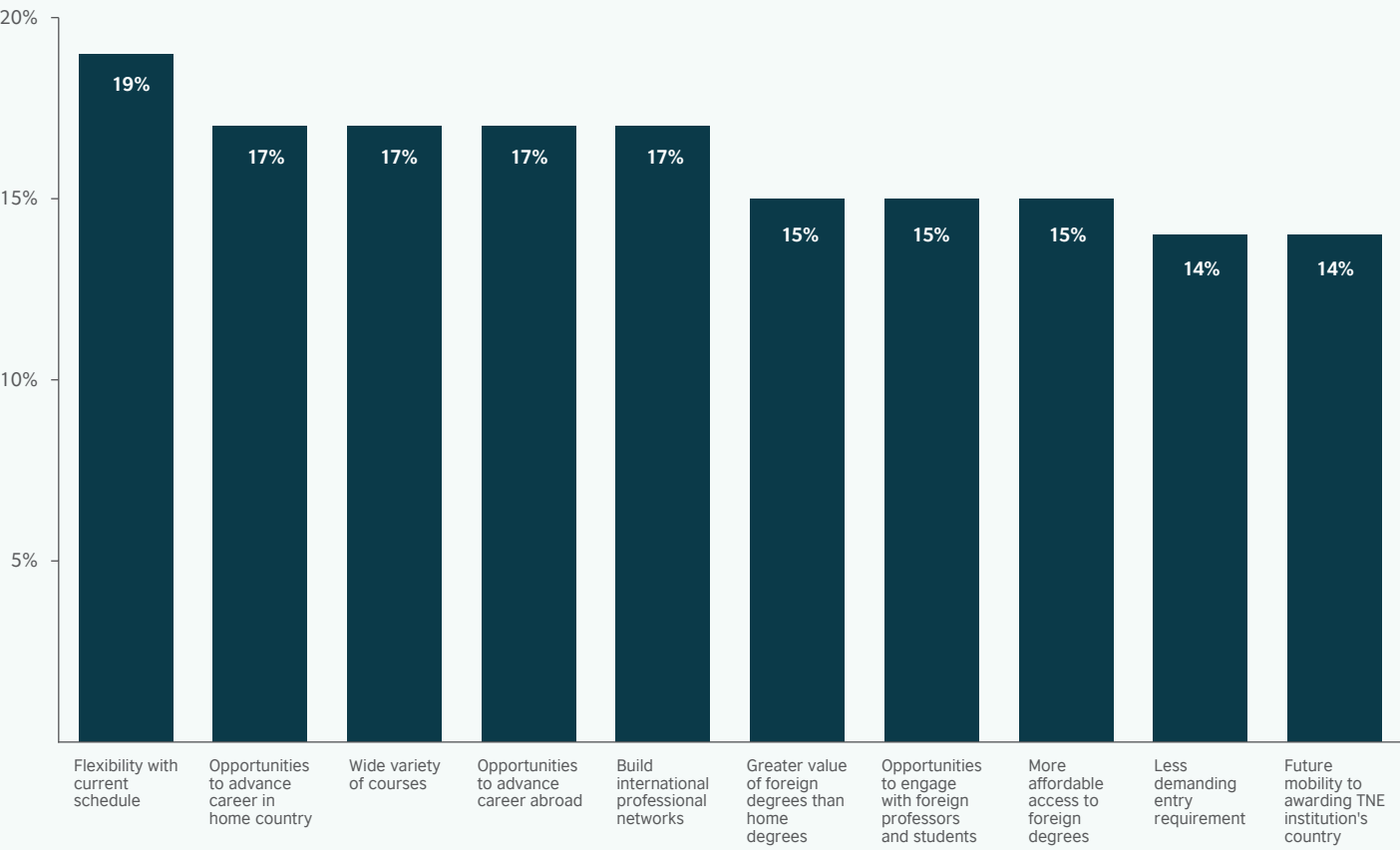


Figure 22. Top ten reasons for choosing a TNE programme in France, Greece and Spain.

The ten most common responses from the survey across all three countries as to why students had chosen a TNE programme related to flexibility, opportunities to advance careers (at home and abroad), wider variety of courses and the potential to build international professional networks, as shown in figure 22 above. However, there was variation in the reasons between each country.

For students on TNE programmes in France, the most common response related to affordability of international education; TNE programmes provide a more affordable way of getting an international degree. The second most common response for students on TNE programmes in France was related to the perceived higher value of an international degree versus a home degree for career prospects.

For students on TNE programmes in Spain, the most common reason given for choosing TNE was that it offers a wider variety of courses. For students on TNE programmes in Greece, the joint most common responses were related to flexibility and building international professional networks.

The following charts show further core reasons for students choosing TNE programmes, according to whether they are a 'home student' (for example, a French student undertaking a UK TNE programme in France) or an 'international student' (for example, a Spanish student undertaking a UK TNE programme in France).

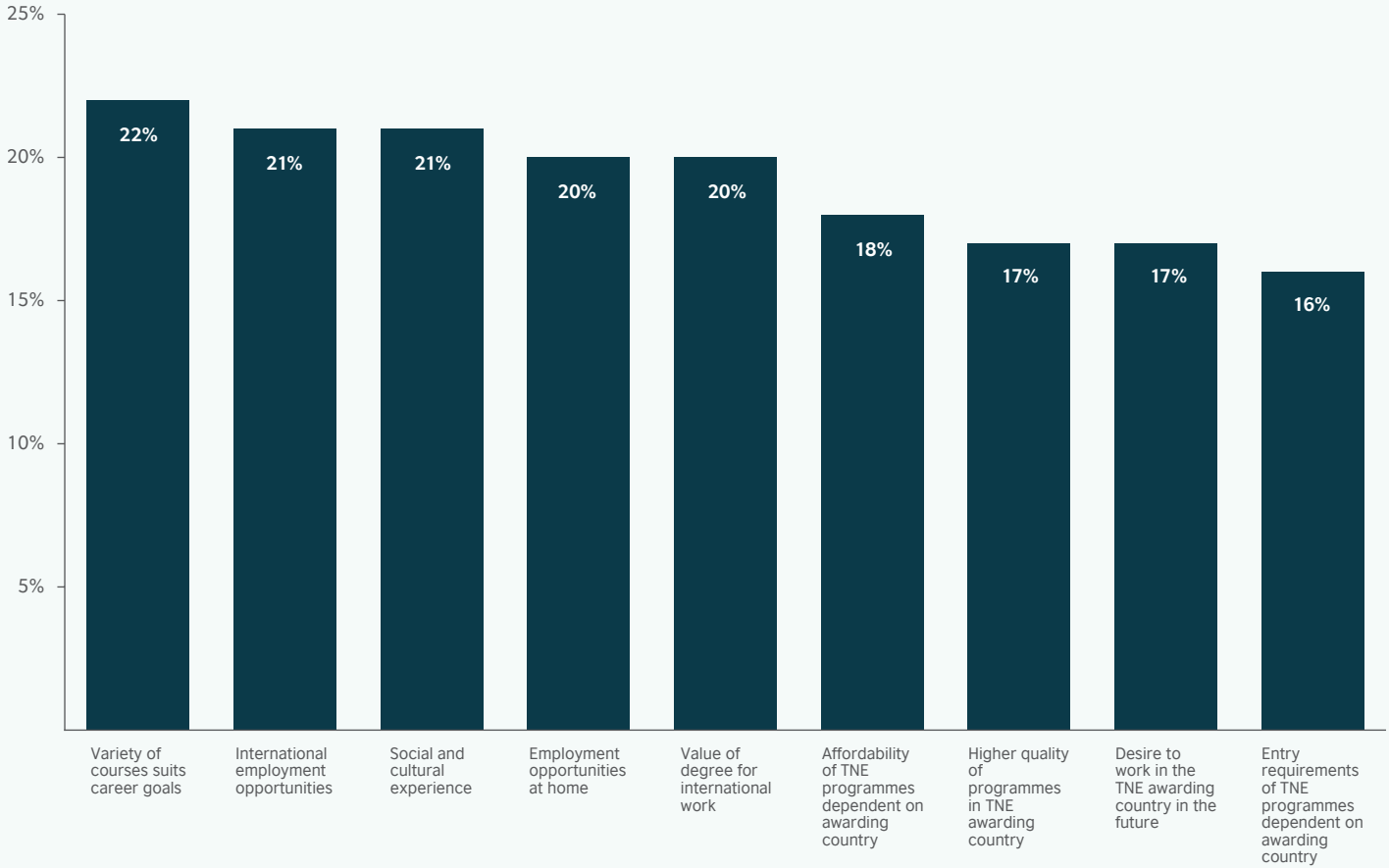


Figure 23. Top reasons for choosing a TNE programme from a particular awarding country (e.g. why the student has chosen a UK TNE degree instead of a US TNE degree).

Figure 23 shows the top reasons for choosing TNE. For this question, responses mainly highlighted the value of TNE degrees in terms of career opportunities, with four of the top five reasons being directly related to TNE furthering personal opportunities for employment, either at home or abroad.

While the survey results are indicative rather than conclusive, there is evidence to suggest that benefits to career progression are a major driver for students undertaking TNE programmes. Although flexibility is the most cited reason for students choosing TNE in general, career-based reasons were very close behind. Responses to the question on why students chose to undertake TNE from a specific country, such as the UK, reaffirmed that career motivations are central to the appeal of TNE.

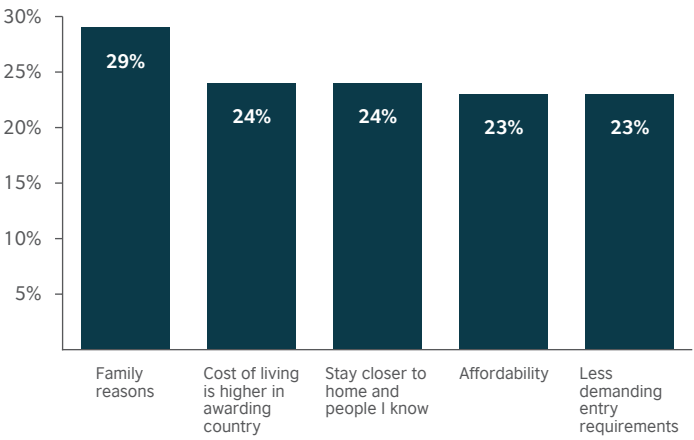


Figure 24. The top five reasons students choose TNE degrees in their home country.

As figure 24 shows, **the most common reason for students to choose TNE in their home country was to stay close to their family while benefiting from getting a foreign degree.** A related reason was staying closer to home and people they know, such as their friendship circle. There were also two reasons related to cost: first, the cost of living was noted as less expensive in the students' home country compared to the awarding country; and second, the cost of the TNE degree was perceived as less expensive than a degree studied directly in the awarding country. The final reason was the less demanding entry requirements for TNE degrees compared to degrees in the awarding country.

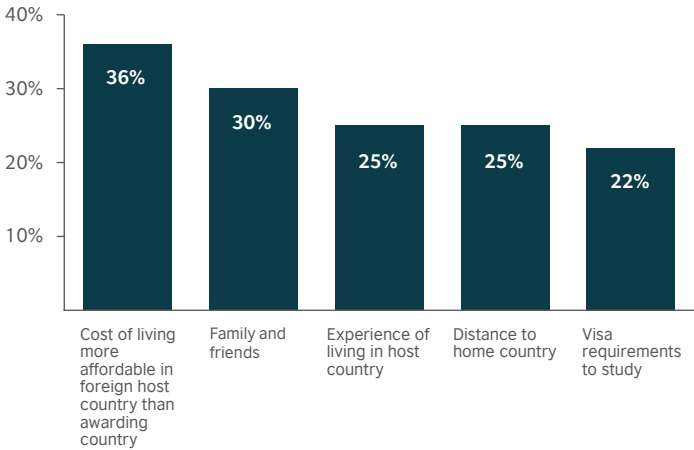


Figure 25. The top five reasons student choose to do a TNE degree abroad.

As figure 25 shows, the most important reason to study a TNE degree abroad among the students surveyed was that the cost of living is more affordable in the foreign host country compared to the awarding country. Other important reasons included having family or friends in the host country, the cultural experience of living in the host country, the proximity of the host country to the student's home country and that visa requirements to study in the host country were easier than in the awarding country.

It can be summarised that there are three 'buckets' of motivating reasons why students choose TNE degrees. First, reasons related to **proximity to family or the home environment**; second, reasons related to **affordability and costs**; and third, reasons related to **future career and life prospects**. These vary depending on the host country of TNE and whether the student is home-based or international.

5.2.2 Motivations for choosing UK TNE programmes

5.2.2.1 Variety and quality of courses on UK TNE programmes

Across multiple segmentations, UK TNE programmes demonstrated a greater reputation for variety and quality of courses in comparison with non-UK TNE programmes. Overall, 27 per cent of respondents chose UK TNE programmes due to the variety of courses offered, compared to 20 per cent for non-UK TNE programmes. Eighteen per cent of respondents chose UK TNE for the perceived higher quality of programmes, compared to 16 per cent for non-UK TNE programmes.

TNE programmes offered by UK institutions are highly valued by students for their diverse range of courses, tailored to align closely with career goals and personal interests. These programmes are noted for offering subjects and modules that may not be as accessible elsewhere. The teaching methodologies in UK TNE programmes are particularly praised by students for their practical approach, boosting skills development relevant to future career paths. UK TNE programmes excel in providing comprehensive educational offerings that attract students seeking both academic excellence and skills development in their studies.

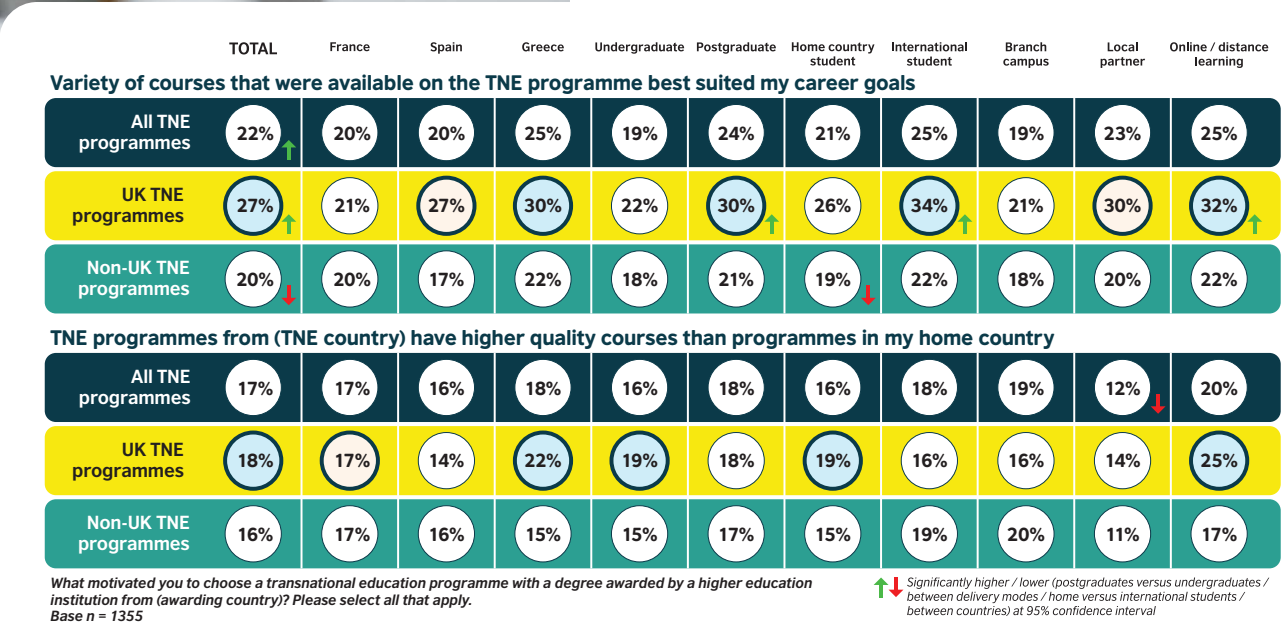


Figure 26. Difference in motivations for choosing UK or non-UK TNE programmes, focusing on variety of courses and perceived quality of courses.

As figure 26 shows, when **segmented for each individual country**, the differential between UK and non-UK TNE in terms of variety of courses was highest in Spain (ten percentage points difference) and Greece (eight percentage points difference). For perceived higher quality of courses, the greatest differential for UK and non-UK TNE was Greece (seven percentage points). Bucking the trend, a higher proportion of respondents on TNE programmes in Spain said they were motivated by higher quality courses of non-UK TNE (16 per cent) than for UK TNE (14 per cent).

Segmentation by undergraduate and postgraduate students also reveals that a higher proportion of students were motivated to choose UK TNE than non-UK TNE based on variety of courses on offer. The greatest differential was among postgraduates; 30 per cent of postgraduate students on UK TNE programmes were motivated by a greater variety of courses compared to 21 per cent of students on non-UK TNE programmes. In terms of perceptions of higher quality, there was a greater differential between UK TNE and non-UK TNE for undergraduates (four percentage points) compared to postgraduates (one percentage point). The survey information suggests that for postgraduate motivations, the greater variety of courses in UK TNE was more important than the perceived higher quality.

Segmentation by home or international student reveals that both home and international students on TNE programmes in France, Greece and Spain were motivated to choose UK TNE programmes due to the variety of courses on offer to a considerably greater extent than those on non-UK TNE programmes. For home students on TNE programmes, the differential between UK TNE and non-UK TNE was seven percentage points, and for international students it was 12 percentage points. In terms of the perception of higher quality of a TNE programme, a greater proportion of international students on non-UK TNE programmes selected this reason (19 per cent) compared to those on UK TNE programmes (16 per cent). This suggests that for students on UK TNE programmes, the overall variety of courses offered by TNE programmes was seen as more important than the perceived higher quality of TNE programmes.

The final segmentation relates to mode of delivery. For all three modes of TNE delivery – international branch campus, collaborative provision and online learning – a greater proportion of UK TNE students chose variety of courses on TNE programmes as a motivating factor than non-UK TNE students. There were considerable differentials on this measure between UK TNE and non-UK TNE students for collaborative provision (ten percentage points) and online learning (ten percentage points). For perceived higher quality of courses, there was a higher proportion of UK TNE students choosing this as a motivating factor than non-UK students in all modes of delivery except international branch campus, where there was minor differential in favour of non-UK TNE students. For the online learning mode of delivery, there was an eight percentage point differential in favour of UK TNE students choosing perceived higher quality as a motivating factor.

In summary, across almost all segmentations, **more UK TNE students chose variety of courses as a motivating factor to undertake their TNE programmes** than their non-UK TNE counterparts, with particularly higher differentials for students on TNE programmes in Greece, international students, postgraduate students and students studying by online modes. For the perception of higher quality as the main motivating factor, there was less difference between UK TNE and non-UK TNE students, except among students on TNE programmes in Greece and students on online TNE programmes.

Interviews with students also demonstrated that variety of courses – and visibility of the variety of courses – was a motivating factor. In one example, a student from Spain commented that academic modules in marketing were available in a UK TNE programme in Spain within a business and administration course, showcasing the flexibility of UK taught provision in a TNE environment. UK course offerings typically feature a wider range of modules that give a competitive edge against other TNE programmes or local HEIs in their respective countries. This variety of modules allows students to tailor their education more closely to their career goals and interests.

‘UK-based transnational programmes are the best as far as it comes to Europe. And I don’t think I would have considered any American-based ones because they have quite a different curriculum.’

Undergraduate international student from Albania studying in Greece (in-person interview).

5.2.2.2 UK TNE programmes are perceived to offer better employability opportunities both at home and abroad

The survey results show that students perceive TNE programmes to offer better employability opportunities in their home country and abroad than if they were doing a degree from their home country. As figure 27 shows, 20 per cent of survey respondents were motivated to study on their TNE programme as they felt it offered good employment opportunities in their home country, and 21 per cent of respondents felt it offered good employment opportunities internationally.

These proportions were higher for UK TNE students (26 per cent for home employment opportunities and 25 per cent for international employment opportunities) than for non-UK TNE students (18 per cent and 20 per cent respectively). These significant differentials suggest that UK TNE students place greater value on the potential employability of a UK degree than non-UK TNE students do on their non-UK degree.

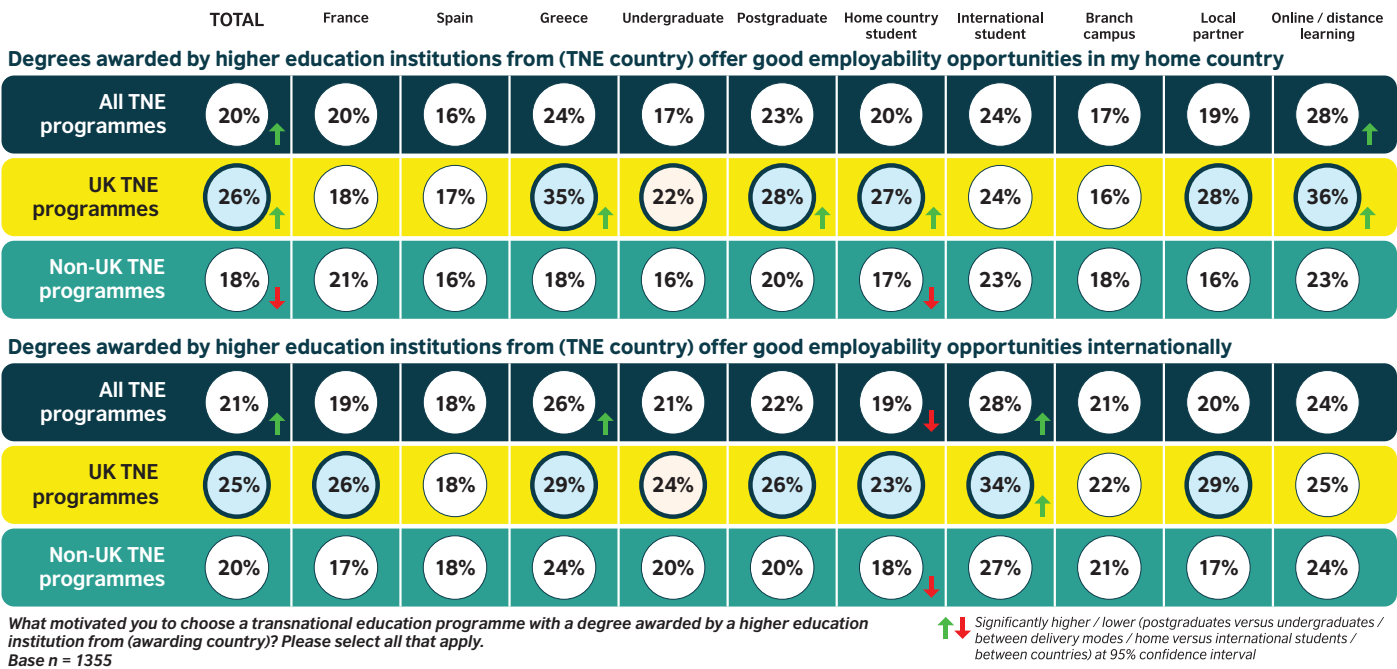


Figure 27. Difference in motivations for choosing UK or non-UK TNE programmes, focusing on perceived employability at home and internationally.

Segmenting these survey results by country, figure 27 shows that students on UK TNE programmes in Greece had the strongest perception that UK TNE has good employability both at home and internationally. In terms of employability at home, this was 17 percentage points higher than students on non-UK TNE programmes in Greece. The gap between students on UK TNE and non-UK TNE in Greece was narrower when it came to perceptions of how TNE can support international employment opportunities, but wider for students on TNE programmes in France; in other words, students on TNE programmes in Greece were more likely to feel that UK TNE supports their employment prospects at home, whereas students on TNE programmes in France were more likely to feel UK TNE supports their prospects internationally in comparison to non-UK TNE. There was relative parity for students on UK and non-UK TNE programmes in Spain for this segmentation.

Segmentation according to level of study shows that a greater proportion of both undergraduate and postgraduate UK TNE students were motivated by employment opportunities at home and abroad than non-UK TNE students. This was particularly true for postgraduate students, with UK TNE postgraduate students being motivated by future home employment considerations eight percentage points higher than non-UK TNE students.

Segmentation according to home or international status likewise reveals that whether the TNE student was home or international, their level of motivation to choose UK TNE for employability reasons was higher than it was for those who chose non-UK TNE. The perception that the degree would improve employability at home was seven per cent higher amongst home-based students on UK TNE compared to home-based students on non-UK TNE programmes.

Similarly, the perception that they would be more employable internationally was seven percentage points higher among international students on UK TNE programmes than it was for international students on non-UK TNE programmes.

Finally, when segmenting by mode of delivery, the survey results demonstrate that a higher proportion of UK TNE students were motivated by employability considerations than non-UK TNE students. There were particularly significant differentials between UK TNE and non-UK TNE students for employability at home considerations in online learning modes of delivery (13 percentage points) and collaborative provision (12 percentage points), and for international employability considerations in collaborative provision (12 percentage points).

Across all segmentations, there was a higher proportion of UK TNE students selecting their programmes due to employability at home and abroad motivations than non-UK TNE students.

Interviews with students and the online community with Greece-based TNE students also highlighted that the appeal of TNE programmes (in particular UK TNE) lay in their ability to improve employability and offer globally recognised and accredited qualifications. UK TNE programmes were perceived to offer courses and modules that were more relevant to students’ career aspirations compared to programmes from other countries.

‘I didn’t like it [the USA course], I found out that it wasn’t very good... It wasn’t computer science. It was ‘computer science business’. It was related to informatics but it wasn’t actually programming. It was more on the business side.’

Undergraduate international student from Romania studying in Greece (in-person interview).

To expand on this, students explained that they perceived UK TNE programmes as beneficial for career advancement for the following reasons:

- **Reputation and global recognition:** UK TNE allows the student to attain a degree from a reputable institution, and so the TNE programme adds prestige and recognition to a student’s qualifications, making them more attractive to potential employers.
- **English language advantage:** The English language proficiency gained by enrolling on a UK TNE programme is an added advantage for students planning to work in an international environment.

English is seen as a language that can be used globally, and students enrolled on a TNE programme often have a strong pre-existing understanding of it.

‘More of the opportunity of being able to go to maybe the UK after I finish my studies. I’m not sure if I want to continue with my dad’s business. So, I want to maybe go to other countries... English-language-talking countries.’

Undergraduate home country student studying in Spain (in-person interview).

5.2.2.3 Social and cultural experiences

Students on both UK and non-UK TNE programmes showed that they valued the potential social and cultural experience derived from studying on a TNE programme; the same proportion of 21 per cent of students from UK and non-UK TNE indicated that this was a motivating factor.

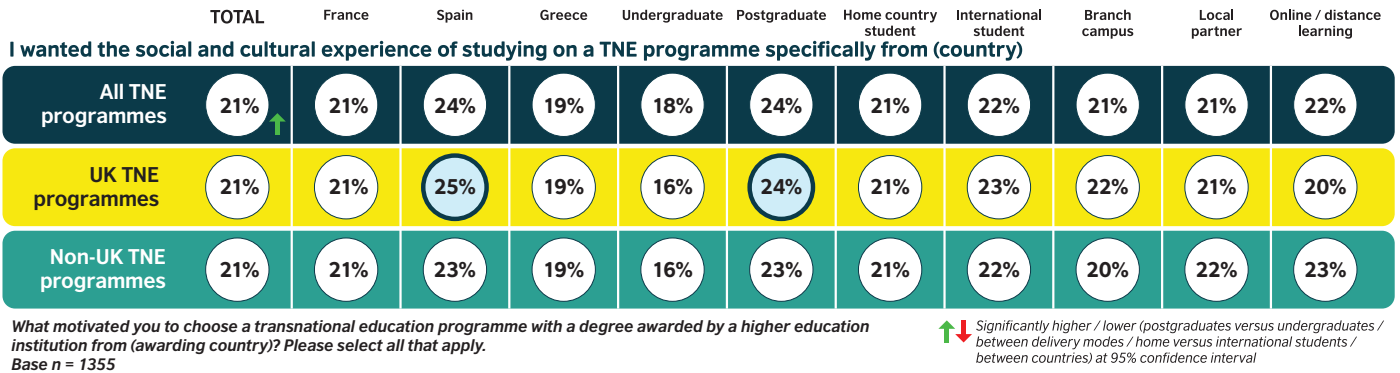


Figure 28. Difference in motivations for choosing UK or non-UK TNE programmes, focusing on social and cultural experiences.

Compared to the two previous motivations, there was greater similarity across different segments and between the proportion of UK TNE and non-UK TNE students choosing social and cultural experience as a motivating factor for selecting a TNE programme. In terms of country segmentation, the highest proportion of TNE students selecting social or cultural experience was in Spain (24 per cent), with a marginally higher proportion of UK TNE students selecting this reason compared to non-UK TNE students. It was lowest in Greece (19 per cent).

In terms of level of study, a greater proportion of postgraduate students were motivated to select TNE due to social and cultural experience than undergraduate students, with a differential of five per cent for both UK TNE and non-UK TNE students.

For both domicile- (home or international) and mode-of-delivery-based segmentations, there was little variation in terms of trends for selecting TNE programmes based on potential social and cultural experience. For both UK TNE and non-UK TNE students across these two segments, between 20 and 23 per cent of students were motivated by social and cultural experience reasons.

1. **Immersion in the host country’s culture**
Experiencing local lifestyle, traditions and social norms; for example, those studying in Greece enjoyed the opportunity to experience Greek culture directly.
2. **Exposure to the awarding country’s culture**
Experiencing the cultural elements of the awarding country embedded in the programme’s curriculum and activities.

‘I found the best of both worlds by having the option to graduate with a degree from a university like the University of York, while also living in a country as beautiful as Greece.’

In-person, postgraduate international student from Lebanon studying in Greece.

Students who were interviewed also highlighted that the cultural and social experience of being on a TNE programme produced a community atmosphere. Both home country and international students highlighted the intimate, familial environment fostered by these campus programmes. This deep feeling of community helped students form close friendships and feel a strong sense of belonging. One student described the experience as feeling like ‘family’, highlighting the positive social dynamics and supportive relationships that develop on TNE programmes. This can be attributed to the fact that TNE programmes generally have smaller classes than larger universities in students’ home countries.

Overall, the findings show that TNE programmes can provide unique cultural and social experiences that go beyond what traditional higher education programmes offer. The supportive community environment further complements the overall student experience, making TNE programmes a highly attractive option for those seeking a comprehensive cultural education.

5.2.2.4 Developing international professional networks

The survey results showed that the chance to develop international professional networks was a motivating factor in choosing TNE programmes for students, with 17 per cent of respondents choosing this. The proportion was higher for those students on UK TNE programmes (20 per cent). There were other variations according to segmentation.

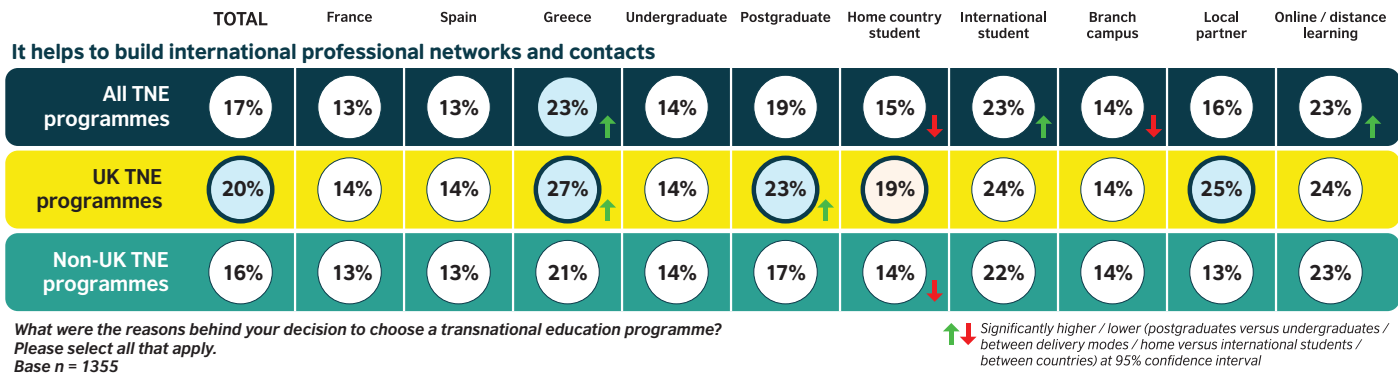


Figure 29. Difference in motivations for choosing UK or non-UK TNE programmes, focusing developing professional networks.

Figure 29 shows that when segmenting by country, students on TNE programmes in Greece were significantly more motivated by the chance to develop professional networks than those in France or Spain, by a ten percentage point differential. This was even higher specifically for UK TNE students in Greece, with 27 per cent of respondents highlighting building international professional networks as a crucial motivating actor.

Segmentation at level of study shows that a higher proportion of postgraduates on UK TNE programmes were motivated by developing international professional networks than those on non-UK TNE programmes.

For the domicile and mode of delivery segments, a consistently higher proportion of students on UK TNE programmes highlighted international professional networks as a motivating choice than students on non-UK TNE programmes. There was a significant differential between UK and non-UK TNE for those on collaborative provision (12 percentage points differential) compared with international branch campus or online learning (one percentage point differential).

The survey results indicate that UK TNE students saw developing international professional networks as a more

important motivating factor for choosing their UK TNE course than did non-UK TNE students choosing their non-UK course. The difference was especially clear among students based in Greece, home students and those on collaborative provision TNE programmes.

Students on UK TNE programmes highly valued the chance to build professional networks and contacts from the UK. It was clear that the institution providing the TNE programme was playing a crucial role in connecting students to industry experts and guiding their career development. Additionally, students described how they could engage with professors, peers and alumni from other countries, which were seen as a valued part of the networking offered by the programme.

‘The main skills I aim to acquire concern networking. My programme affords me with a multitude of opportunities to associate with alumni and professionals in my field that have invaluable advice to offer as well as companies partnering up with my university for networking events which I fully plan to take advantage of to enhance my communication skills.’

In-person, undergraduate home country student studying in Greece.

‘If you take part in a TNE programme, you could have access to interesting academics that have links to other institutions around the world, and that is a selling point.’

In-person, postgraduate international student from the UK studying in France.

5.2.2.5 TNE can offer flexibility for students

The survey shows that flexibility was another reason why the students surveyed had chosen TNE, with 19 per cent of respondents selecting this. Flexibility here refers to students having other commitments, such as employment or family duties, which need to be taken into consideration when choosing courses. It can mean individual students needing to select courses that do not clash with those external commitments.

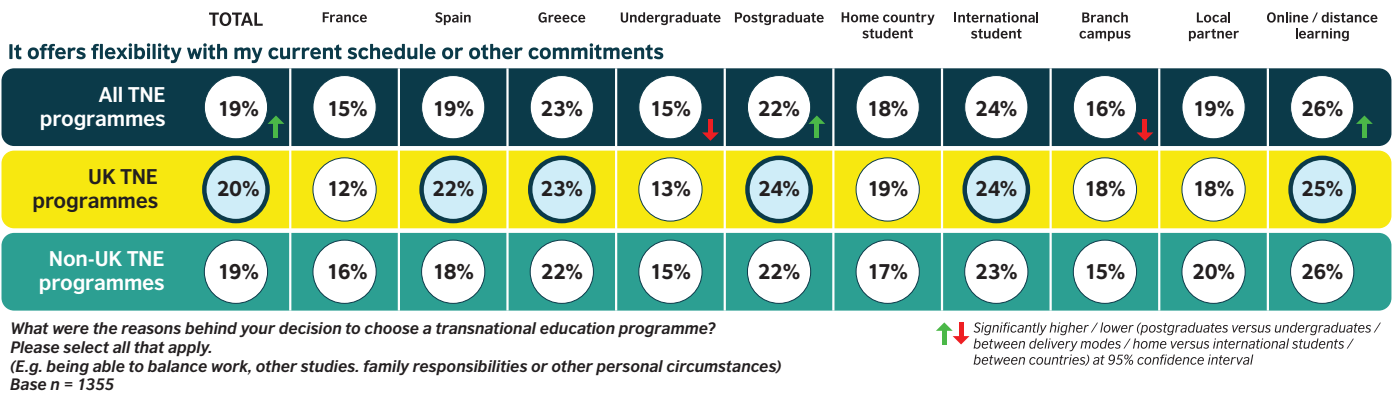


Figure 30. Difference in motivations for choosing UK or non-UK TNE programmes, focusing on flexibility.

Figure 30 shows that by country segmentation, there were significant differences in terms of TNE students identifying flexibility as a reason to choose TNE. Twenty-three per cent of UK TNE students in Greece selected flexibility, compared to just 12 per cent in France. For non-UK TNE students in Greece, 22 per cent selected flexibility compared to 16 per cent in France.

There were also variances in the level of study segmentation, with 24 per cent of UK TNE postgraduate students selecting flexibility compared to 13 per cent of UK TNE undergraduates. There were similar proportions between postgraduate and undergraduate non-UK TNE students.

In the domicile segmentation, the proportion of international TNE students selecting flexibility was higher than home-based TNE students, by six percentage points.

For the mode of delivery segmentation, students on online learning programmes for both UK TNE and non-UK TNE programmes accounted for the highest proportion selecting flexibility across the different modes of delivery.

The information shows that flexibility can be a crucial motivating reason for selecting TNE programmes, with less variation between UK TNE and non-UK TNE students compared to other reasons. Greek- and Spanish-based TNE students, postgraduate students, international students and online-learning students had the highest proportions of students who considered flexibility of TNE programmes to be an important part of their decision-making process.

Interviews with students highlighted that postgraduate students often need to balance family and work commitments alongside their studies, making flexibility an essential factor in their decision making. These students want the ability to manage their studies alongside other responsibilities. Online TNE programmes offer the flexibility to balance studies with other commitments more easily than in-person programmes.

From the online community in Greece, it was also identified that postgraduates studying on an online TNE programme valued the option to watch recorded sessions if they miss live classes. TNE programmes often have flexible start dates, unlike the traditional October start of higher education in Greece. Online TNE programmes typically have year-round start dates.

There was also an appreciation of hybrid models that provide some level of flexibility without sacrificing in-person interaction. Undergraduates interviewed valued the face-to-face mode of delivery and displayed openness to a hybrid teaching model that offered a blend of in-person and online learning. The quotes below demonstrate student attitudes towards the flexibility of online and hybrid programmes.

‘[Studying at] the campus was 100 per cent number one, but if there were something like a hybrid method and if I found something really interesting at a really good university, I could go maybe hybrid.’
In-person, undergraduate, international student from Romania studying in Greece.

‘As I am a mother that works full time, online learning is the only option. Only a few online programmes are offered for my field of education and of course I chose the private college that collaborates with a UK university. Unfortunately, Greek universities do not offer the variety and flexibility and most significantly the high-quality level of education that universities in the UK offer.’
Online, postgraduate home country student studying in Greece.

5.2.3.1 Information sources that were used for TNE programme awareness and consideration

5.2.3.1.1 Awareness

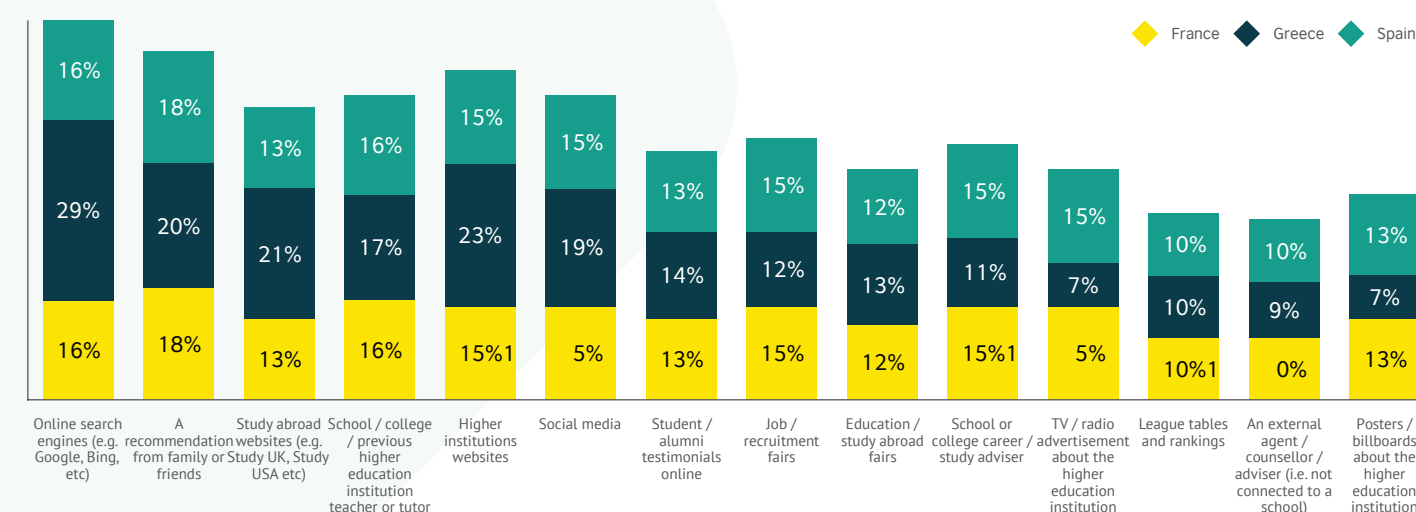


Figure 31. Different platforms engaged by students to learn about the TNE programme, by country

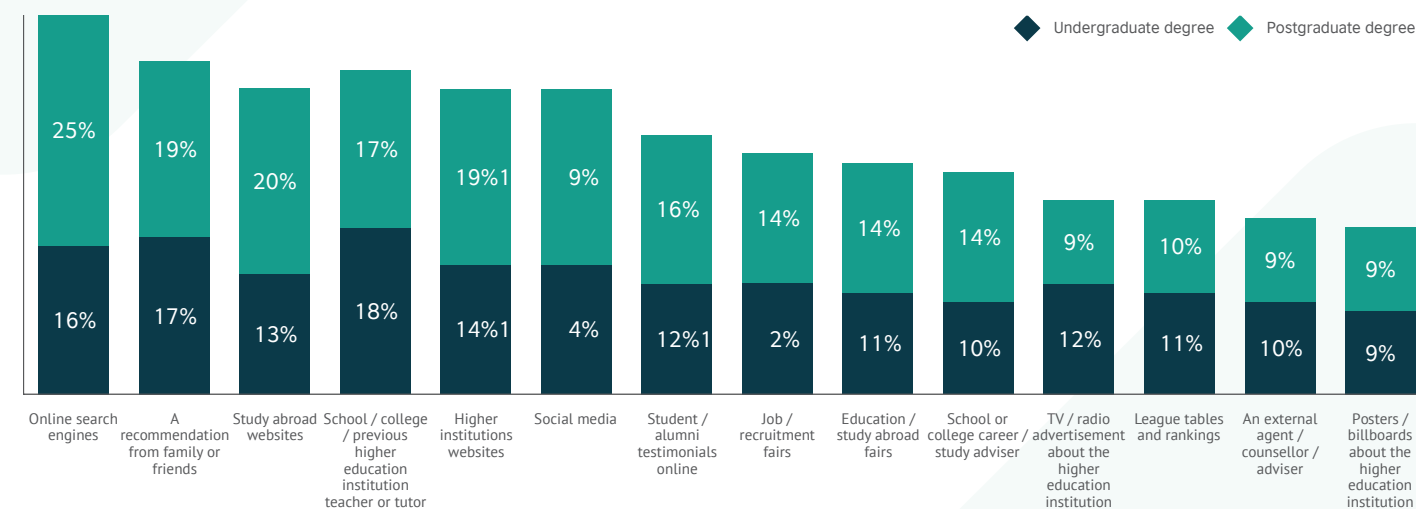


Figure 32. Different platforms engaged by students to learn about the TNE programme, level of study

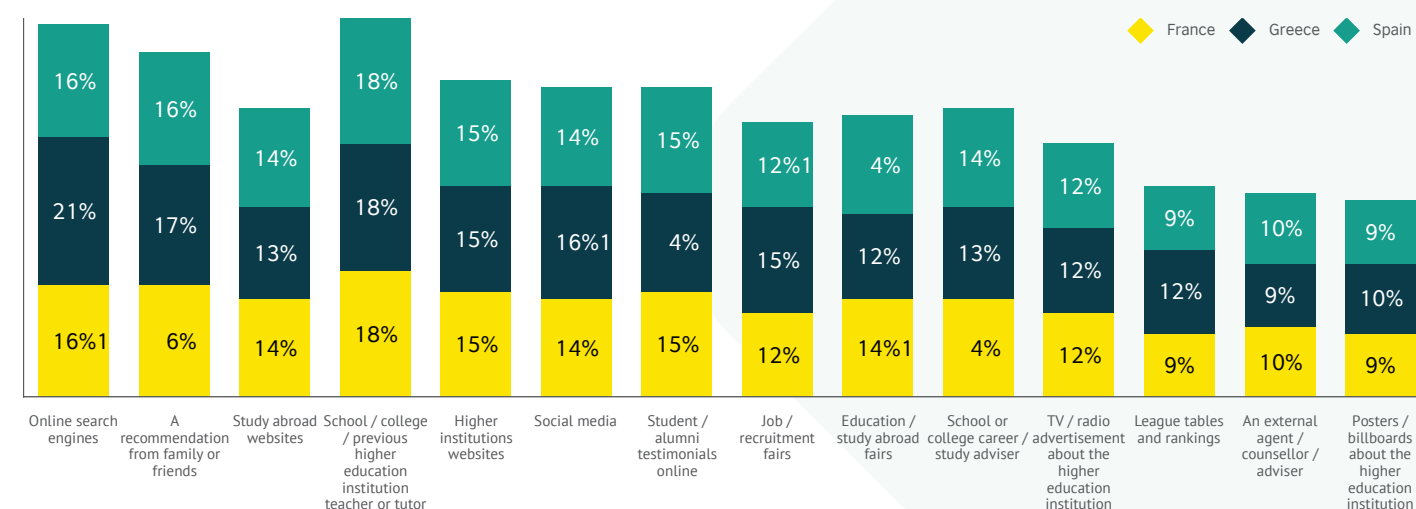


Figure 33. Different platforms engaged by students to learn about the TNE programme, by mode of delivery

5.2.3 Marketing and communication of TNE programmes and the student decision-making journey

From the marketing perspective, the student decision-making journey involves three stages: awareness, consideration and conversion.

Awareness is the initial stage where students first become aware of the possibility of pursuing a TNE programme. This can arise from various sources, such as the internet, recommendations from friends and family, or mentions by educators and peers.

Consideration follows, where students actively research and evaluate different TNE options. They might look into programme details, a university's reputation, location and the financial implications of choosing to study there. At this stage, students might also read testimonials and consult study abroad resources. This stage aims to narrow down study choices to a shortlist of suitable programmes.

Conversion is the final stage, where students make their decision and take tangible steps to enrol. This involves completing applications, preparing documents, interviews and making financial arrangements to secure their enrolment. Successful conversion results in official enrolment in the chosen TNE programme.

Understanding these stages helps the higher education sector effectively attract and support prospective students, guiding them from a stage of initial awareness through to enrolment.

Online research

Online research is fundamentally important for students interested in enrolling on TNE programmes, with the internet offering a crucial resource before enrolment decisions. Approximately 21 per cent of students surveyed said they had used search engines to gather information about their TNE programmes. Students generally find online platforms such as study abroad websites and institution websites trustworthy and effective for researching higher education programmes.

Main trends for online TNE research and awareness

- Both postgraduate and undergraduate students learned about TNE programmes from online search engines, institutions' websites and social media channels, with postgraduate students using this method more frequently than undergraduates.
- Students in Greece showed the highest awareness of TNE programmes via online methods, prominently from search engines, institution websites and study abroad platforms. Students in France demonstrated lower TNE programme awareness online. In Spain, higher education websites were found to be less effective in promoting awareness of the TNE programme.
- Online TNE programmes were predominantly discovered from search engines in comparison to campus-based programmes which tended to be discovered offline from a school, college of previous higher education institution teacher or tutor. Additionally, online programmes were prominently featured on study abroad websites, institution websites and social media channels.

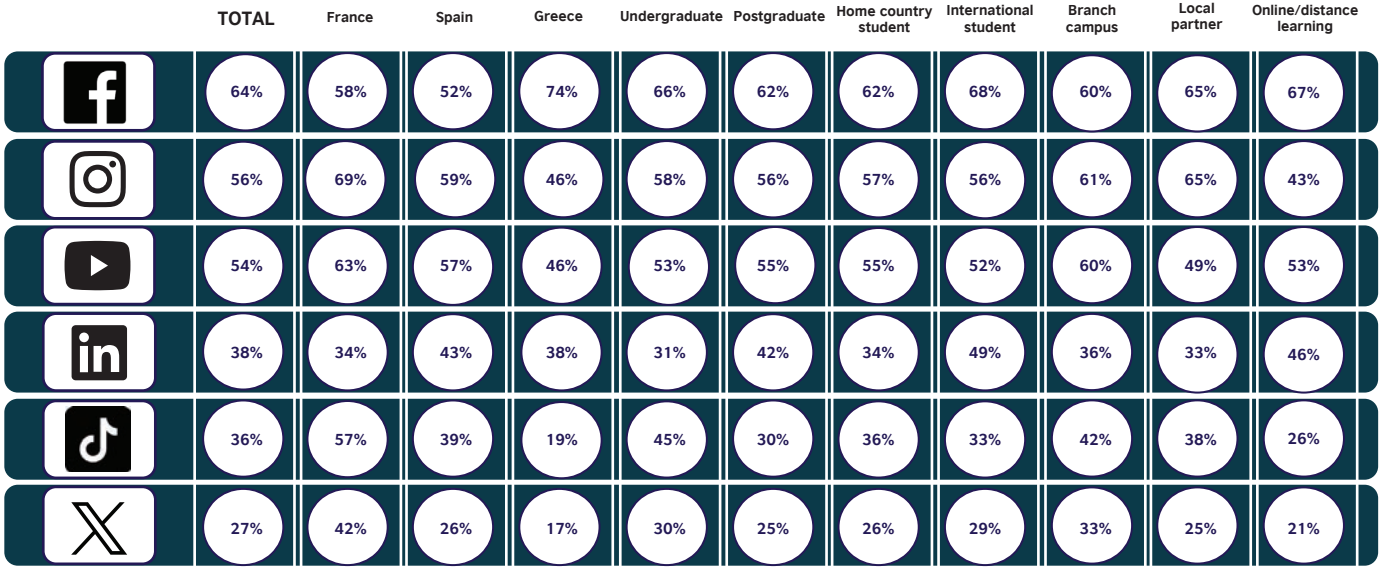
‘I went on the UCAS website. I put in my general [subject] like politics for example. And then I clicked on the map and I look – there’s all these dots pop up in the UK, Northern Ireland and then there was one in Paris and I clicked it and that’s how I found it.’

In-person, undergraduate, international student in France.

Social media usage

From our findings, 17 per cent of students studying on TNE programmes discovered them from social media channels. While this was not the primary source of programme awareness, it was a statistically significant result. It highlights the high potential of social media in generating awareness and consideration for the programme, even though currently there is limited information about TNE programmes on social media.

These findings illustrate the complex and varied role of social media in promoting TNE programmes and emphasise the need for a multifaceted approach in communication and marketing strategies to effectively reach and inform prospective students. A comprehensive strategy would also increase understanding of what TNE programmes offer and maximise reach across the main social media channels.



You mentioned that you used social media channels to search for the transnational education programme you are currently on. Which social media channels did you use? Please select all that apply. Base n = 225

Figure 34. Platform usage among students who used social media.

‘On social media, they do post, but they don’t have that kind of information. If you want more information, you have to call them or go to their website.’

In-person, undergraduate, home country student, studying in Greece.

‘I was looking for programmes online “studying administration programmes in Spain”. Suddenly, I was on Instagram and this popup came up. I saw the programmes and started searching on the web and they had all the information there.’

In-person, undergraduate, home country student, studying in Spain.

5.2.3.1.2 Consideration

Recommendations from family or friends

Word of mouth from trusted people was a major source of TNE programme awareness, with 18 per cent of students learning about their TNE this way. These personal recommendations had exerted considerable influence, especially when originating from relatives who had previously enrolled in similar TNE programmes. The positive experiences of these relatives played a crucial role in shaping the perceptions and decisions of prospective students, becoming even more apparent at the consideration phase.

Main trends for offline TNE awareness

- In France, 18 per cent of students had learned about TNE programmes primarily by recommendations from friends and family.
- In Spain, testimonials from students and alumni (16 per cent) slightly surpassed family recommendations (15 per cent).
- Most undergraduates – 18 per cent – had gained TNE awareness from their schools, colleges or previous teachers.
- In Spain, personal recommendations were more common than online searches for TNE information.

While online channels were crucial for raising awareness of TNE options, personal interactions and trusted recommendations played a crucial role in students seriously considering TNE programmes as a study option.

‘Contacted a few alumni I was aware had graduated from such programmes in the past so as to learn from their experiences.’

In-person, undergraduate, home country student, studying in Greece.

5.2.3.1.3 Conversion

Recommendations from family or friends

Despite the convenience of online resources, the students surveyed preferred to talk to someone directly from the institution at the final stage of their research into TNE programmes. This helped them to fill in information gaps, feel they had an up-to-date picture and trust that the programme was legitimate and well-managed.

Speaking to someone from the higher education institution in the host country enabled students to start building their relationship with the institution. Students reported quicker responses to their queries and described how the institutions gave them personalised attention. **Students spoke highly of institutions providing a positive student service pre-enrolment.** Direct contact with the institution played an important role in converting the students and getting them enrolled onto the TNE programme.

‘In my personal experience, even though I conducted extensive online research, I ended up getting most of the crucial information I needed from my personal meeting with a college representative.’

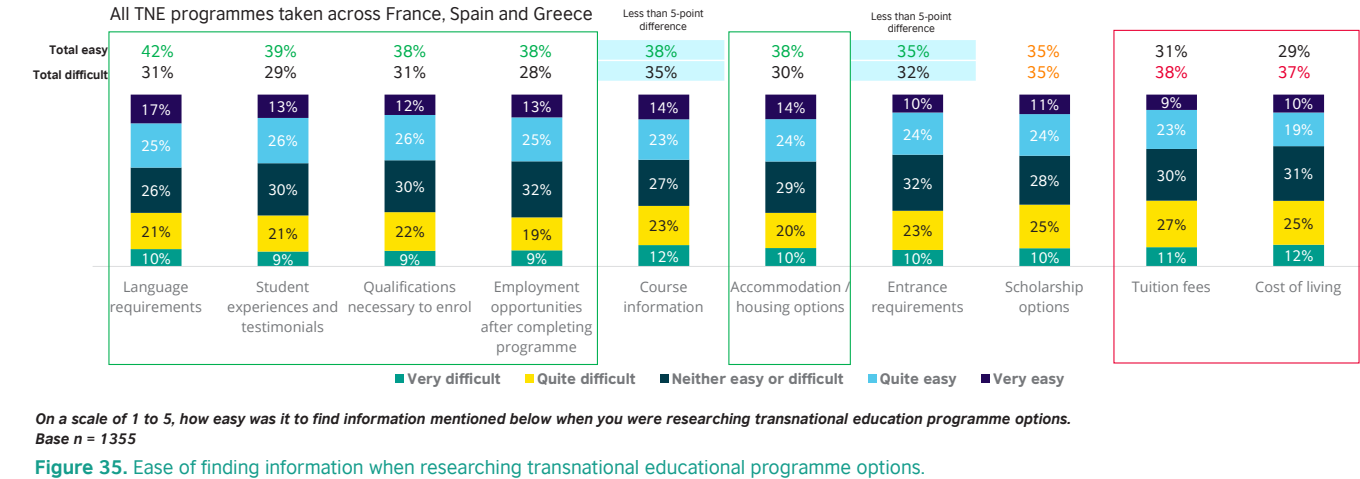
In-person, undergraduate, home country student, studying in Greece.

‘With all the other universities, I would speak to a call centre, and it just felt a bit forced. But I actually spoke to the people here, and they were really friendly, and talking to me and answering all the questions I had.’

In-person, undergraduate, international student, studying in Greece.

5.2.3.1.4 Problems with finding relevant information

Students highlighted numerous weaknesses in the marketing and communication of TNE programmes. This ranged from a lack of awareness of the concept of TNE overall to difficulty researching options and finding programme information.



Language requirements, student experiences and testimonials, qualifications, employment opportunities, and accommodation options were the easiest areas of information to find for TNE programmes. However, a significant number of students still struggled to locate this information, indicating that there is room for making access to it more straightforward and accessible.

The survey shows that there is general difficulty in finding information in two crucial areas:

- **Finance-related:** Cost of living and tuition fees.
- **Course-related:** Course information and entrance requirements.

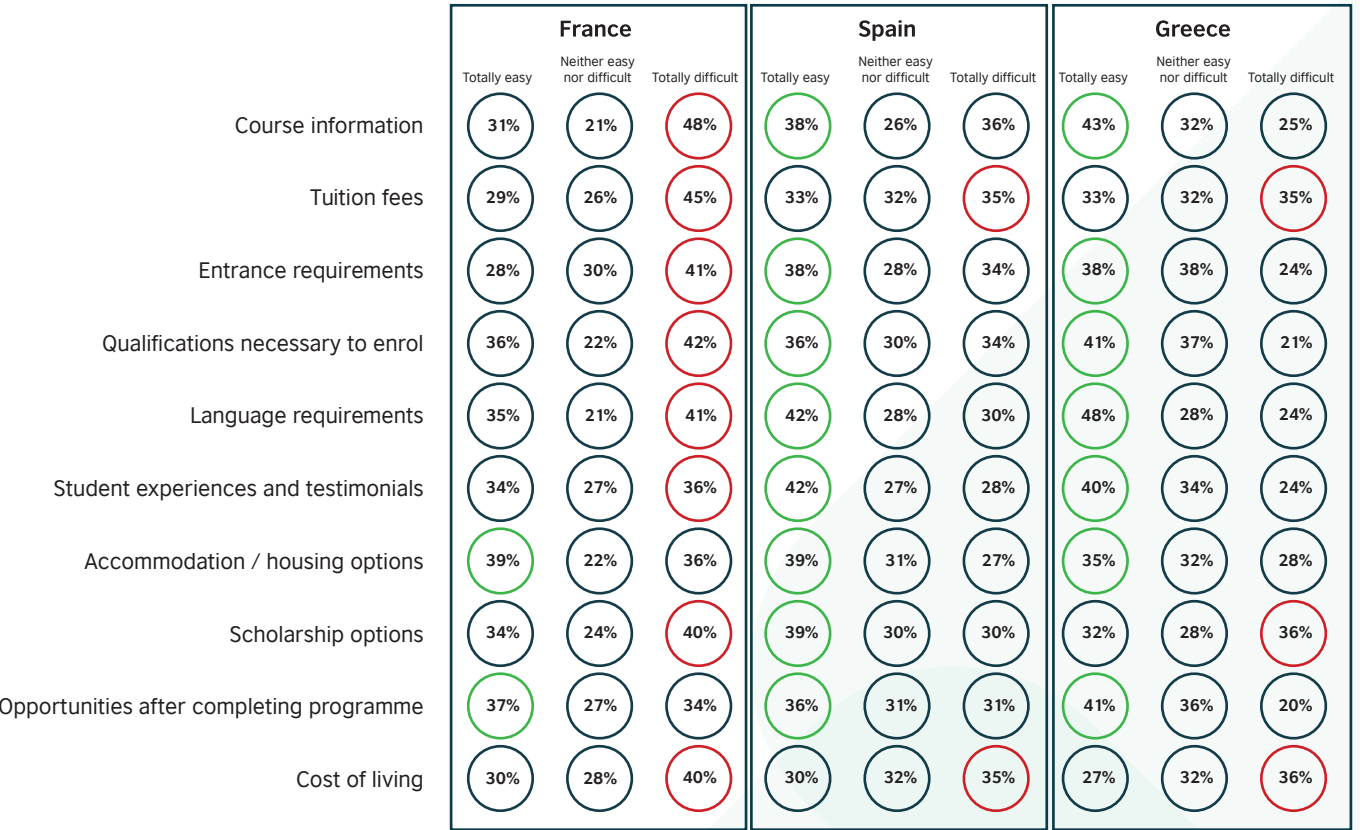


Figure 36. Relative difficulty finding TNE programme information, by country.

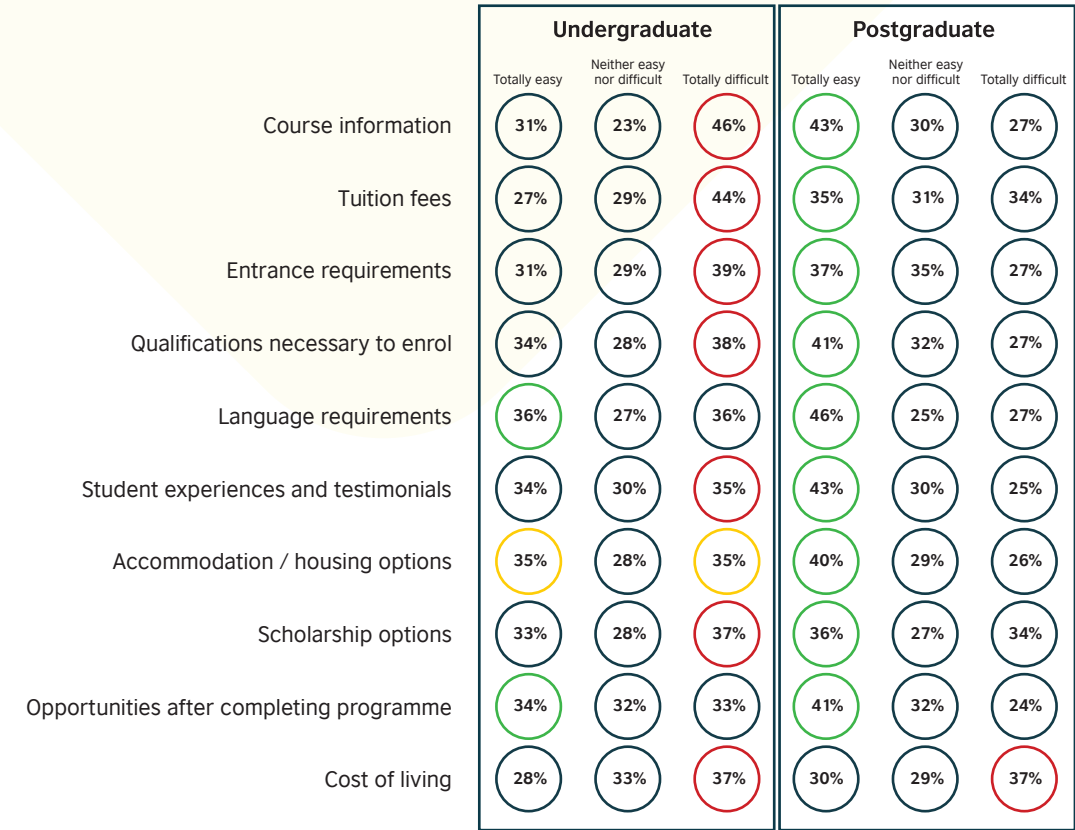


Figure 37. Relative difficulty finding TNE programme information, by level of study.

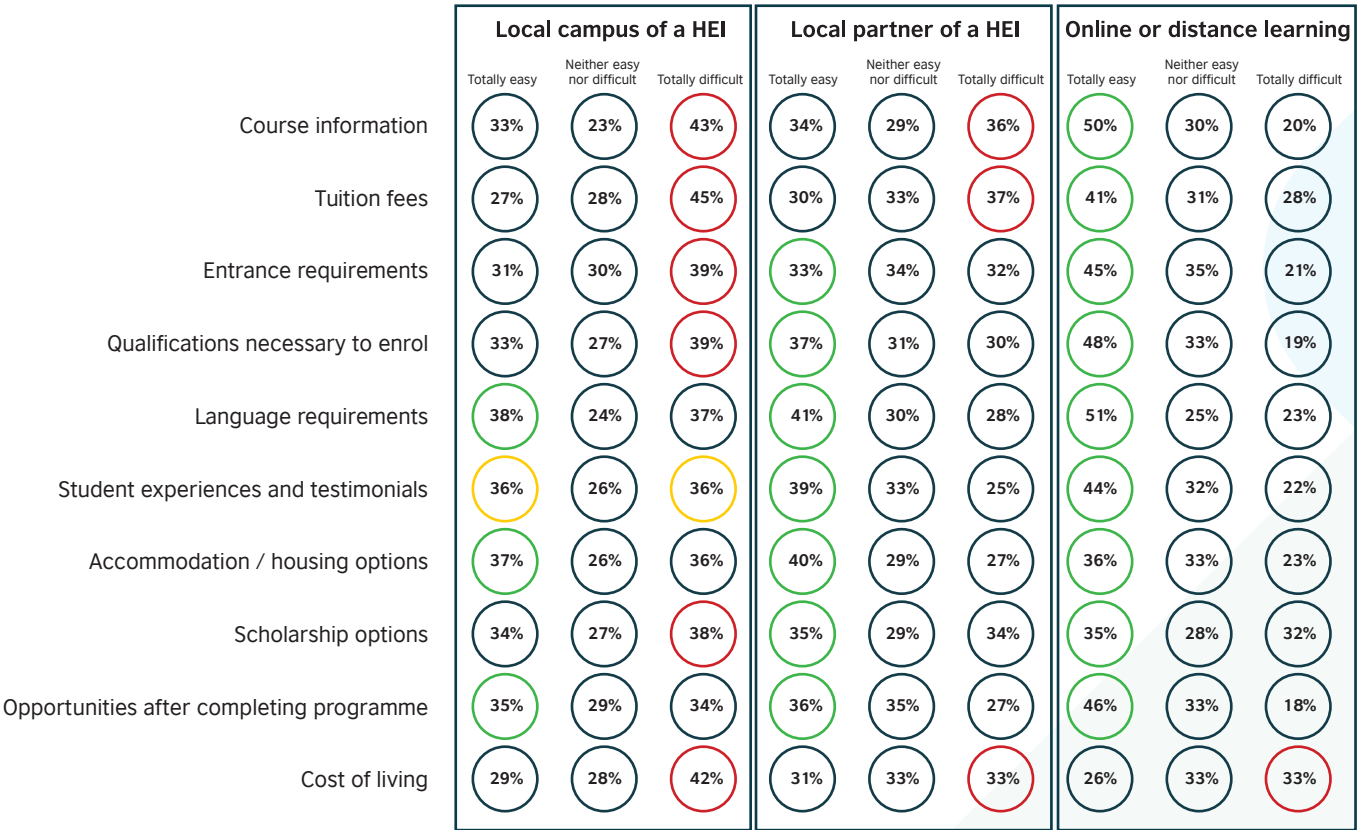


Figure 38. Relative difficulty finding TNE programme information, by mode of delivery.

This demonstrates the varying degrees of difficulty that students faced in accessing information about TNE programmes across different countries, education levels and delivery modes. It stresses the challenges in France, moderate accessibility in Greece and Spain, and the disparity between undergraduate and postgraduate experiences in finding important information about TNE programmes. Online programmes generally offered better information accessibility, while local partner and campus programmes needed improvements, particularly regarding tuition fees, course information and cost of living details.

‘The ULIP website was quite easy to navigate which is not the case for some institutions.’

In-person, undergraduate, home-country student in France.

‘Most of the universities did have the modules that you’re going to take. They did tell you what you were going to do later in your years, and what other things you can choose. I was really happy because mostly in Greece, with our universities, they don’t really have this much information on their websites.’

In-person, undergraduate, home-country student, studying in Greece.

‘I find that the websites are quite packed and it’s not always clear where you want to find all the information you wish.’

In-person, undergraduate home-country student in France.

Recommendations

The following recommendations aim to strengthen the marketing strategies of UK higher education institutions offering these degrees and for institutions in France, Spain and Greece providing TNE programmes. Other UK agencies supporting TNE, such as the British Council and Universities UK, may also support the implementation of some of these recommendations.

Recommendation 1 – Make use of the online channels students use for researching programmes to increase awareness of TNE.

- Creating increased awareness of TNE programmes is essential to encourage student consideration for these programmes. Currently, students primarily discover these programmes from **online channels such as search engines, institutional websites and study-abroad platforms**. Using these channels effectively can significantly improve awareness. Critical strategies include optimising search engine results to direct students to relevant programme information.
- Using social media platforms can amplify awareness by tailoring content to each channel, featuring **student testimonials and providing insights into the student experience**. This also includes adapting digital marketing materials to local audiences.

Recommendation 2 – Create defined partnership marketing campaigns to ensure offline channels are effectively used with schools, colleges and agents.

- Offline awareness of TNE programmes is equally crucial. Students often learn about these programmes from trusted sources. **Establishing partnerships with high schools or colleges** can enable word-of-mouth marketing and promote TNE programmes as a credible higher education option.

Recommendation 3 – Improve and increase the relevant online information for prospective students, particularly for campus and local partner programmes.

This is a crucial step towards enhancing the user experience for students researching TNE programmes. At this stage, students are evaluating their options. Providing accessible information can significantly influence their decision to pursue these programmes. The main areas highlighted in this report include **enhancing information related to tuition fees, the cost of living, and course details such as module information and admission requirements**. Dealing with these gaps will improve the information available for both campus-based and local partner programmes.

Recommendation 4 – Strengthen marketing by using the following findings on reasons students choose a TNE programme from the UK. Present the following:

- Emphasise the uniqueness of UK degree courses by highlighting the **variety of specific module offerings**.
- Highlight how students can advance their careers at home and abroad, **demonstrating how credentials can be used in other countries**.
- Show the ways TNE programmes can enrich the student experience by offering **opportunities to immerse themselves in UK culture**.
- Highlight the advantages of **smaller class sizes at campus institutions**.
- Promote the **international networking opportunities** that students can access on the programme.
- Demonstrate how TNE programmes provide **flexible learning options** that accommodate prospective students' commitments effectively.

Recommendation 5 – Develop specific multichannel stories of alumni, student ambassadors and teaching staff

- Personal and word-of-mouth recommendations were highlighted in the survey as being crucial to supporting TNE choices of students.
- Alumni can be used to highlight professional networks, current student ambassadors can highlight in-course flexibility and cultural experience, and staff can highlight aspects such as industry links and employability.

Conclusion

This report identifies the main reasons why TNE students studying in France, Greece and Spain choose their TNE programmes, and the marketing channels that support their decision-making process. The report also identifies some trends in student motivations when choosing TNE programmes that are more specific to UK TNE, as well as differences in segmentation by TNE delivery country (France, Greece and Spain), level of study (undergraduate or postgraduate student), domicile (home or international students) and model of delivery (international branch campus, collaborative provision and online learning). The methodology included: desk-based research for a literature review; analysis of information sources, including HESA, to understand UK TNE trends in France, Greece and Spain; website research to identify TNE partnerships between UK and non-UK institutions and those in France, Greece and Spain; and primary research including a survey distributed to 1,355 TNE students in the three countries, seven interviews, and an online community interaction.

The analysis of HESA information identified that Greece has the highest level of UK TNE of the three countries by a considerable distance, followed by Spain and France. Each market has different configurations of UK TNE. Greece and Spain have a higher proportion of undergraduates enrolled on UK TNE programmes compared to France, though the proportion of postgraduates on UK TNE in Greece is growing. France has a slight majority of UK TNE students enrolled on distance learning TNE programmes, with collaborative provision being the most common model of TNE delivery in Greece and Spain. All three countries have witnessed declining direct recruitment to universities in the UK, likely to be the result of higher fees charged to EU students since the change in fee status from ‘home’ to ‘international’ in the UK. This declining mobility to the UK may present future opportunities to increase UK TNE enrolments in France, Greece and Spain, where the cost of a UK education may be more affordable. The TNE mapping exercise identified that the UK is in a competitive environment for TNE in France, Greece and Spain from universities from the US, Canada, Germany and other EU countries.

The survey identified the main reasons for students in France, Spain and Greece choosing TNE programmes. A recurring factor across all markets was proximity to family and home. Comparing attitudes to UK TNE programmes with non-UK TNE programmes, other factors were evidenced, including the variety of courses or modules offered by UK TNE programmes compared to domestic institutions; the perceived higher quality of UK education; the potential to improve employability opportunities and international professional networks; and the social and cultural

experience of doing a UK TNE degree. All these factors were most significant among UK TNE students in Greece, postgraduate students and students on online programmes. Perceived flexibility of TNE programmes was also an important factor for students on both UK and non-UK programmes.

The second part of the research into how students access information about TNE programmes highlighted the importance of promoting UK TNE programmes to attract prospective students in their home countries and from abroad.

First, awareness of TNE programmes can be improved by developing a coherent marketing strategy for TNE courses that brings together student needs and ambitions, clear messaging on the benefits of TNE, and implementation across the different channels where students are looking for information on TNE programmes. Using digital channels such as search engines and social media platforms tailored to student preferences can develop programme visibility. Equally important is the development of offline partnerships with high schools and colleges to improve word-of-mouth marketing.

Second, improving the availability and accessibility of information online, particularly for campus and local partner programmes, is essential. Enhancing details related to tuition fees, living costs, course specifics and admission requirements will better support students in their decision-making process.

Last, enhancing marketing materials and messaging to highlight the distinctive features of UK degree courses – including career advancement opportunities both domestically and internationally, immersive cultural experiences, smaller class sizes, and international networking opportunities – will effectively appeal to prospective students interested in UK TNE programmes.

By implementing these strategies, institutions can effectively cater to the preferences and needs of students seeking international educational experiences. This approach not only strengthens their competitive positioning but also fosters a supportive environment for students exploring UK TNE programmes as a pathway to academic success. This approach could also be supported by a UK sector-wide approach; for example, the British Council could host a space for TNE on the Study UK website. Centralisation of information, perhaps even student applications, for TNE programmes could likewise be co-ordinated on a UCAS-type platform, providing clear and transparent course and fee information for prospective students around the world.

This is an exploratory study and limited by the data available at the time that the research was carried out. While both Times Higher Education and the British Council make every effort to ensure that the information provided in the report is accurate, they make no warranty (whether express or implied) and accept no responsibility for the accuracy or completeness of the report. Times Higher Education and the British Council make no warranty or guarantee as to the report’s intended use and do not assume any legal liability, whether direct or indirect, arising in relation to reliance on the report.

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