

CREATING OPPORTUNITY WORLDWIDE

**RESEARCH
ON GREECE-UK
HIGHER EDUCATION
INSTITUTIONAL
COLLABORATION
IN THE FIELD OF
TRANSNATIONAL
EDUCATION**



In May 2018, the British Council brought together policy makers, ministers and university vice chancellors from Greece and the UK to discuss the future of UK transnational education in Greece at a forum in Athens entitled: The future of UK Higher Education in Greece after Brexit: Challenges, opportunities and prospects. This flagship conference was delivered in partnership with Universities UK International and hosted at the Stavros Niarchos Foundation Cultural Centre in Athens.

The British Council has commissioned this report by Dr Vangelis Tsiligiris to build on our efforts to support collaborations between the Greek and UK higher education sectors in this area and improve understanding of the TNE sector. It provides valuable insights into student perceptions of TNE, preferred models of delivery, policy considerations and potential opportunities.

There are some very positive messages in this report. It provides evidence that there is a clear window of opportunity for an increase in TNE in Greece and presents areas for consideration and action by stakeholders to facilitate this. It recommends that resolution of recognition issues is prioritised, along with the development of TNE collaborations with Greek public universities focused on double or dual and joint degree arrangements, an area that the report identifies as having high prospects.

The report provides a fascinating insight into TNE policy and practice in Greece and explores how different models can benefit stakeholders in different ways. I have no doubt that it will provide valuable material for analysis to those considering setting up new TNE operations in Greece or expanding existing activity.

There is a growing number of students who study with the UK but not in the UK. Now is the time to act, Brexit or no Brexit, to ensure students continue to have access to international opportunities.

Kevin Van-Cauter
Principal Consultant Higher Education
British Council, UK



There is a great breadth of UK transnational education in Greece. We at the British Council are pleased to have supported UK universities from their earliest ventures into this field. Our regional and local teams provide market insights, facilitate conversations and assist the provision of transnational education through policy development. Internationalisation of higher education is a priority for the UK. We will continue to offer our expertise to develop sophisticated partnership models that meet highest quality standards. This report makes an important contribution to these conversations in the UK, Greece and Europe more widely. I am very happy to see our work bearing fruit.

Bianka Stege
Director of Education & Society
British Council, EU region



Dr Vangelis Tsiligiris is a principal lecturer at Nottingham Business School, Nottingham Trent University and a visiting professor at Birmingham City University.

He studied financial technology at the University of Oxford, economics at the University of East London, management at the University of Leicester and holds a PhD in cross-border higher education management from Birmingham City University.

He has broad experience in European transnational education and internationalisation of higher education. Over 13 years, he developed and managed several European universities' overseas partnerships. Currently he is the Director of the Master courses in accounting, finance, investment banking, and financial technology at Nottingham Business School of Nottingham Trent University. Vangelis is an experienced researcher in the area of international higher education. He has published extensively in academic journals and books and presented his works at several international conferences. A record of his work can be found [here](#).

He has acted as advisor to the Maltese government on the internationalisation of higher education and he conducted high-profile research consultancy projects for the British Council, Universities UK International and NAFSA: Association of International Educators (USA). In 2016, Vangelis founded the TNE-Hub (www.tnehub.org), an international network of researchers and practitioners in international higher education. Today the TNE-Hub has more than 200 members from 25 countries.

We would also like thank to Marianne Doyle for her invaluable contribution to this research.

Dr Vangelis Tsiligiris
Principal lecturer
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Greece is the largest and most experienced market for UK transnational education in Europe. Most programmes have existed for more than 20 years. The total number of Greeks benefiting from a UK education delivered in Greece and the UK combined is 27,500 and there are around 350,000 Greek graduates of UK universities – one of the largest Greek alumni groups in the world. These figures are a testimony to the breadth and depth of educational connections between the two countries and the high regard for UK education in Greek society. This is why this report is so important. It provides a valuable insight into the current types and level of institutional collaborations especially in transnational education, surveys the views of policy makers, education leaders and students, evaluates opportunities and challenges and makes recommendations. We hope this rigorously researched report will be an effective instrument in knowledge exchange between education leaders in both countries, contributing to the increase of institutional collaborations between UK and Greek and other international universities.

Maria Tsakali
Head of Education & Society
British Council, Greece

RESEARCH ON GREECE-UK HIGHER
EDUCATION INSTITUTIONAL
COLLABORATION IN THE FIELD OF
TRANSNATIONAL EDUCATION

Executive summary

This report presents a multi-dimensional and multi-stakeholder overview of the UK transnational education (TNE) market in Greece. The research adopts a unique multi-stakeholder perspective to examine and identify key market trends and perceptions, and the policies that shape the current state and future of the UK TNE market in Greece.

The chosen methodology combined a desk study with extensive primary research, which included surveys and interviews with UK higher education institutions (HEIs), local partners, TNE students and policy makers. This secondary and primary data has been used to uncover the deeper drivers of market trends and policy developments. Additionally, separate consideration has been given to how the potential impact of the UK's departure from the European Union (EU), due to Brexit, will impact the TNE market in Greece.

The market of transnational education programmes within Greece

With 16,555 TNE students, Greece is the top host country for UK TNE learners in the EU, and traditionally one of the top sending countries of inbound students to the UK. This places Greece amongst the top ten markets globally, ranked third in the number of UK programmes and seventh in terms of enrolments.

UK TNE programmes have been offered in Greece since the early 1990s, and today 75 per cent of TNE students in Greece study at undergraduate level. The majority of UK TNE provision in Greece happens through franchise and validation arrangements. More than 95 per cent of UK TNE students are of Greek nationality, with a small number of students coming from other countries, mainly Albania and Cyprus.

While almost four in ten UK HEIs (70 out of 162, or 43 per cent) have some TNE presence in Greece, five UK HEIs account for 60 per cent of the UK TNE market in Greece, and more than half of the UK HEIs with a TNE presence in Greece have no more than 50 students. During the past ten years, there have been significant changes in the market share of UK HEIs, demonstrated by the fact that the five UK HEIs in Greece with the highest number of TNE students in 2016-17 weren't even amongst the top five in 2007-8.

In Greece, UK TNE is offered by local partners who operate as private colleges. There are 35 colleges in Greece who are licenced to engage in TNE activity at the tertiary level, and 80 per cent of these collaborate with UK HEIs (with France and the US being the two other main countries of collaboration). By far the most prevalent forms of TNE in Greece (more than 70 per cent) are validation and franchise

arrangements, due to Greek Colleges not having degree awarding powers and, therefore, not being able to leverage other forms of TNE, such as joint and double degrees.

There is a high concentration of the TNE market across five colleges, and these account for 67 per cent of the total number of UK TNE students in Greece. In contrast, there are many colleges (15 of 35) with less than 100 students each. Fees for UK TNE programmes in Greece are lower than fees for home/EU students in the UK, ranging from €3,000 to €9,200 for undergraduate programmes and from €4,000 to €15,000 for postgraduate programmes.

The major factors driving demand for TNE in Greece are quantity (i.e. available places) and quality (i.e. facilities and organisation, employability prospects, internationalisation of curriculum) gaps in programmes offered by Greek HEIs. Historically, the perception in Greece of UK higher education has been highly positive in terms of quality and overall standing. This positive perception, coupled with the consistent supply gaps, has contributed to the development of the TNE market in Greece.

In recent years, another key factor driving demand for TNE in Greece has been the emergence of Cyprus as a study destination for Greek students, primarily due to the shared language, geographical proximity and recognition of qualifications. Indeed, in 2018, more than 13,000 Greek students were studying in Cyprus, while in 2000, there were none.

Analysis of the demand of state and private institutions for transnational education programmes

Greek higher education institutions

The rectors and senior executives of Greek HEIs interviewed for this study expressed very positive perceptions about the quality and overall standing of UK higher education. However, the majority of respondents from seemed to be unclear about the full spectrum of TNE arrangements in Greece, and seemed to have negative perceptions towards TNE, associating it solely to franchising.

These negative perceptions are grounded in the longstanding rivalry between public and private education providers in Greece, but, also, in the lack of awareness about the different aspects and benefits of internationalisation.

The evidence shows that there is a correlation between a) the existence of a clear and operational internationalisation strategy and b) a positive perception of and demand for TNE within Greek HEIs. Those Greek HEIs with an internationalisation

strategy in place appear to be very positive in terms of demand for TNE collaboration. At the same time, those who appear to be against any form of TNE collaboration are those with no clear internationalisation strategy, and hold stereotypical negative perceptions of colleges offering TNE as inferior to Universities.

Several rectors in Greek HEIs expressed their willingness to engage in TNE activities with certain UK HEIs at the top of the university rankings in the UK. The key drivers for Greek HEIs to establish TNE collaboration opportunities with UK HEIs are:

1. to attract international students
2. to acquire and develop capacity in internationalisation.

Certain limitations imposed by the domestic policy environment hinder the ability of Greek HEIs to develop programmes for international students and to establish TNE partnerships. These obstacles can be summarised as:

- a) no spare capacity to accommodate additional students, especially at the undergraduate level
- b) restrictions on the fee structure for undergraduate and postgraduate programmes
- c) restrictions on the development of undergraduate programmes in a language other than Greek.

Consequently, the majority of Greek HEIs indicate a willingness to engage in the development of postgraduate programmes in English. Also, the preferred TNE model for Greek HEIs is double and joint degrees.

Local partners – Greek colleges

Across the private sector there is a consensus that UK TNE carries significant value, as both a driver for student demand and operating efficiency.

The local TNE market is very sensitive to factors such as the academic and professional recognition of qualifications, and less sensitive to factors such as ranking and institutional reputation of the UK HEI. In contrast, the latter factors are important for outbound students. This creates two distinct student markets (TNE and outbound) in Greece for UK HEIs.

Of the Greek colleges participating in this research, 90 per cent reported a desire to either expand or develop new collaboration opportunities. Greek colleges show a preference for validated and franchised programmes taught in Greek. None of those interviewed indicated an intention to reduce or terminate their existing UK TNE arrangements.

Some Greek colleges consider France, Germany and Netherlands as alternative TNE home countries.

Local partners indicate that the subjects with the most future potential in terms of positive demand in Greece are those related to computer science, business studies, biological science (including psychology) and medicine.

UK higher education institutions

The research surveyed 51 UK HEIs, both with (54 per cent) and without (46 per cent) a TNE presence in Greece.

UK HEIs perceive Greece as being a suitable host country for TNE activities. Some of the Greece's strengths are the experience of local partners (Greek colleges) and awareness amongst students and partners of the UK education model and approach. Another positive factor is the intellectual ability and dedication of Greek students.

The majority (73 per cent) of the UK HEIs with an existing TNE presence in Greece are considering maintaining (20 per cent) or expanding (53 per cent) their TNE activities in Greece. Only one in four UK HEIs with an existing TNE presence in Greece is considering reducing the size or scale of these activities. This shows that UK HEIs with an existing TNE presence have an overall positive perception about the future direction of the TNE market in Greece.

Of the UK HEIs with no TNE presence in Greece, around one in four (27 per cent) is considering establishing a presence within three years. This accounts for around 25 UK HEIs in total that might establish a TNE presence in Greece.

For UK HEIs with an existing presence in Greece, the preferred modes of TNE are validation (31 per cent), franchise (23 per cent) and top-up programmes (15 per cent).

For UK HEIs with no TNE presence in Greece, the preferred modes are Franchise (23 per cent), progression agreements (22 per cent), joint degrees (11 per cent), double/dual degrees (11 per cent) and online/distance learning (11 per cent).

The subject areas viewed as having the most positive future potential are the same as those identified by local partners.

This research explored markets other than Greece under consideration by UK HEIs for TNE activity expansion. The top markets currently being explored are East Asia (China), South East Asia, South Asia (India and Sri Lanka). Germany is also in the top ten.

Analysis of the financial, legal, institutional and recognition related factors that may affect growth in the transnational education sector, from both UK and local perspectives

Local perspectives

Colleges kept in the 'grey area' of Greek higher education

While significant improvements have been made to the policy and regulatory environment for TNE in Greece, local partners have the perception that Greek colleges are kept in the 'grey area' of Greek higher education. This view is based on the prolonged delays in 1) the recognition of TNE qualifications and their integration in the National Qualification Framework, 2) the regulation of the TNE sector and 3) the integration of colleges within the formal education sector.

According to local partners, these pending issues do not allow them to fully capture the strong domestic demand for UK higher education programmes as an alternative to Greek HEIs.

Impact of the financial crisis on outbound students

While the financial crisis did not affect the demand for TNE, it impacted on the study destination of choice for outbound students. Since 2010, Greek outbound students have favoured Cyprus, over the UK and other traditional study destinations, as a way of reducing study costs. Local partners believe that if they had been fully recognised as providers of higher education, about 15,000 students currently studying in Cyprus would have stayed in Greece.

Technical issues with recognising transnational education qualifications

Despite significant progress in the recognition of TNE qualifications in recent years, there are still technical issues which, according to local partners, pose significant obstacles to the growth of the sector.

- The current process of recognition does not consider the degree classification of TNE qualifications (e.g. all Bachelor degrees are recognised as third class).
- TNE qualifications in Greece are not eligible for academic recognition by the Greek National Academic Recognition Information Centre (NARIC). This restricts the transferability and employability prospects of graduates that would have been possible through the NARIC global network.
- Because TNE is not part of the formal education sector in Greece and, consequently, TNE qualifications lack academic recognition, foreign students who are considering studying in Greek colleges will face problems when

attempting to seek recognition of a qualification obtained in Greece via a TNE partnership in a different country.

- Some professional bodies in Greece, such as the Economic Chamber of Greece, require academic recognition of higher education qualifications to enrol graduates as members. Even though this goes against EU legislation, the problem remains unresolved.

UK perspectives

UK HEIs consider the policy environment and the economic climate as the two most influential adverse factors for TNE growth in Greece.

Complex policy environment

Despite the progress made in recent years, UK HEIs indicate that the complexities, rigidity and frequent changes in legislation relating to TNE in Greece lead to policies and a policy environment that can be difficult to navigate. Giving degree-awarding powers to local providers would be a key development and would allow faster growth of the TNE sector.

Complexity of the Greek market

Because of the complexity of the education market in Greece (e.g. the regulatory environment and demand conditions), several UK HEIs indicate the need for more thorough due-diligence as a prerequisite for establishing and developing a sustainable TNE presence in Greece.

Effects of the economic climate on future demand and costs

UK HEIs indicate that as an outcome of the economic climate in Greece, Greek TNE students have become more cost sensitive, which in turn pushes local partners to lower fees for TNE programmes, making Greece less competitive as a TNE host country.

Strategic issues internal to the home institution

Issues internal to UK HEIs, such as a lack of a clear internationalisation strategy and differences in the priorities related to TNE activities within different departments, are viewed as factors that can influence the growth of the TNE in Greece and in other key host countries.

Student decision-making process for transnational education programmes

To draw a more accurate picture of student decision-making for TNE programmes in Greece, the research investigated:

1. the experience of UK TNE students in Greece
2. the perception of UK TNE amongst UK TNE students in Greece
3. the perceptions of UK TNE amongst other students
4. the decision-making process of UK TNE students when selecting a programme and institution
5. the future demand and preference for UK TNE programmes in Greece.

There were 520 valid responses to the questionnaire survey, consisting of 41 per cent of existing UK TNE students and 59 per cent of other students.

Experience of UK transnational education students in Greece

UK TNE students in Greece are generally satisfied with their existing student experience. They feel happy to recommend their programme/institution to a friend.

The wider areas for improvement highlighted by UK TNE students are 1) the employability prospects of TNE qualifications in comparison to local HE qualifications and 2) support by the home institution (e.g. the UK HEI) in terms of participating in teaching delivery and providing opportunities to liaise with academics and students in the main campus.

UK TNE students also suggest improvements in relation to programme design (e.g. electives, working experience opportunities), the model of delivery (e.g. contact hours, interaction with UK HEI academic staff, practical case studies) and consistency in the quality of academic staff.

Factors affecting decision-making by UK transnational education students and other students in Greece

The top three decision-making factors for both UK TNE students and other students are employability in the international market, quality of education and prospects for further studies abroad.

How prospective students gather information

UK TNE students gather information about academic programmes and institutions through family and friend recommendations, and online sources. In contrast, other students rely on online sources more than friend and family recommendations. TV

advertisements seem to have some impact for UK TNE students, but little impact on other students.

Future demand trends and preferences according to students

Level of study

The majority of students who participated in the research indicated their willingness to pursue postgraduate studies. This is reflective of the current market dynamics in Greece, where there is strong demand for, and not enough supply of, postgraduate programmes. Considering there is shortage of appropriate postgraduate programmes, there is an opportunity for UK HEIs to offer postgraduate programmes via TNE collaboration.

Preference for transnational education vs. outbound mobility

The research findings indicate that UK TNE students are willing to stay in the host country and continue their studies at the next level. In contrast, other students are more inclined to study abroad. This could be considered as an indication that TNE students and outbound mobile students have different preferences. Therefore, TNE does not act as a direct substitute to outbound mobility. This is reinforced by the feedback provided by local partners, which indicates that the decision-making of TNE students is driven by the professional and academic recognition of the qualification. In contrast, Greeks who study abroad tend to be influenced more by the reputation and the ranking of the overseas HEI. Overall, the findings of the research indicate that there are two distinct student markets (TNE and outbound) in Greece for UK HEIs.

The UK remains the top study destination or foreign provider of higher education programmes for Greek students. However, there is noticeable growth in the number of students choosing other destinations, namely Cyprus, Germany, Netherlands, Canada and France.

Preferred model of higher education delivery for the future

When it comes to the preferred delivery models for the future, UK TNE students prefer 1) branch campuses of foreign universities, 2) private universities and 3) foreign university programmes in collaboration with Greek colleges or Greek HEIs.

In contrast, other students prefer to see 1) the development of TNE collaboration between Greek HEIs and foreign universities, 2) branch campuses of foreign universities and 3) distance learning programmes.

For seven in ten Greek HEI students, who represent a larger segment of the Greek student market, the most preferred development is the creation of TNE partnerships between foreign universities and Greek HEIs.

An insight to the policy environment and set of recommendations for strategic engagement with decision makers aiming to encourage institutional collaboration with the UK

Current policy environment

Only Greek HEIs and the licensed private colleges are free to engage in TNE activities in Greece. The licensing process has been simplified over the past four years.

In Greece, TNE is not subject to an external quality audit by the host country quality assurance agency – that is the Hellenic Quality Assurance Agency. Instead, quality assurance of is subject to the internal quality assurance process of the awarding institution and the external quality audit/review of the quality assurance agency in the home country (e.g. the Quality Assurance Agency for Higher Education (QAA) in the UK).

The Greek Ministry of Education is responsible for monitoring the implementation of the relevant legal framework by TNE providers in Greece. This includes documentation about TNE arrangements, student numbers per provider and a register of private college teaching staff.

TNE qualifications in Greece are recognised only in relation to their professional aspects. They are not recognised as academic qualifications. According to the existing legal framework, for a foreign higher education qualification to be eligible for academic recognition in Greece, the studies should have been completed in the country of the awarding institution.

Policy recommendations

Reflecting on the evidence gathered by all key stakeholders, the main issues are summarised around factors that create perceptions in Greek society that higher education delivered through TNE is of inferior value and stance to that delivered by public HEIs. Some key policy recommendations can be put forward to resolve issues leading to these perceptions.

- Resolve the issue of recognition within the existing constitutional framework.
- In addition to the UK QAA external quality assurance system, TNE partners in Greece should develop and adopt a host-country focused systematic external quality assurance process.
- Universities UK International (UUKi), British Council, and the Higher Education Academy (HEA) should form an alliance to support improvements in the consistency of the quality of teaching staff in TNE host institutions.

The implications of Brexit from a student, local partner and UK perspective

Students

- Half of UK TNE students are expecting Brexit to negatively impact them, with 48 per cent citing it will not have a negative effect.
- The main concerns relate to the potential for higher fees, uncertainty around UK visas and the cost of living post-Brexit, problems pertaining to qualification recognition, and the overall impact of UK HEIs potentially being less connected to the UK and less international.

Local partners

- Only 19 per cent of local partners reported a high negative impact in relation to Brexit, which can be exemplified as a decline in demand and enrolment on UK TNE programmes in Greece.
- The majority (64 per cent) of local partners reported no negative impact on demand and enrolments for UK TNE programmes in Greece.

UK higher education institutions

UK HEIs have mixed views about the impact of Brexit on their TNE arrangements. Around four in ten UK HEIs expect negative or positive impact.

The institutional responses to Brexit by UK HEIs vary, and can be summarised in five main approaches:

- 1) a comprehensive internationalisation strategy
- 2) a strategy aiming to create deeper and wider collaboration with EU HEIs
- 3) a student recruitment strategy particularly suited for EU students
- 4) a 'wait and see' approach
- 5) an approach that views Brexit as no issue.

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Definitions

Key terms used in this report

Home institution: this refers to the higher education institution (HEI) whose programme is delivered overseas through transnational education (TNE) arrangements. In the context of this research, this refers to UK HEIs.

Host institution: this refers to the local education institution in the host (importing) country.

UK TNE students: this refers to students who are part of a UK university programme in Greece.

Other students: this covers participants in the study who were not UK TNE Students. It includes 1) TNE students who are part of foreign (non-UK) university programmes in Greece, 2) students at Greek HEIs and 3) prospective students.

Local partners: this refers to the Greek colleges who are the TNE partners of UK HEIs. In this report, it is used interchangeably with host institutions and Greek colleges.

Transnational education/TNE: transnational education is education delivered in a country other than the country in which the awarding institution is based (e.g. a student based in Greece studying for a degree from a university in the UK).

Delivery modes of transnational education¹

International branch campus: the home HEI establishes a standalone satellite operation known as an international branch campus in the host country and is responsible for all aspects of recruiting, admission, programme delivery and awarding of the qualification. In addition to faculty employed from the parent institution, the international branch campus may employ local and/or international faculty to assist with teaching. Quality assurance of the programme is the responsibility of the home HEI, and is often subject to additional accreditation processes by the host country.

Franchise: a home HEI authorises a host institution to deliver its (home HEI) programme, with no curricular input by the host institution. The qualification is awarded and quality assured by the home institution. The host institution has primary

¹ The definitions of TNE delivery modes are from **British Council (2013) The shape of things to come: the evolution: data, definitions, opportunities and impact analysis, Going Global 2013**. Available here: https://www.britishcouncil.org/sites/default/files/the_shape_of_things_to_come_2.pdf

responsibility for delivery of the programme, but the home HEI may assist with delivery by providing travelling teaching faculty. Recruitment of students and provision of facilities (library, classrooms, IT resources) is provided by the host HEI. Within franchise programmes, all study takes place in the host country. When a student completes the study in the home country, (e.g. two years in the host country plus one year in the home country), it is commonly known as a twinning programme.

Validated: the process by which a home HEI judges that a programme developed and delivered by a host institution is of an appropriate quality and standard to lead to a degree from the home HEI. The host institution can develop a programme to meet local needs, with the home HEI contributing its quality assurance processes and expertise.

Progression/articulation agreement: allowing host country students who have completed a specified curriculum to apply to a home country programme and enrol with 'advanced standing'.

Distance learning/online: the home HEI delivers its programmes through an online learning environment to students who can attend virtually, without the need to be physically present in the home campus. There are different distance/online education models, some of which involve local tuition undertaken by institutions in the host country. The award is quality assured and awarded by the home HEI.

Double/dual degree: two or more partner institutions in different countries collaborate to design and deliver a common programme. Mobility of students and faculty between the partner HEIs varies by programme. The student receives a qualification from each partner institution. This results in a student receiving two or more qualifications for completion of one double degree programme.

Joint degree: like the double/dual degree programme, where two or more HEIs collaborate to design and deliver a new programme, but with students only receiving one qualification, which includes the badges of each partner institution on the award.

Introduction

Greece is leading UK TNE in Europe, with more than 12,000 Greeks studying UK courses in-country. Greece is also among the top ten markets globally, ranked third in the number of UK programmes and seventh in enrolments. In the UK, in the months following the European Union (EU) referendum, questions about how UK universities will maintain their relationships across the EU have become more common. Amid concerns that EU students may find UK degrees become less accessible, both financially and socially, many university leaders and policy makers are considering TNE. Will UK universities look to grow the programmes they offer in Europe and, specifically, in Greece, and if so, how?

In Greece, local TNE providers, predominantly from the private sector, have been monitoring the situation closely after the referendum, to assess implications to their programmes. Conversations with them so far reveal concerns related with the recognition framework of TNE degrees following the UK's withdrawal from the EU, as well as aspirations and ambitions for further growth, especially if the issue of degree recognition is settled successfully.

The British Council in Greece has conducted this research to collect data about the nature and scale of interest from local state and private institutions for TNE collaboration with UK institutions, as well as to gain an in-depth understanding of the financial, legal, institutional and recognition related issues that may affect growth in this sector in Greece and the UK. The findings of this research will enable the British Council in Greece to develop a strategy of engagement with policy makers and institutions, to support the development of higher education partnerships between the two countries.

Research aims and objectives, and report structure

The main focus of this research is to provide a greater understanding of the market for transnational programmes within Greece, and to offer an analysis of the opportunities, challenges and prospects. The research will also provide an overview of the UK sector's interest in Greece for TNE collaboration. Specifically, the research aims to fulfil the following objectives.

- Provide an overview of the current scale and scope of TNE programmes, the policy environment and state of the market in Greece.
- Understand the perceptions, needs and decision-making process of students in relation to TNE.
- Understand local partners and providers in terms of their capability and interest in delivering TNE programmes, as well as the challenges they face.
- Explore the interest of Greek HEIs for delivering programmes in English.

- Explore the nature and scale of the interest of Greek HEIs for developing partnerships with UK institutions.
- Explore the interest, opportunities, and challenges of UK partners in offering TNE programmes.

The research report is organised into six sections:

- Section 1: the TNE market in Greece
- Section 2: analysis of the demand of state and private institutions for TNE programmes
- Section 3: analysis of the financial, legal, institutional and recognition related factors that may affect growth in this sector, from both the UK and local perspectives
- Section 4: the student decision-making process for TNE programmes in general, and during the transition of the UK's withdrawal from the EU
- Section 5: an insight into the policy environment and a set of recommendations for strategic engagement with decision makers in government and institutions aiming to encourage institutional collaboration with the UK
- Section 6: the implications of Brexit from student, local partner and UK perspectives.

Methodology

TNE is a complex and multi-dimensional topic involving various stakeholders, and it is influenced by the local economic, social and policy context. Additionally, the Greek higher education market, and, in particular, the Greek TNE market, is highly complex, involving a long history of political influence, strong cultural perceptions and certain social stereotypes.

As such, an analysis of TNE in Greece requires an understanding of the underlying dynamics of each stakeholder and between stakeholders. This is possible only through a combination of research methods that can capture the general trends of the TNE market and, at the same time, provide deeper insights into the views of each key stakeholder group. As such, and where this is possible, this study has adopted a mixed method approach, consisting of quantitative and qualitative methods. Specifically, a sequential mixed method design has been used, consisting of 1) questionnaire surveys, followed by 2) personal interviews. Also, to gather a general overview of the TNE market, the research has included a desk study.

Table 1 below outlines the research methods and how these relate to each of the desired research outcomes.

Table 1: Data collection methods, objectives, and stakeholders

Stakeholder/data collection method	Report section/research outcome
Market overview desk study	Section 1: a greater understanding of the TNE market in Greece
TNE local providers (state & private) <ul style="list-style-type: none"> • Questionnaire survey • Personal interviews 	Section 1: a greater understanding of the TNE market in Greece Section 2: analysis of the demand of state and private institutions for TNE programmes Section 2: the demand for English-language speaking programmes as part of institutions' internationalising higher education strategies, and capacity-building opportunities for the British Council Section 3: analysis of the financial, legal, institutional and recognition related factors that may affect growth in this sector, from both the UK and local perspectives
TNE students <ul style="list-style-type: none"> • Questionnaire survey • Personal interviews 	Section 2: the demand for English-language speaking programmes as part of institutions' internationalising higher education strategies, and capacity-building opportunities for the British Council Section 4: a greater understanding of the student decision-making process for TNE programmes in general and during the transition of the UK's withdrawal from the EU
Decision makers/regulators <ul style="list-style-type: none"> • Desk study • Personal interviews 	Section 5: an insight into the policy environment and a set of recommendations for strategic engagement with decision makers in government and institutions aiming to encourage institutional collaboration with the UK
UK HEIs <ul style="list-style-type: none"> • Questionnaire survey • Personal interviews 	Section 2: the demand for English-language speaking programmes as part of institutions' internationalising higher education strategies, and capacity-building opportunities for the British Council Section 3: an analysis of the financial, legal, institutional and recognition related factors that may affect growth in this sector from both the UK and local perspectives

The aim of this study is to identify general trends across different stakeholder groups to provide a comprehensive understanding of the UK TNE market in Greece. Due to the variability in size, scale, type of TNE and business model of UK TNE provision in Greece, there will not be a focus on establishing/identifying relationships of statistical significance.

1. An overview of the transnational education market in Greece

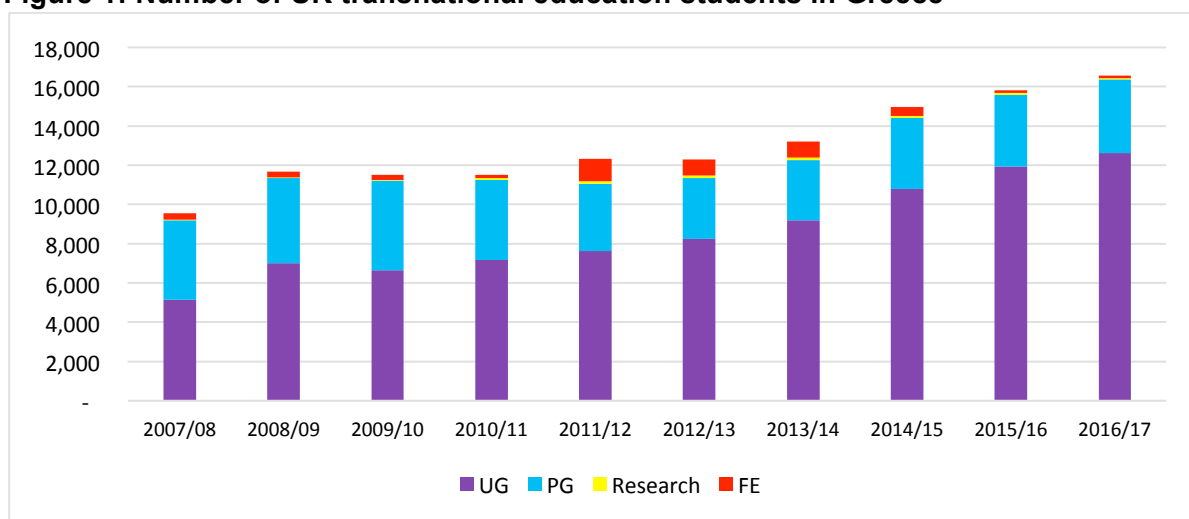
This first section of this report provides an overview of the overall UK TNE market in Greece, covering five key areas: 1) the number, gender and age breakdown of UK TNE students in Greece, 2) the number and nature of UK HEIs with a TNE presence in Greece, 3) the number and characteristics of local partners, 4) types of UK TNE activity in Greece and 5) the fee structures of UK TNE programmes in Greece.

Data in this section was retrieved from 1) the Higher Education Statistics Agency (HESA), 2) the Greek Ministry of Education, 3) a questionnaire survey and personal interviews with local partners and 4) a questionnaire survey with UK HEIs.

1.1 Size of UK transnational education in Greece

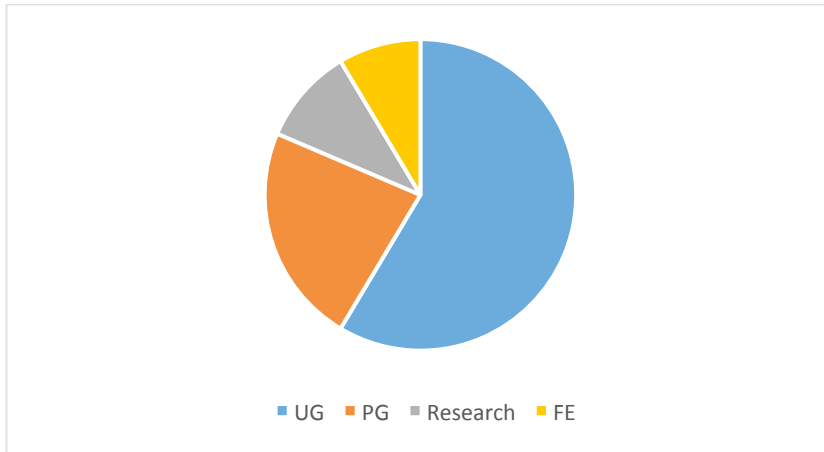
According to the official registry for TNE students held by the Ministry of Education², in **2017 there were 16,555 TNE students in Greece**. This was an increase of five per cent from the **16,094 TNE students in 2016**. These figures largely coincide with the data published regularly by HESA, who reported that in 2016-17 there were 16,585 students in Greece on UK TNE programmes. As shown in Figure 2, approximately three in four UK TNE students in Greece study at the undergraduate level. The vast majority (more than 95 per cent) of students on UK TNE programmes in Greece are Greek. Some colleges enrol students from other countries, mainly Albania and Cyprus. Some colleges have also managed to develop effective international student recruitment strategies, attracting students from multiple countries (see Section 4.1).

Figure 1: Number of UK transnational education students in Greece



² This is the first time the Greek Ministry of Education has disclosed official data about the number of TNE students in Greece.

Figure 2: UK transnational education students in Greece by level of study (2016-17)



1.2 UK higher education institutions with a transnational education presence in Greece

According to HESA, 70 from a total of 162 (or 43 per cent) HEIs in the UK have some TNE presence in Greece. Also, as summarised in Figure 3 and Figure 4, 45 (or 64 per cent) of these UK HEIs have a very low number (less than 50) of TNE students. Only 25 UK HEIs have more than 50 students and can be classified as having a substantial TNE activity in Greece. Five UK HEIs have more than 1,000 TNE students, accounting for 60 per cent of the total UK TNE market in Greece. Overall, this indicates that 1) there is the potential for several UK HEIs, who currently have a low number of TNE students, to look for ways of expanding their activity in Greece, and 2) five UK HEIs are of systemic importance to the UK TNE market in Greece, and, as such, should be supported by the relevant UK bodies.

Figure 3: UK higher education institutions with a transnational education presence in Greece by number of transnational education students

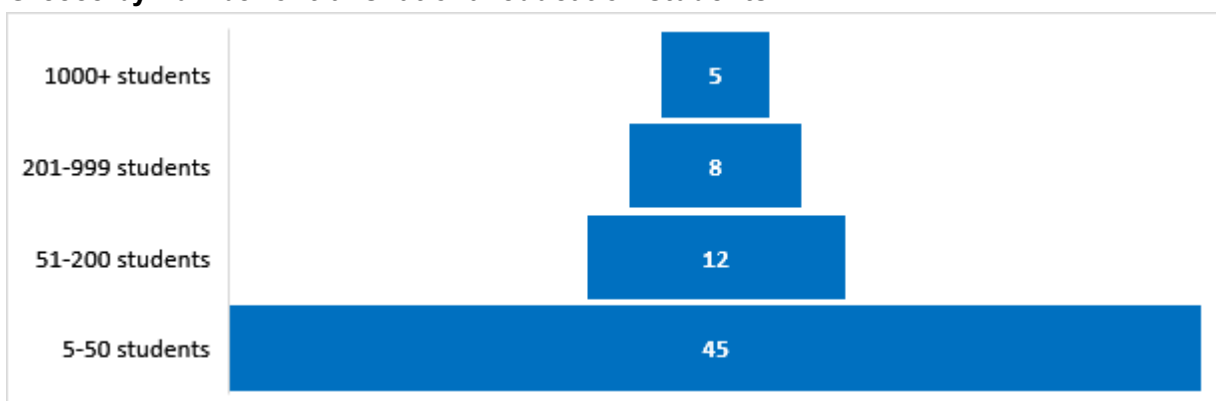
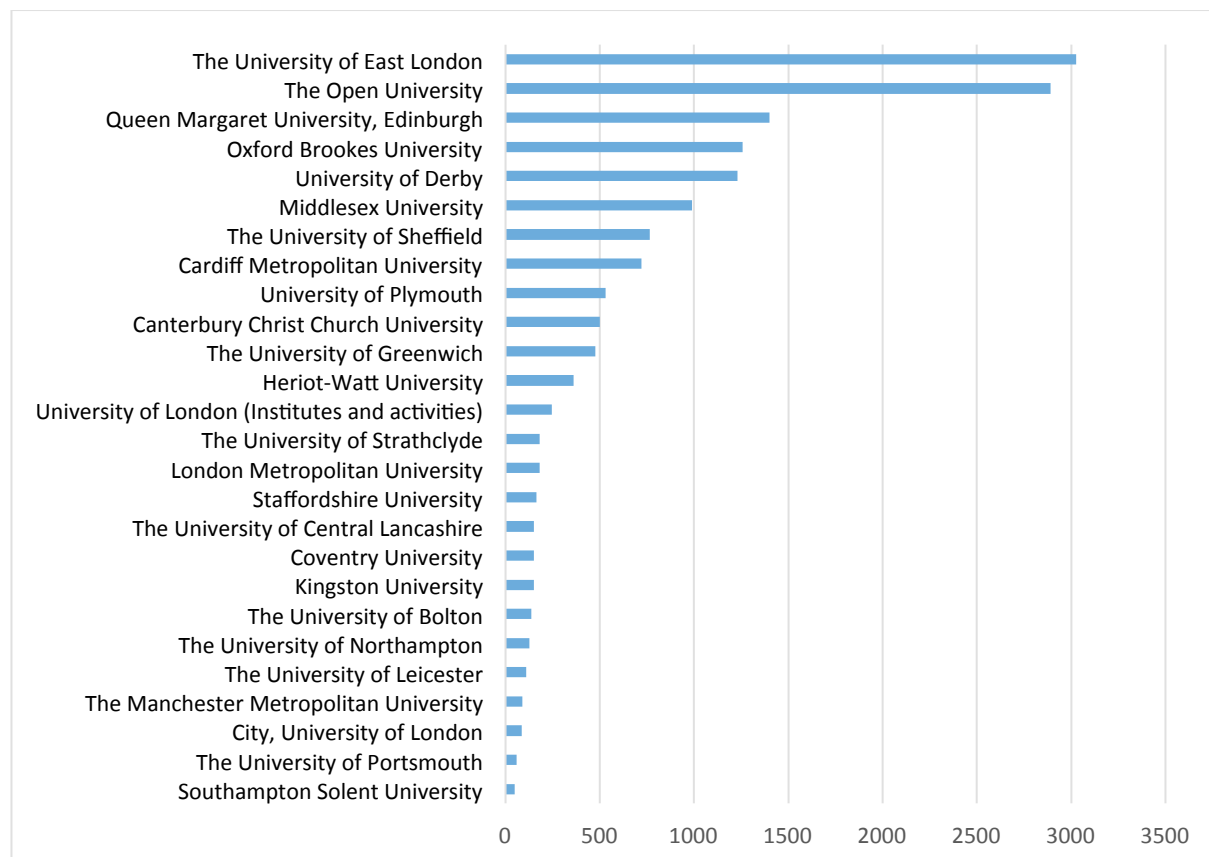


Figure 4: UK higher education institutions with more than 50 transnational education students in Greece



Over the last ten years (2007-17), there have been significant changes to the top 15 UK HEIs by TNE students in Greece (see Table 2). These changes reflect the dynamic nature of the TNE market, not just in Greece, but in other major host countries. At the same time, this indicates that, subject to the appropriate strategic actions, there is scope for UK HEIs to pursue the expansion of their activity in Greece, due to the evident appetite for change.

Table 2: Top 15 UK higher education institutions in Greece by number of transnational education students³

	2016-17 total		2012-13 total		2007-08 total	
1	↑	The University of East London	↑	The Open University		Middlesex University
2	↑	The Open University	↓	Middlesex University		Kingston University
3	↑	Queen Margaret University, Edinburgh	↑	Oxford Brookes University		London Metropolitan University
4	↓	Oxford Brookes University	↑	University of Derby		The University of Leicester
5	↓	University of Derby	↑	The University of East London		University of Hertfordshire
6	↓	Middlesex University	↓	London Metropolitan University		The Open University
7	↑	The University of Sheffield	↓	Kingston University		The University of Wales (central functions)
8	↑	Cardiff Metropolitan University	↓	University of Hertfordshire		Teesside University
9	↑	University of Plymouth	↓	The University of Wales (central functions)		University of Derby
10	↑	Canterbury Christ Church University	↓	The University of Leicester		The University of Central Lancashire
11	↔	The University of Greenwich	↑	The University of Greenwich		University of London (Institutes and activities)
12	↑	Heriot-Watt University	↑	Queen Margaret University, Edinburgh		The University of the West of Scotland
13	↑	University of London (Institutes and activities)	↑	Heriot-Watt University		The University of Strathclyde
14	↓	London Metropolitan University	↓	University of London (Institutes and activities)		The University of Greenwich
15	↑	The University of Strathclyde	↓	The University of Central Lancashire		Heriot-Watt University

↑ = new entry; ↑ = up from previous; ↓ = down from previous; ↔ = no change from previous

³ Analysis of HESA data.

1.3 Local transnational education partners in Greece

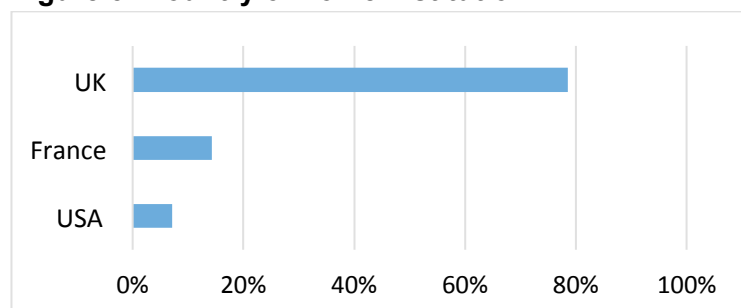
There are 35 licensed⁴ colleges in Greece able to engage in TNE activities at the tertiary education level (National Qualification Framework 5-8). Of these, 15 colleges each have less than 100 students, while the top five Greek colleges in Table 3 below account for around 67 per cent of the overall TNE market in Greece.

Table 3: Top ten Greek colleges by number of transnational education students⁵

1	Metropolitan College
2	Deree College
3	City College
4	Mediterranean College
5	New York
6	Aegean Omiros College
7	City Unity College
8	AKTO College
9	BCA College
10	Hellenic American College

Most Greek Colleges (80 per cent) collaborate with UK HEIs, and, consequently, most TNE activity in Greece relates to UK higher education programmes. The remaining 20 per cent of colleges collaborate with HEIs in other countries, such as the US and France (see Figure 5).

Figure 5: Country of home institution



1.4 Types of UK transnational education activity in Greece

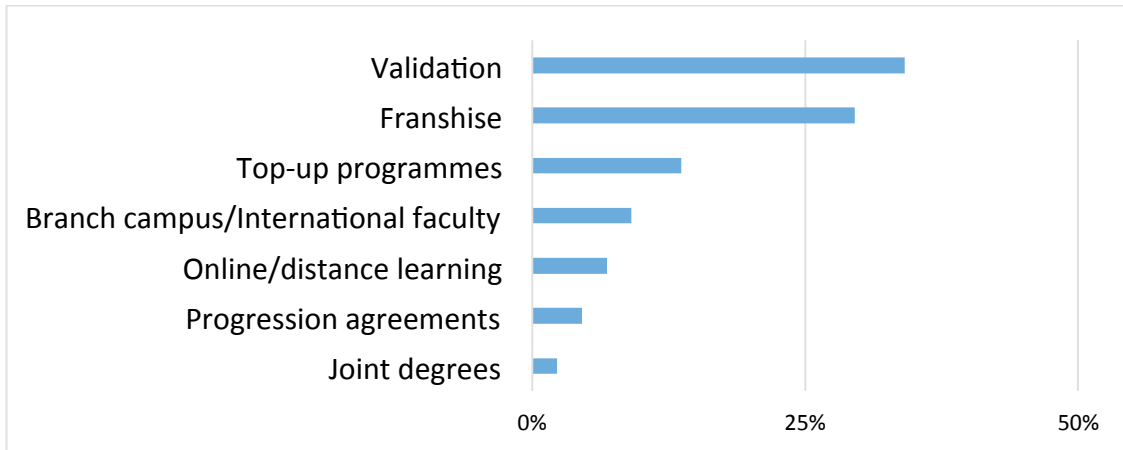
More than 70 per cent of TNE activity in Greece takes the form of validation and franchise arrangements (see Figure 6). This is primarily because Greek colleges do not have degree awarding powers, and, therefore, cannot leverage other forms of TNE activity, such as double and joint degrees. Additionally, franchising and

⁴ Complete list available here (in Greek): <https://www.minedu.gov.gr/sxetika-me-ta-kollegia> [accessed 04/05/2018].

⁵ According to the data provided by the Greek Ministry of Education.

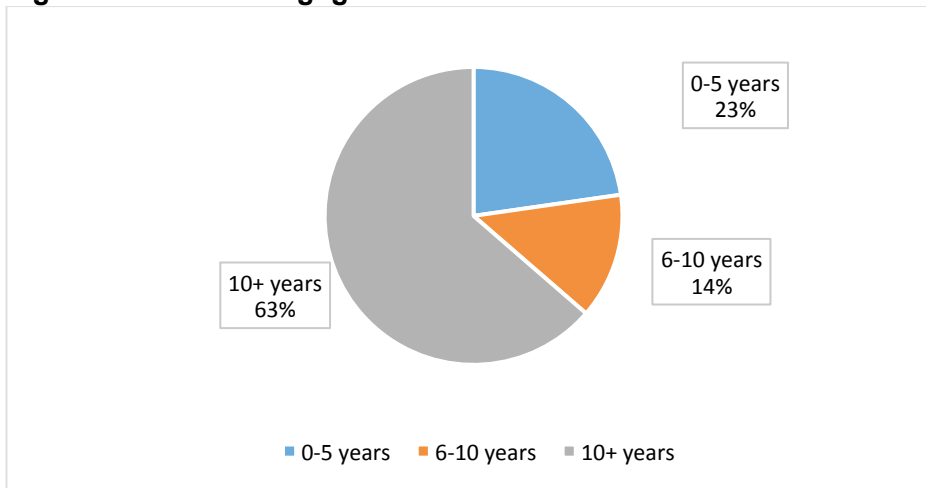
validation lead to TNE qualifications, which are easier to get recognised in Greece, in comparison to other types of TNE, where the existing legal framework is unclear (e.g. online/distance learning).

Figure 6: Type of transnational education arrangements in Greece (carried out by local partners)



Greece is a mature market for UK TNE, with 80 per cent of private colleges having collaborated with UK HEIs for more than ten years (see Figure 7). Overall, the TNE market in Greece, from the perspective of the entry and exit of local institutions, has been stable.

Figure 7: Years of engagement with transnational education activities



1.5 Fee structures of UK transnational education in Greece

Fees for students on UK TNE programmes in Greece are lower than the fees for home/EU students in the UK. Greek colleges charge between €3,000 and €9,200 for undergraduate programmes and between €4,000 and €15,000 for postgraduate programmes. The mean fees for undergraduate programmes is between €4,765

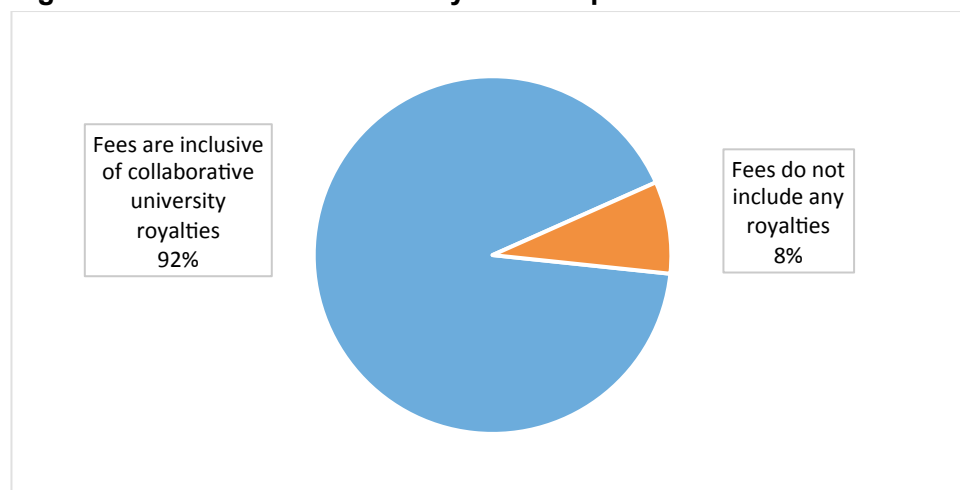
(lowest mean) and €6,970 (highest mean) and between €6,300 (lowest mean) and €9,820 (highest mean) for postgraduate programmes (see Table 4).

Table 4: Fees structures for UK transnational education programmes in Greece (in euros)

	Lowest	Mean lowest	Mean highest	Highest
Undergraduate programmes	3,000	4,765	6,970	9,200
Postgraduate programmes	4,000	6,300	9,820	15,000
PhD	8,000	8,000	8,000	8,000

More than 90 per cent of colleges quote a single fee amount to prospective students, which is inclusive of the royalties of the UK HEIs (see Figure 8). Around eight per cent of colleges quote their fees separately to the royalties of the UK HEIs.

Figure 8: Fee structures with royalties as part of tuition fees



2. Analysis of the demand of state and private institutions for transnational education programmes

This section first looks at the general demand trends for UK higher education in Greece, within the context of 1) available places in the Greek HEIs, 2) outbound mobility trends, and c) UK TNE in Greece.

It then provides an analysis of the demand of state (Greek HEIs) and private institutions (private colleges) for UK TNE programmes, respectively, with a focus on understanding the specific TNE activities and programmes that have positive prospects within the Greek higher education market.

Lastly, it explores UK HEI perspectives on 1) Greece as a TNE host country and 2) the demand for developing TNE programmes in Greece.

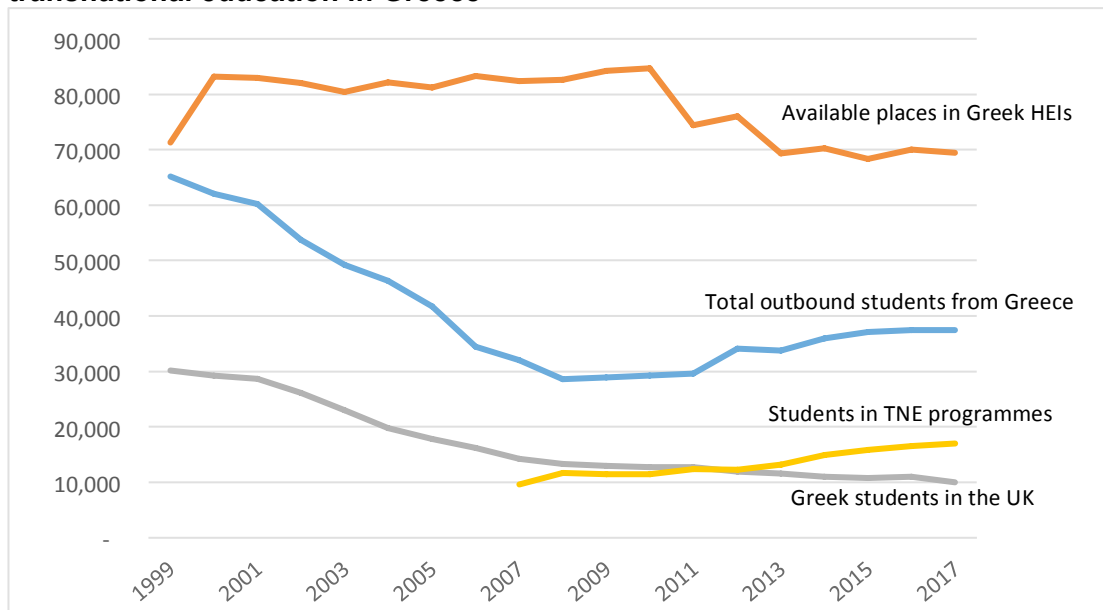
2.1 General demand trends for UK transnational education in Greece

Historically, and especially during the 1980s and 1990s, Greece has been a major source country of outbound students (Findlay, 2011). During this period, the demand for higher education in Greece was consistently higher than the available supply. This gap between supply and demand, coupled with the positive perceptions within Greek society about the quality and value of UK and US higher education systems, was the main driver for the development of TNE in Greece.

The demand for TNE in Greece is impacted directly by the number of available places in Greek HEIs (Tsiligiris, 2013). The bigger the gap between applicants and available places, the higher the demand for TNE.

Over the past 20 years, there has been a significant increase in the number of available places in Greek HEIs. For example, in 1982 there were approximately 50,000 available places, and, as shown in Figure 9 below, the number of places peaked at 84,000 in 2000. This growth, coupled with the development of TNE provision in Greece, has resulted in a decline in the number outbound students.

Figure 9: Places in Greek higher education institutions, outbound mobility and transnational education in Greece



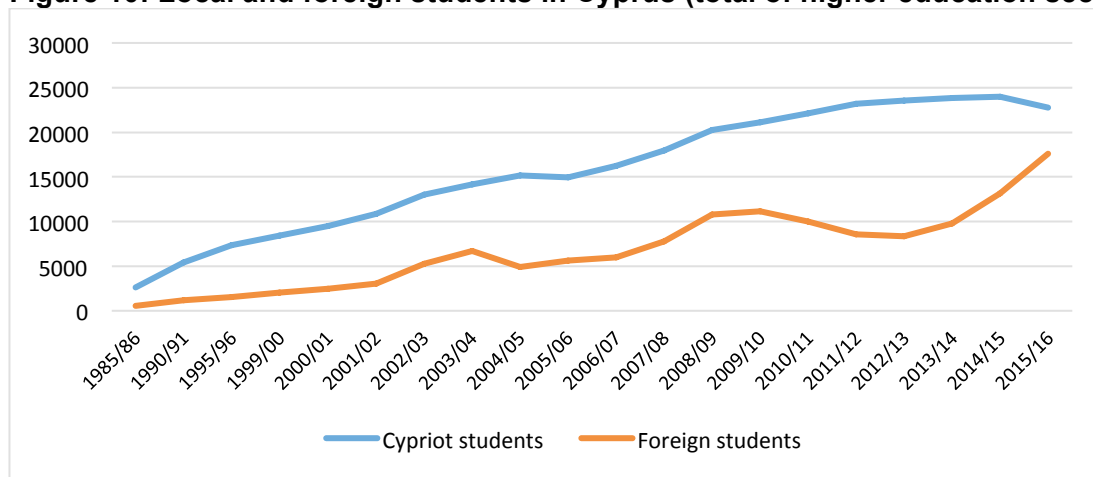
Another factor affecting demand for TNE programmes is the emergence of new destination countries for outbound students. This is particularly relevant in the case of Cyprus, which appears to have become a major destination country for Greeks.

The majority of local partners participating in this research mentioned Cyprus as the main source of competition for UK TNE in Greece. This is mainly because Cyprus has allowed the development of private universities who can offer postgraduate programmes, for which there is a strong demand in Greece. These programmes are also offered in the Greek language, and are eligible for full academic recognition by D.O.T.A.P, the Greek National Academic Recognition Information Centre (NARIC)⁶. Thus, Cyprus has created a very attractive value proposition for Greek students. This research sought to verify the claims made by local partners about the number of students from Greece who study in Cyprus.

As shown in Figure 10, over the past 20 years, Cyprus has steadily become a significant destination country for foreign students. In 2000, Cyprus had around 2,500 foreign students, while in 2015-16, there were approximately 18,000 foreign students.

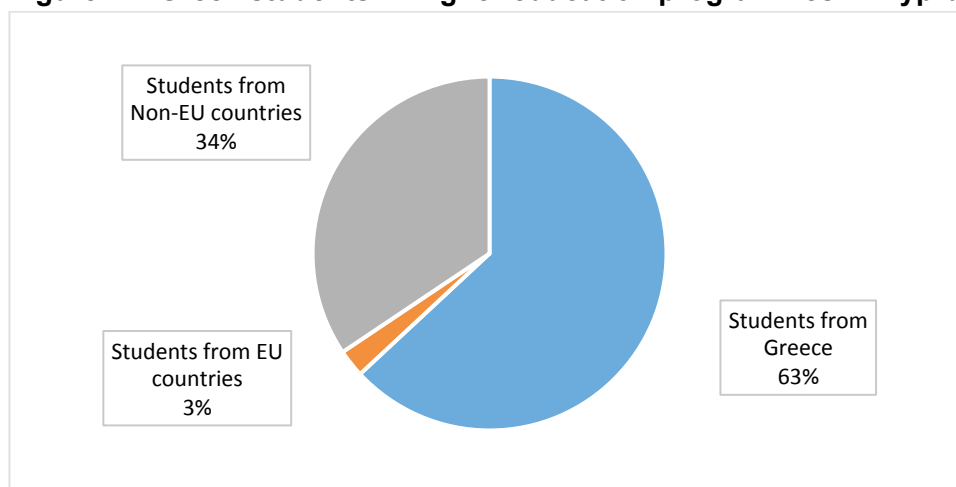
⁶ As part of the Bologna Process, each EU and EEA country has a NARIC that facilitates the comparison of academic qualifications.

Figure 10: Local and foreign students in Cyprus (total of higher education sector)⁷



Greek students account for 63 per cent of the entire foreign student population in Cyprus (see Figure 11), with 11,101 Greek students studying in Cyprus in 2015-16. It is estimated that, in 2018, this number will exceed 13,000 students. Meaning that Cyprus is now the number one destination country for Greek outbound students (UK is now the second-most popular destination country).

Figure 11: Greek students in higher education programmes in Cyprus



2.2 State higher education institutions

Research concerning the demand for TNE programmes by Greek HEIs included a questionnaire survey and personal interviews with senior executives of Greek HEIs. The selection of the sample was based on evidence of Greek HEIs' ability and willingness to engage in internationalisation activities. This was determined by evidence that indicates some engagement in internationalisation activities such as 1) research collaboration, 2) student exchange activity, 3) joint programmes, and 4)

⁷ The raw data used in this section was gathered by The Statistical Service of Cyprus http://www.mof.gov.cy/mof/cystat/statistics.nsf/populationcondition_24main_gr/populationcondition_24main_gr?OpenForm&sub=1&sel=2

programmes taught in English. Additionally, the selection targeted institutions with significant size and, therefore, impact on the Greek higher education sector. Ten interviews were conducted with rectors and vice-rectors at Greek HEIs matching the above criteria.

Greek HEIs' perception about UK higher education and UK transnational education

All respondents expressed highly positive perceptions about the quality and overall standing of UK higher education. At the same time, several rectors expressed concerns about the marketisation of higher education in the UK. Their concerns were around the lighter content of academic programmes, in comparison to programmes in Greek HEIs, and the introduction of fees that lead to high levels of student debt.

The majority of the respondents from Greek HEIs seemed to be unclear about the full spectrum of potential TNE arrangements and seemed to have negative perceptions about TNE, associating it solely to franchising. In addition, although they did not make explicit comments, they expressed negative views about the standing of TNE local partners as higher education providers.

For example, one rector stated:

'We should have allowed private universities to operate in Greece. This would have eliminated the unregulated growth and operation of several colleges of questionable quality and standing.'

Something that could explain the overall negative perception of state HEIs towards TNE and private colleges is the longstanding friction between public and private education providers in Greece (Ziguras & McBurnie, 2015). Historically, Greek HEIs have been considered as exclusive providers of higher education in Greece. This exclusivity, along with the wider perception in Greek society about a strong correlation between higher education and social mobility, has given Greek HEIs and those associated with them significant status. This status was somehow challenged with the development of the TNE sector, and particularly private colleges. As result, Greek HEIs have resisted any progress on fundamental issues of TNE activity in Greece, such as the recognition of TNE qualifications (Tsiligiris, 2015).

Drivers for developing transnational education collaboration with UK higher education institutions

Several rectors have expressed a willingness to engage in TNE activities with specific UK HEIs at the top of the university rankings in the UK.

According to the interview findings, the key drivers for Greek HEIs to establish TNE collaboration opportunities with UK HEIs are:

- to attract international students

- to acquire and develop capacity in internationalisation.

Demand for transnational education programmes by Greek high education institutions

Most Greek HEIs expressed a willingness to engage in TNE activities, but they find implementation a challenge due to resource limitations. This can be explained by two factors: 1) the total number of students allowed entry into each Greek HEI being controlled by the Ministry of Education, and 2) the no-fee policy for all undergraduate programmes in Greek HEIs.

According to Article 16 of the Greek constitution, undergraduate education is 'free for all', including EU and international students. As such, and considering that HEIs are operating at full capacity, there is no scope for Greek HEIs to seek ways of attracting undergraduate students from other countries.

Greek HEIs can charge fees only for postgraduate programmes. However, according to recent legislation (4485/17), the Minister of Education is responsible for monitoring and moderating the level of fees for each programme. According to the participants in this research, this creates a complex and inefficient process of developing and approving postgraduate programmes.

Furthermore, the same recent legislation introduced significant policy restrictions prohibiting⁸ Greek HEIs from developing undergraduate programmes offered in a foreign language. Under the legislation, the only Greek HEI with the power to develop English-language undergraduate programmes in isolation is the International Hellenic University (IHU)⁹. All other Greek HEIs can only develop such undergraduate programmes in collaboration with the IHU. As a result, in May 2018 it was announced that a collaboration between the IHU and the National Kapodistrian University of Athens will establish the first English-taught undergraduate programme in Greece (Grove, 2018).

Most respondents indicated that, despite a willingness to develop programmes in English, it is challenging to achieve this. The number of available places on undergraduate courses in Greek HEIs is determined by the Ministry of Education. Over the past 20 years, Greek HEIs have been forced to expand the number of students they admit at the undergraduate level as a result of political decisions by the different political parties in power (Katsikas, 2010). As a result, most Greek HEIs are operating at either full or near full capacity, especially at the undergraduate level. Therefore, reflecting on the existing legal framework and the capacity issues, any

⁸ Until 2017, the legal framework (4009/2011) allowed Greek HEIs to develop programmes that are offered in a language other than Greek.

⁹ <https://www.ihu.edu.gr/>

prospects for TNE collaboration by Greek HEIs is restricted to postgraduate and research programmes.

Overall, there is mixed evidence regarding the demand for TNE arrangements amongst Greek public HEIs, and it appears that the demand for and perceptions of TNE varies significantly. **The evidence shows that there is a correlation between 1) the existence of a clear and operational internationalisation strategy and 2) positive perceptions of and demand for TNE.** Those Greek HEIs with an internationalisation strategy in place demonstrate a clear demand for TNE collaboration. At the same time, those Greek HEIs who appear to be against any form of TNE collaboration are those with no clear internationalisation strategy.

For example, one rector states:

'We can develop our own programmes in English and we do not need to collaborate with any foreign institution to do this.'

But when asked to provide further information about the institutional internationalisation strategy, he added:

'We do not have a specific internationalisation strategy. We have several MoUs with foreign universities, but these are of a ceremonial nature. Any collaborations are driven by personal initiatives between individual members of staff and are around research.'

Additionally, when asked to comment about the existence of any programmes or modules in English, the same rector mentioned that there is nothing substantial in operation.

In comparison, another rector mentioned stated:

'We do have a very clear internationalisation strategy whereby we would like to collaborate with foreign universities on joint and dual degrees. Our focus is to collaborate with universities that are higher in the rankings than we are and who, therefore, will be able to help us drive our reputation up.'

During the discussion with this rector, it became obvious that there was in-depth knowledge of the local and international market, as well as consideration of the factors that affect the implementation of the institution's internationalisation strategy. Thus, there seems to be a contrast in the way that Greek HEIs approach TNE, and their internationalisation strategy plays a role in this.

Several rectors indicated their desire to engage in TNE arrangements to be able to offer joint and dual degree programmes in English. However, they indicated that the existing legal framework restricts their ability to facilitate such arrangements. Specifically, the rectors mentioned that the complexity of the legal framework about

the fee structures of postgraduate and degree programmes is a key challenge when considering TNE partnerships.

A common theme across all Greek HEIs is the prospect of developing postgraduate programmes in English. Most of the senior managers of Greek HEIs indicated that they either already offer programmes in English (although on a very limited scale) or they are in the process of developing them¹⁰.

Another common finding to come from most interviews with rectors of Greek HEIs is the view that there is an over-supply of higher education programmes in Greece. According to them, this is causing an over-supply of graduates, which in turn creates a distorted market for higher education, where prospective students do not differentiate between HEIs (e.g. accreditations and quality are not valued). This distorted market, coupled with the lack of autonomy when it comes to managing their own operations and budget, leads to a stagnation, if not a degradation, of the Greek higher sector.

Recommendations

Reflecting on the interview findings and the available data, certain recommendations can be made. Most Greek HEIs participate extensively in European research and mobility programmes. As such, they do have the resources and infrastructure to support TNE arrangements that involve the mobility of staff and students. At the same time, considering their degree-awarding status, Greek HEIs are suitable institutions to carry out advanced forms of TNE, such as double and joint degrees. Based on the above it is recommended that UUKi and the British Council could support a flagship TNE collaboration between a Greek HEI, with the appropriate strategic internationalisation focus and resources, and a UK HEI that is well-regarded in Greece. This collaboration could be at either the postgraduate or research level, and should aim to demonstrate the wider benefits of TNE, beyond student recruitment, such as the cross-cultural awareness of staff and students, internationalisation of the curriculum, and international research collaboration.

¹⁰ Up until 2017, the legal framework (4009/2011) allowed Greek HEIs to develop programmes that are offered in languages other than Greek. Certain policy restrictions were introduced with the legislation 4877/2017 that now prohibits Greek HEIs from developing undergraduate programmes offered in a foreign language. Greek HEIs can develop such undergraduate programmes only in collaboration with the Hellenic International University. Under the new legislation, this is the only Greek HEI allowed to develop undergraduate programmes in English.

2.3 Local partners (private colleges)

Data about local partners was gathered via a questionnaire survey, which was completed by 25 of the 35 licensed colleges in Greece. The survey was followed by five personal interviews. The sample for the interviews was selected based on the size of the local partner in terms of total number of UK TNE students.

Perceptions of UK higher education and UK transnational education amongst local partners

Local partners have positive perceptions about the value of UK higher education and, in particular, about the value of TNE partnerships with UK HEIs. This reflects the positive reputation of UK higher education in Greece, which is maintained and supported by an extensive Greek alumni community who have studied in the UK. Across the private sector, there is a consensus that UK TNE carries significant value, both as a driver for student demand and for operating efficiency.

According to local providers, the local TNE market is very sensitive to factors such as the academic and professional recognition of qualifications, and less sensitive to factors such as the ranking and institutional reputation of the UK HEI partner. This is largely due to the fact that Greek TNE students, and their families, who play an important role in decision-making, place more emphasis on the employability prospects a degree can offer.

In contrast, Greeks who choose to study abroad are mainly attracted by the reputation and ranking of the university (Labrianidis & Sykas, 2017)¹¹. This implies that there are two distinct student markets (TNE and outbound) in Greece for UK HEIs. UK HEIs need to evaluate the factors that drive student decision-making in each of these markets to be able to develop an attractive value proposition to prospective students.

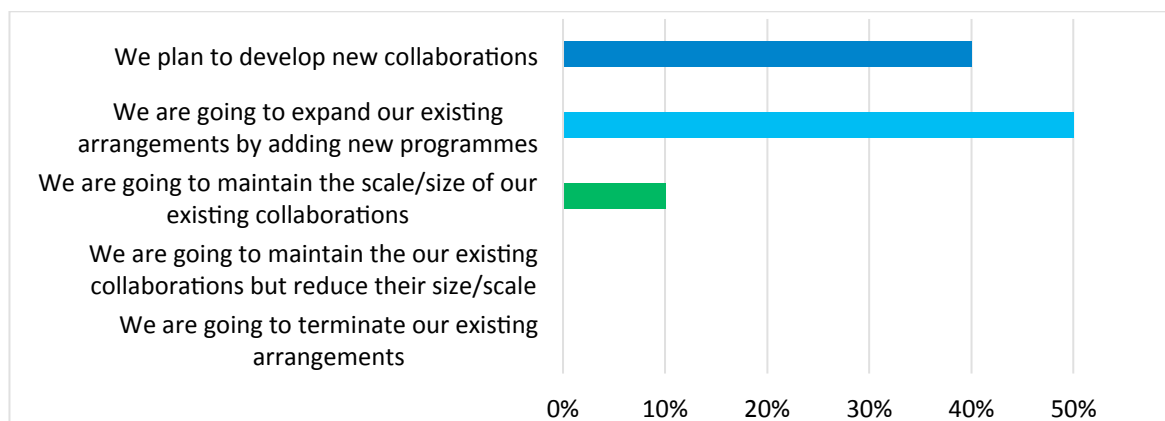
Future demand for UK transnational education amongst local partners

Private institutions stated that that key factor affecting the current and future demand for TNE programmes in Greece is competition from Cypriot, mainly private, universities. Greek students find Cyprus a very attractive study destination, mainly for postgraduate programmes, mainly because Cypriot universities offer programmes in the Greek language, and the Greek state also recognises the academic rights of Cypriot higher education qualifications. The questionnaire and personal interviews with private colleges both repeatedly demonstrated a desire amongst respondents to continue to expand their existing partnerships or develop new collaboration

¹¹ In the recent years there is an increasing number of Greeks who decide to emigrate as result of the negative employment prospects created as result of the prolonged recession.

opportunities with UK HEIs, as shown in Figure 12 below. None of the Greek colleges expressed their intentions to reduce the size of their partnerships or terminate their existing UK TNE arrangements.

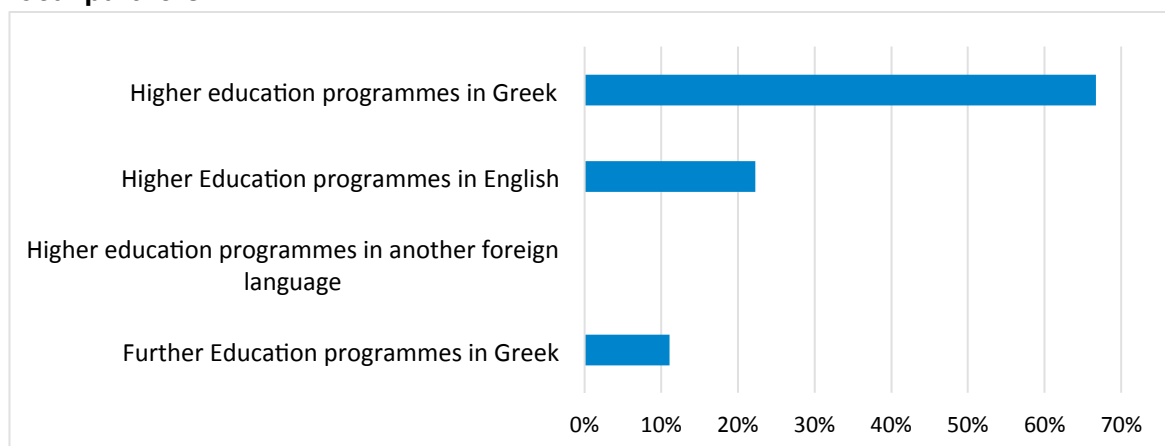
Figure 12: Plans regarding transnational education collaboration with UK higher education institutions



Level and preferred language of delivery for new programmes

In terms of the level and the language of delivery for new programmes, private colleges show a preference for higher education programmes delivered in Greek (66 per cent) over English (33 per cent) (see Figure 13). Here there seems to be a conflict between the preference of private providers and UK HEIs. The vast majority of UK HEIs who participated in this research (close to 90 per cent) chose English as their preferred language of delivery and assessment for TNE programmes in Greece and elsewhere. Also, as shown in Section 4, the majority of UK TNE students and the other students who participated in this research prefer programmes taught and assessed in English.

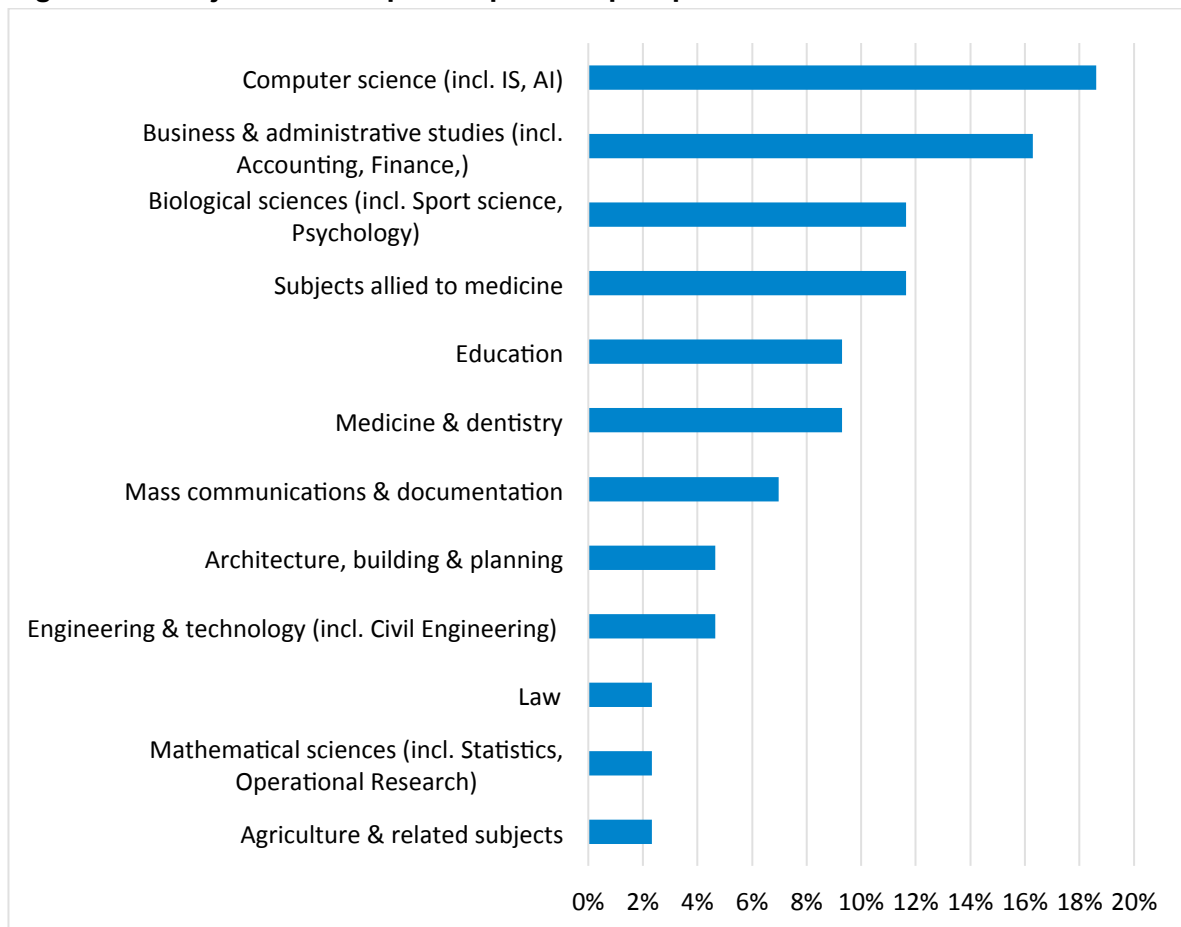
Figure 13: Preferred level and language of delivery for new programmes amongst local partners



Subjects with positive demand prospects (local partners)

Local partners indicate that the subjects with the most positive demand prospects for the future are those related to computer science, business studies, biological science (including psychology) and medicine (see Figure 14). This reflects the existing range of TNE programmes in Greece. Local partners expect computer-science-related subjects to surpass business and administrative subjects as the top subject area for TNE in Greece.

Figure 14: Subjects with expected positive prospects in Greece



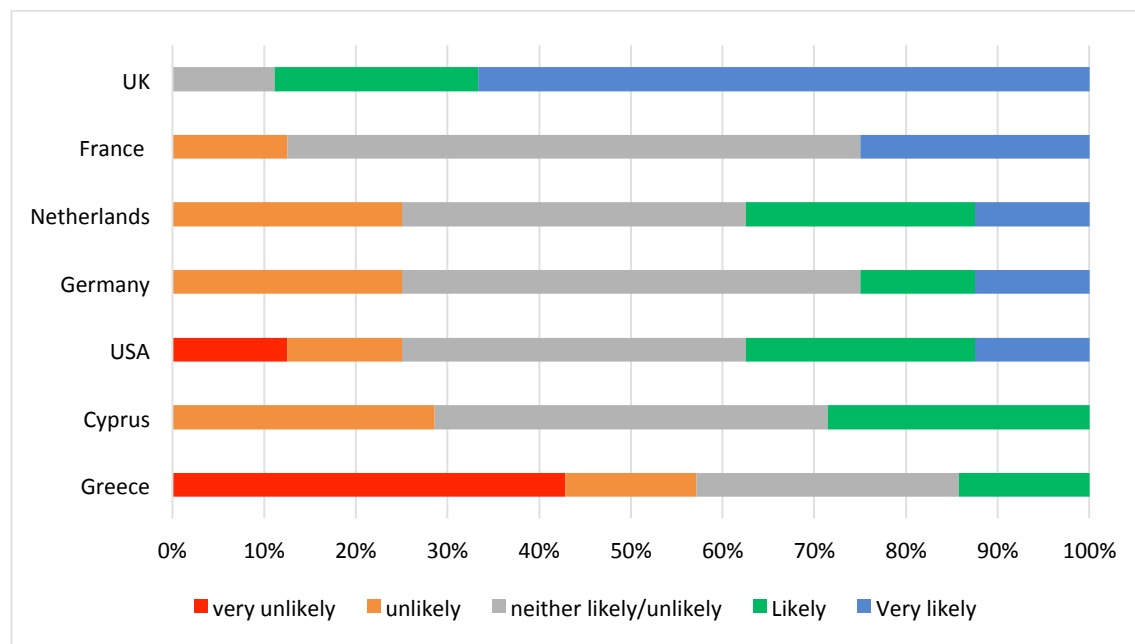
Preferred countries for future transnational education collaborations amongst local partners

Several private colleges indicated that they have been, or will be, considering alternative TNE partners in other countries. These countries, in order of preference, are 1) France, 2) Germany, 3) Netherlands and 4) the US (see Figure 15).

At the same time, however, colleges who have tried to work with partners from some of these countries (e.g. France and Ireland) reported issues with the support and expertise of the home universities in these countries. Several colleges mentioned that, despite the uncertainty related to Brexit, the UK continues to be their preferred

country for TNE arrangements. This is mainly because of the experience, organisation, support mechanisms and quality assurance processes in UK HEIs.

Figure 15: Plans regarding the country of host institution for transnational education collaboration



2.4 UK higher education institutions

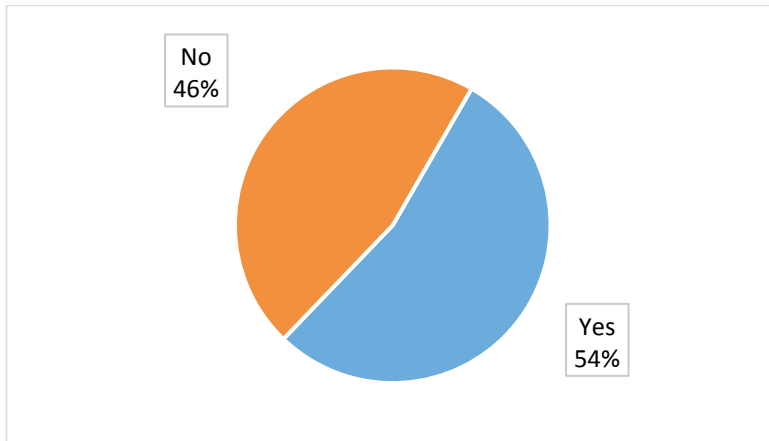
A key objective of this study is to capture the perspectives of UK HEIs regarding 1) Greece as a TNE host country and 2) the appetite for developing TNE programmes in Greece. For this purpose, a questionnaire survey was distributed to senior managers who have international strategic responsibilities at UK HEIs.

There were 51 responses from different UK HEIs. As shown in Figure 16 below, this included a balanced proportion of UK HEIs with a TNE presence in Greece (54 per cent) and those without a TNE presence (46 per cent).

This reflects of the overall market data presented in Section 2, where, according to HESA, 70 (or 43 per cent) of the total 162 HEIs in the UK have some TNE presence¹² in Greece.

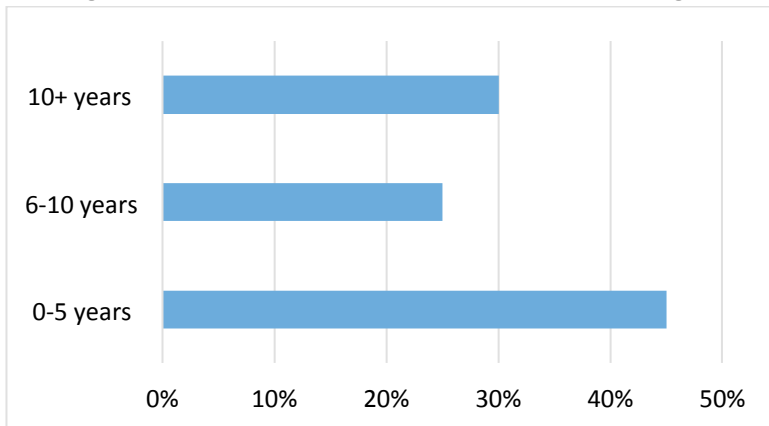
¹² This includes a large number (48, or 30 per cent) of UK HEIs with very low numbers (less than 100) of TNE students in Greece.

Figure 16: Transnational education presence in Greece amongst participant UK higher education institutions



The majority (55 per cent) of UK HEIs participating in this study have a medium (six to ten years) and longer-term (more than ten years) presence in Greece. Four in ten UK HEIs (25 per cent) have only recently (up to 5 years) developed a TNE presence in Greece (see Figure 17).

Figure 17: Length of transnational education presence in Greece amongst participant UK higher education institutions with an existing presence



The perception of Greece as transnational education host country

UK HEIs perceive Greece as a suitable host country for TNE activities. Strengths include the experience of local partners (Greek colleges) and the awareness of students and partners of the UK education model and approach. Another positive factor is the intellectual ability and dedication of Greek students. For example, one respondent stated: ‘prior experience with Greek students is positive; they are hardworking and intelligent.’ Most participants indicated that the political and economic climate increases the volatility of Greece as a TNE host country¹³.

¹³ The contextual factors that impact the growth UK TNE in Greece are explored further in Section 3 of this report.

There are mixed perceptions amongst UK HEIs about TNE market growth in Greece. Some see prospects for growth, while others see incremental growth as a result of intense competition. Several UK HEIs see Greece becoming a potential regional hub to support international student recruitment in the post-Brexit era. The City College/Sheffield partnership and its expansion to Balkan countries/Eastern Europe from its base in Thessaloniki is a good example of how Greece could become such a regional hub.

A consistent finding is that UK HEIs, both with and without a TNE presence in Greece, see a reliable local partner who is able to assure the quality of education as the key factor of TNE success.

Some UK HEIs, especially those with no TNE presence in the country, have negative perceptions of Greece as a TNE host country. This relates to the perception that TNE in Greece is mainly delivered via a franchising model, which is viewed as an inferior form of TNE. For example, one respondent described Greece as having 'lots of franchise, from UK and US institutions, which appears to be of dubious quality.'

At the same time, many UK HEIs view Greece as a host country with an appropriate learning environment and well-qualified academic staff. One respondent stated: 'in comparison to South East Asia, Greece is a good place to do business and has good colleagues of high calibre teaching.' However, several UK HEIs indicate that local partner engagement is crucial for recruiting appropriate academic staff and for enforcing staff development where needed.

The language of delivery and assessment is another factor that is seen by many UK HEIs as a source of variable expectations. UK HEIs feel local partners have a preference for programmes delivered in Greek, and feel they are less willing to offer programmes in English. This seems to impact the decision of UK HEIs with no TNE presence in Greece about whether to offer their TNE programmes in the country.

Table 5 presents a summary of the most indicative quotes for each key theme that emerged from the research about the perception of Greece as TNE host country.

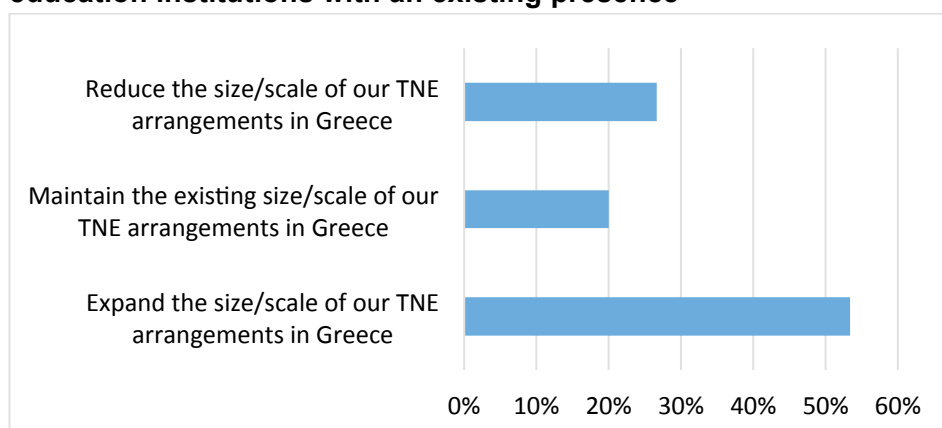
Table 5: Perceptions of Greece as transnational education host country amongst UK higher education institutions

Quote	Theme
<ul style="list-style-type: none"> Lots of franchise, from UK and US institutions, which appears to be of dubious quality 	Concerns around quality (related to franchise activity)
<ul style="list-style-type: none"> Good number of UK institutions involved, but mostly small-scale partnerships in a range of business and management areas, plus psychology/allied health sciences. Quality probably variable and needs a reliable local partner It is OK if you have the right partner (in terms of quality for us) Staff have been keen to learn regulations; they have some well-qualified staff but also some staff who have doctorates but don't understand teaching and UK requirements; the best staff are excellent to work with, but the weak staff are problematic 	Quality local partner is key for success
<ul style="list-style-type: none"> There is potential for more TNE Middle-ranking in terms of opportunity, but highly complex in terms of the competition between the private HEIs and their fraught relationships OK, but the market is likely to significantly reduce in the coming years 	Mixed views about market growth, primarily due to intense competition
<ul style="list-style-type: none"> Favourable to UK higher education, keen to expand and make Brexit-proof; there is the prospect of Greece becoming a regional hub for international recruitment, post-Brexit 	Potential regional hub post-Brexit
<ul style="list-style-type: none"> Great place to do business and with highly qualified teachers 	Favourable learning environment
<ul style="list-style-type: none"> They want programmes taught in Greek, which our university does not wish to have Good host country; some difficulties in working in English language, especially for professionally accredited programmes 	Language as an issue
<ul style="list-style-type: none"> Volatile due to political and economic climate, however prior experience with Greek students is positive, who are hardworking and intelligent Inflexible and difficult Not very stable or predictable; fairly risky 	Political and economic instability as a volatility factor

Plans for transnational education engagement in Greece amongst UK higher education institutions

The majority (73 per cent) of UK HEIs with an existing TNE presence in Greece are considering maintaining (20 per cent) or expanding (53 per cent) their TNE activities in Greece (see Figure 18). One in four UK HEIs with an existing TNE presence is considering reducing the size or scale of TNE activities. This shows that UK HEIs with an existing presence in Greece have an overall positive perception about the future course of the TNE market there.

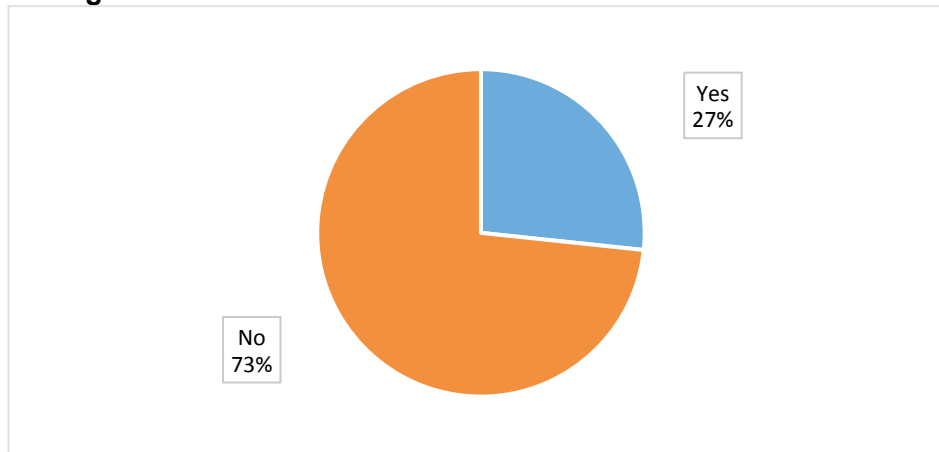
Figure 18: Plans for transnational education presence in Greece amongst UK higher education institutions with an existing presence



For UK HEIs with no TNE presence in Greece, around one in four (27 per cent) is considering establishing some form of TNE presence in the near future (see Figure 19). This is a positive indication about the expansion of the UK TNE market in Greece, considering that most UK HEIs are looking to develop a TNE presence in the South East Asia region and other markets, such as Latin America. Additionally, considering that of the 162 HEIs in the UK¹⁴, only 70 (43 per cent) have some presence in Greece, there is the potential that around 25 UK HEIs will be willing to create some form of TNE presence in Greece.

¹⁴ <https://www.universitiesuk.ac.uk/facts-and-stats/Pages/higher-education-data.aspx>

Figure 19: Plans to establish a transnational education presence in Greece amongst UK higher education institutions without a transnational education presence

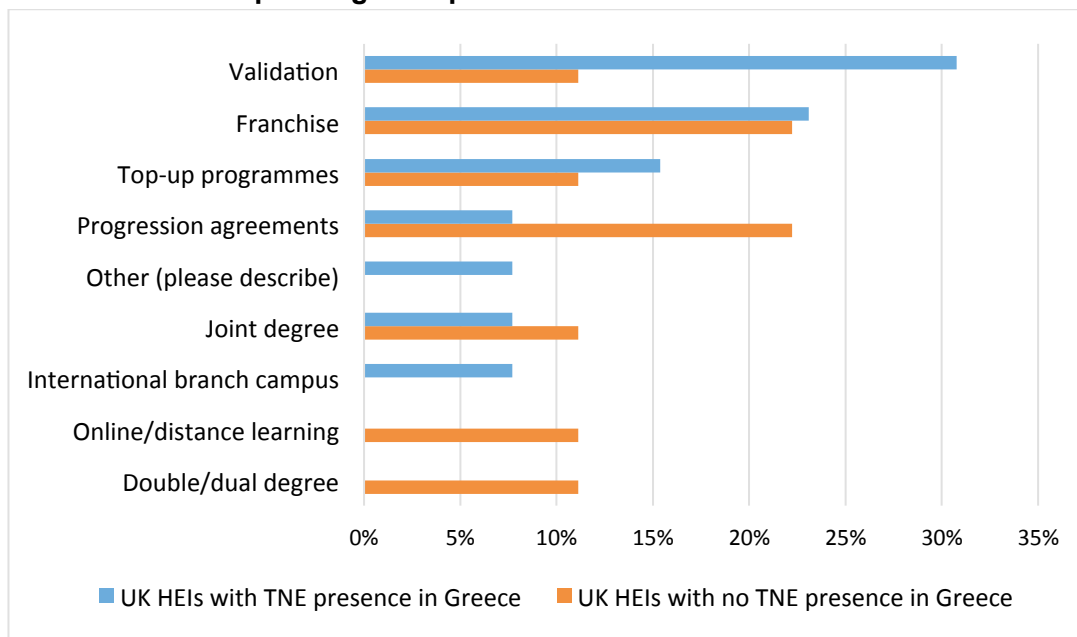


Preferred transnational education models in Greece amongst UK higher education institutions

Amongst UK HEIs, the preferred modes for expanding their TNE presence are varied. Those with an existing presence prefer validation (31 per cent), franchise (23 per cent), and top-up programmes (15 per cent) (see Figure 20). The top two modes amongst those without a TNE presence in Greece are franchise (23 per cent) and progression agreements (22 per cent). In addition, institutions without a TNE presence prefer online and double/joint degrees, which don't seem to be preferable amongst UK HEIs currently with a TNE presence in the country.

The research findings indicate the potential for two different segments of UK TNE in Greece. One segment refers to the UK HEIs with an existing TNE presence in the country. More than 50 per cent of these institutions are looking to expand their operation using 'tried and tested' models in Greece, like validation and franchising. These UK HEIs tend to have a better insight of the market dynamics and have developed valuable experience in working with local Greek partners. The other segment refers to UK HEIs with no TNE presence in Greece, who are looking to enter the Greek market by using a range of modes that reflect their appetite for risk. As a reflection of the different levels of risk associated with each TNE model (Healey, 2015), the findings indicate that UK HEIs looking to minimise risk tend to prefer progression agreements, online/distance learning, and double and joint degrees as a way to enter the Greek market. At the same time, UK HEIs willing to embark on riskier TNE ventures prefer validation and franchising.

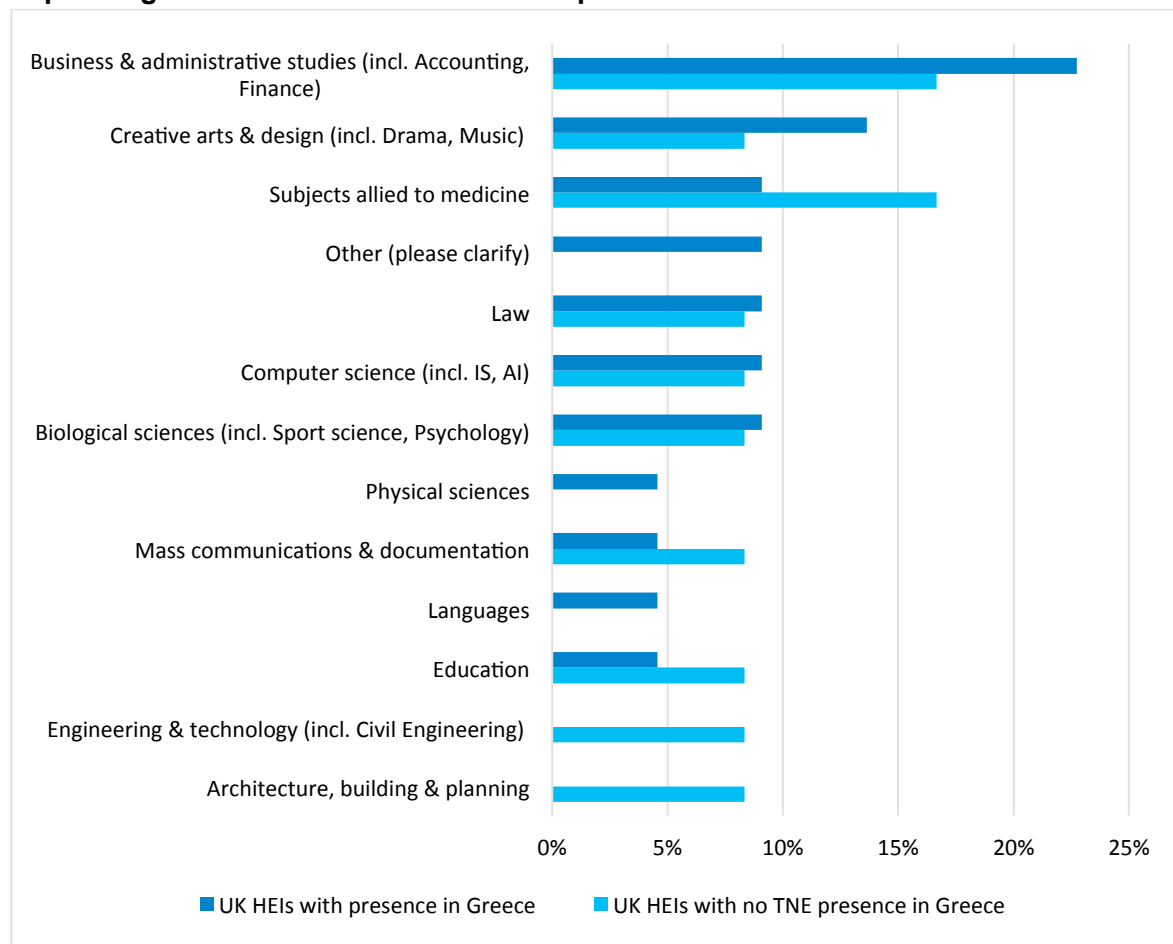
Figure 20: Preferred transnational education models amongst UK higher education institutions for expanding their presence in Greece



Subjects with positive demand prospects in Greece from the perspective of UK higher education institutions

Subjects with positive prospects according to UK HEIs coincide with the subjects indicated by local partners. UK HEIs with a TNE presence in Greece see 1) business and administrative studies and 2) creative arts and design as key subject areas for expanding their presence (see Figure 21). UK HEIs without a TNE presence see 1) business and administrative students and 2) subjects allied to medicine as key areas for establishing a presence. They are also looking to engage in subjects such as engineering, technology, and architecture, building and planning, which are not the focus of institutions with an existing TNE presence.

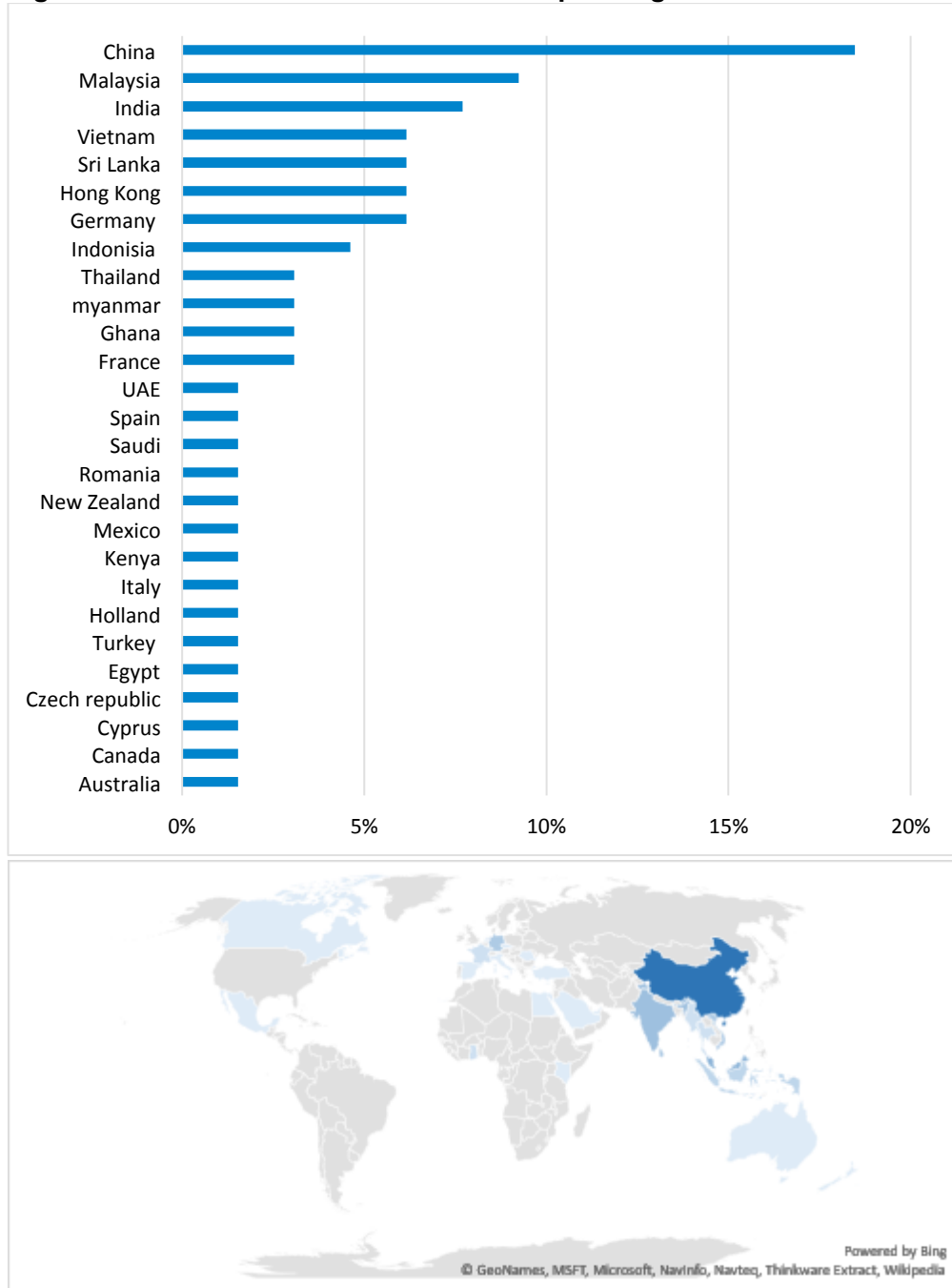
Figure 21: Preferred subject areas amongst UK higher education institutions for expanding their transnational education presence in Greece



Preferred countries for future transnational education collaboration amongst UK higher education institutions

This research also explored the countries, other than Greece, that UK HEIs are considering for embarking on TNE activities. UK HEIs indicate South East Asia as the region of priority when it comes to expanding their TNE activities (see Figure 22). China is by far the most popular TNE host country for UK HEIs, while Malaysia, India, Vietnam, Sri Lanka and Hong Kong are other popular countries. Notably, Germany is also amongst the top ten TNE host countries, which could indicate a potential shift of focus towards European countries for TNE activities within the context of Brexit (see Section 6).

Figure 22: Other countries of focus for expanding transnational education activities



3. Analysis of the financial, legal, institutional and recognition related factors that may affect growth in the sector, from both the UK and local perspectives

This section first provides a summary of the main factors relating to the growth potential of the UK TNE sector in Greece, as identified by local partners. It then explores the perspectives of UK HEIs in relation to the contextual factors that can affect the growth of UK TNE in Greece.

3.1 Local perspectives

There are a range of contextual issues that could affect the development and further growth of UK TNE in Greece. These issues were explored during the personal interviews with senior managers and owners of Greek Colleges. Below is a summary of these key contextual issues, in order of importance for respondents.

Colleges kept in the grey area of Greek higher education

Several college managers felt that, in the past, there have been deliberate attempts by the Ministry of Education to devalue colleges, and to present them as being of inferior quality to Greek HEIs. This perception has been strengthened by the prolonged delay in 1) the recognition of TNE qualifications and their integration into the National Qualification Framework, 2) the regulation of the sector and 3) the integration of colleges into Greece's formal education sector. As one College manager explained: 'colleges in Greece are like 'krifó scholió' during the ottoman occupation'. Although the historical value of this term is debated¹⁵, it accurately reflects what Ziguras and McBurnie (2007) describe as 'a shadow sector' of private providers of higher education in Greece. For many years, in an effort to manage political cost (e.g. to avoid a conflict with the public HEI community), Greek governments have overlooked the development of the TNE sector in Greece (The PIENews, 2017). For example, despite the fact that TNE has existed in Greece since the mid-1990s, it was only in 2012 that the government introduced legislation to regulate and monitor TNE partnerships (Ziguras & McBurnie, 2015). Even so, despite the volume of TNE activity in Greece, private colleges and TNE provision are still not fully acknowledged as a proper form of higher education provision (Tsiligiris, 2016).

The result of TNE operating as essentially a shadow private higher education sector in Greece for such a long time is a continued ubiquity in the Greek society's perception about the role and standing of TNE programmes. In turn, this suppresses the demand for TNE programmes and makes it more difficult for local providers to recruit students.

¹⁵ <https://www.ft.com/content/36188e7c-9169-11e6-a72e-b428cb934b78>

Impact of the financial crisis on outbound student destinations

According to the majority of college owners and general managers participating in this research, the financial crisis did not affect the number of outbound Greek students. However, the financial crisis did impact the choice of destination country. In the past, the majority of Greek outbound students went to the UK for undergraduate and postgraduate studies. From 2010 onwards, however, there has been a significant increase in the number of outbound students choosing Cyprus as a study destination. This is backed by the data held by the Cypriot statistical authority and presented in Section 2.1 regarding the number of outbound Greek students who choose Cyprus for their higher education studies. More specifically, there was a substantial increase in the number of Greek students in Cyprus between 2000 and 2015. A consistent finding during the interviews with Greek colleges was the view that if Greek colleges had been recognised as providers of higher education in Greece, a considerable number of outbound students would have stayed in Greece.

Recognition

Transnational education qualifications not being part of the recognition process

For private colleges, the main obstacle for the growth of the TNE sector is the issue of recognition. Although TNE graduates in Greece receive recognition of their professional rights within the context of EU legislation, there are several technical issues that hinder the value of their TNE qualifications. For example, SAEP¹⁶ issues a certificate for the recognition of TNE degrees, but it doesn't state the classification of these degrees. Meaning that there is no distinction between a first-class and third-class honours degree. Greek higher education degrees are classified on a scale of one to ten (5-6.49 = good; 6.5-8.49 = very good; 8.50-10 = excellent). Irrespective of the degree classification, TNE degrees in Greece are automatically classified as 5. Consequently, TNE graduates are disadvantaged in the selection process for public sector appointments, where degree classification is often one of the core criteria.

Recognition of transnational education qualifications for international students

The fact that TNE is not part of the formal education sector in Greece and, consequently, TNE qualifications lack academic recognition imposes problems for foreign students who may consider studying in Greek colleges. For example, China is often quoted as a potential source country for international students who could study in Greek colleges, yet UK qualifications obtained in Greece via TNE partnerships are not recognised in China. Students from other countries face similar problems (e.g. Cyprus does not recognise TNE qualifications obtained in Greece).

¹⁶ Stands for ΣΑΕΠ, which is the abbreviation for the Professional Rights Recognition Council.

Because TNE qualifications in Greece are not eligible for recognition by the Greek NARIC, the transferability and employability prospects that would normally be possible via the NARIC global network are restricted.

Obstacles to membership of professional bodies

Another issue of critical importance for the growth of the sector is the fact that professional bodies impose obstacles for TNE graduates to becoming members. For example, the Economic Chamber of Greece¹⁷, the professional body that governs the accountant and economist professions in Greece, has been imposing obstacles to TNE graduates who have applied to become members. Specifically, it refuses to accept the professional rights recognition provided by SAEP and instead requests¹⁸ the academic recognition¹⁹ of TNE qualifications. Another similar example is the PanHellenic Physiotherapists Association, which refuses to recognise TNE qualifications. That is despite the recommendation²⁰ in favour of the recognition of TNE qualifications issued by the Greek Ombudsman. Similar problems exist in other areas (e.g. civil engineering and psychology) where professional bodies impose similar obstacles for TNE graduates.

Being a member of a professional body is of critical importance for the employability of graduates, as it is a prerequisite for pursuing a career in certain industries (e.g. financial institutions, governmental organisations) and obtaining the licence to work as professional. As such, these obstacles affect the credibility of and demand for programmes in various subject areas.

Lack of access to practical experience and experiential learning

In a world where experiential learning is becoming the norm for both undergraduate and postgraduate provision (Roberts, 2018), TNE students in Greece don't have access to internships or any other form of practical work-based learning experiences (either private or public). Colleges flag this as another factor hindering the growth of the sector in Greece, as one college general manager explained:

¹⁷ <http://www.oe-e.gr/>

¹⁸ For the specific requirements see here (in Greek): <http://www.oe-e.gr/news/to-o-e-e-/isxuon-nomothetiko-plaisio/meli-tou-oee/proupotheseis-eggrafis-melous/432>

¹⁹ This is something which is not possible as it is provided by the Greek NARIC D.O.A.T.A.P, which explicitly state that '*studies in partnerships of foreign universities in Greece do not fall within the legal provisions about recognition of academic qualifications by [Greek] NARIC. The founding law 3328/2005 of NARIC about the recognition of degrees from foreign universities, requires that the total of studies should have taken place at the main campus of the foreign awarding institution*'. [Note: translated from Greek].

²⁰ <https://www.synigoros.gr/resources/20180207-synopsi.pdf>

‘Our students are not able to be present in a business environment without previously being employed and fully insured by the organisation. This means a substantial cost (around €500) for an organisation that accepts a TNE student on a practical experience programme. In contrast, students from institutions like Institutions of Vocational Training (Idrymata Ekpaideftikis Katartisis) and Technical Education Institutions (Technologika Ekpaideftika Idrymata) are able to participate in practical experience programmes without the need for organisations to employ and insure them.’

This lack of access to appropriate practical and experiential learning opportunities for UK TNE students in Greece has a direct impact on the viability of programmes where working experience is an inseparable part of the curriculum. For example, courses such as nursing, physiotherapy, counselling, psychology, and others, are based on extensive aspects of experiential learning. This creates problems for local partners who must use a significant amount of resources in identifying ways students can gather the necessary practical experience.

Recommendations

While, in recent years, there has been significant progress in terms of the recognition of TNE qualifications in Greece, the evidence suggests that there are still issues to be resolved. Qualitative aspects, such as degree classification and the wider status of the recognition of professional rights in Greece, impact the standing and reputation of the TNE sector. This, in turn, undermines the growth prospects of the market and channels the strong demand to alternative markets (e.g. private universities in Cyprus). As such, resolving the recognition issue is of critical importance for the viability of the UK TNE market in Greece. It’s an issue that impacts the core of the ‘value for money’ proposition of UK HEIs with a TNE presence in the country. Therefore, it should be seen as an issue of critical importance for UK higher education in the context of assuring student experience standards and employability prospects that are comparable to those of students who study at the home campus.

3.2 Perspectives of UK higher education institutions

This section presents the perspectives of UK HEIs on the wider contextual issues impacting on the growth of the UK TNE in Greece.

Overall, UK HEIs seem to consider the policy environment and the economic climate as the two most influential adverse factors for TNE growth in Greece. In contrast to the factors mentioned by local partners (see Section 3.1), UK HEIs do not mention the issue of the recognition of TNE qualifications. This may be linked to the complexity of the Greek policy environment, which is extremely difficult to navigate. Also, it may suggest that local recognition issues are considered in depth in the due

diligence and decision-making process, and the existing arrangements are satisfactory for UK HEIs. Considering the importance of the recognition of TNE qualifications for TNE students in Greece, there may be scope to increase the awareness amongst UK HEIs on the specifics of the professional recognition framework. Equally, this will also enable UK HEIs to be more appreciative of the local/contextual issues in the host country that may affect the experience of TNE students and urge them to work more closely with local partners for further improvements. The key findings are discussed below and summarised in Table 6.

Unfriendly and complex policy environment

UK HEIs with an existing presence in Greece indicate shifting government regulations as the main challenge in setting up and managing TNE arrangements. Specifically, UK HEIs indicate that the complexities, rigidities and frequent changes in legislation around TNE creates a policy environment that is unfriendly and difficult to navigate. The existing policy environment seems to undermine TNE market growth prospects. This growth could materialise if the legal framework allowed for the establishment and operation of TNE models currently not offered in Greece. For example, since Greek colleges are not able to have degree-awarding powers, UK HEIs can't leverage their TNE operations in Greece and develop double/joint degrees or top-up programmes.

Effects of the economic climate on future demand and cost

Alongside the unfriendly and complex policy environment, UK HEIs consider the economic climate, which emerged out of the prolonged Greek public debt crisis, as a major factor affecting the growth of the TNE market. Specifically, UK HEIs indicate that, as result of the economic climate, students have become more cost-sensitive and, consequently, there is an impetus on local partners to lower fees for TNE programmes. This reduces the financial resources available at both ends of the collaboration, and strains existing resources (e.g. administrative support, academic teams, IT infrastructure). Also, in comparison to other TNE host countries, Greece is becoming less attractive for UK HEIs within the context of lower local fees. However, as identified earlier (Section 2.4), UK HEIs consider the demand for TNE programmes in Greece as strong and expect this to continue to grow in the future.

Strategic issues internal to the home institution

Some UK HEIs suggest that strategic issues that are internal to the home institution may impact TNE growth, in Greece and elsewhere.

One issue could be that the home institution has no clear internationalisation strategy or clear direction on how to achieve growth in TNE activities. Respondents also noted frequent changes in the internationalisation strategy of the home

institution as a factor that could impact the long-term growth of TNE. For example, one responder mentioned: *‘with the arrival of our new vice-chancellor, there was a change in the internationalisation strategy, which meant we could no longer pursue franchise activity. That was despite the fact we had an extensive, and largely successful, franchise TNE provision.’*

Other issues arise from differences in the priorities around TNE activities between different departments and schools at the home institution. For example, there may be scope to expand an existing TNE arrangement in Greece by adding programmes from another school. But this is not always straightforward, due to the different TNE approach taken at the school level.

Complexity of the Greek transnational education market

Another issue affecting the growth potential of TNE in Greece is the complexity of the Greek TNE market and the range of factors that affect the success of TNE provision. Several UK HEIs indicate the need for deeper, more thorough due diligence as a pre-requisite for establishing and developing a sustainable TNE presence in Greece. For example, there are often unrealistic expectations from both sides of the collaboration (UK HEIs and local partner) that relate to 1) student numbers and 2) the engagement and responsibilities of each party.

Table 6: Summary of the perspectives of UK higher education institutions on contextual factors affecting the growth of transnational education in Greece

Quote	Theme
<ul style="list-style-type: none"> The model of TNE we have developed means the main challenges are internally within our own institution as opposed to within Greece 	Issues internal to the home institution
<ul style="list-style-type: none"> The current economic situation in Greece means that they are very price conscious; it can be challenging to ensure that the partnership is financially viable for both parties Low fees and a drive to deliver in Greek; there is also clear marketing evidence that numbers engaging with higher education will drop as the economy moves forward Relative student fees (much lower in Greece) Intense competition in the Greek private college sector means programmes are requested for validation late Student recruitment and cost The economic climate in Greece continues to be a challenge Greek culture of payments: lots of late payments, reasons including capital controls, campus expansions and cash flow 	Economic climate
<ul style="list-style-type: none"> Shifting government regulations in Greece mean we have to modify progression programmes often/quickly to ensure equivocation Unfriendly policies, political instability, bureaucracy Rigidity of the Greek system in not allowing top-up degrees Governance generally (as our set up is between franchise and validation) 	Policy environment
<ul style="list-style-type: none"> Clarity in understanding the level to which formal due diligence can capture the 'background' business activity of the private education sector Understanding the complexities of the relationships between the various private institutions in what is clearly a highly competitive market Getting beyond the headlines in understanding how the TNE market might work in-country It is also important to ensure that the expectations of each party are shared and agreed 	Complex market conditions

Recommendations

There is scope for the British Council to consider offering TNE market intelligence services to UK HEIs that go beyond the typical market profiling. Instead, there is a need for market intelligence that takes into account the contextual factors and source information from all stakeholders.

4. Student decision-making process for transnational education programmes in general, and during the transition of the UK's withdrawal from the EU

This section presents focuses on the student dimension of UK TNE in Greece, to develop a greater understanding of the decision-making process in relation to TNE programmes.

It explores:

- 1) The experience of existing UK TNE students in Greece.
- 2) TNE students' perceptions about UK TNE.
- 3) Other students' perceptions about UK higher education.
- 4) The decision-making process of UK TNE students when selecting a programme and institution.
- 5) The future demand and preference for UK TNE programmes in Greece.

To capture the student dimension of the TNE market in Greece, the research gathered data from different segments of the student population in Greece. This was necessary for two main reasons.

Firstly, to balance out the potential confirmation bias²¹ of existing UK TNE students. For example, existing UK TNE student may, consciously or unconsciously, tweak their responses around student experience and overall perceptions of UK TNE to prove they have made the right choice of programme/institution.

Secondly, exploring all segments of the student market in Greece is paramount to identify future demand trends, which is one of the key objectives of this study.

Thus, the study includes two main groups of students: 1) **UK TNE students** and 2) **other students**. UK TNE Students are students who study on a UK HEI's programme offered in Greece through a TNE arrangement with a private (Greek college) or state (Greek HEI) institution.

Other students include four segments of the student market in Greece:

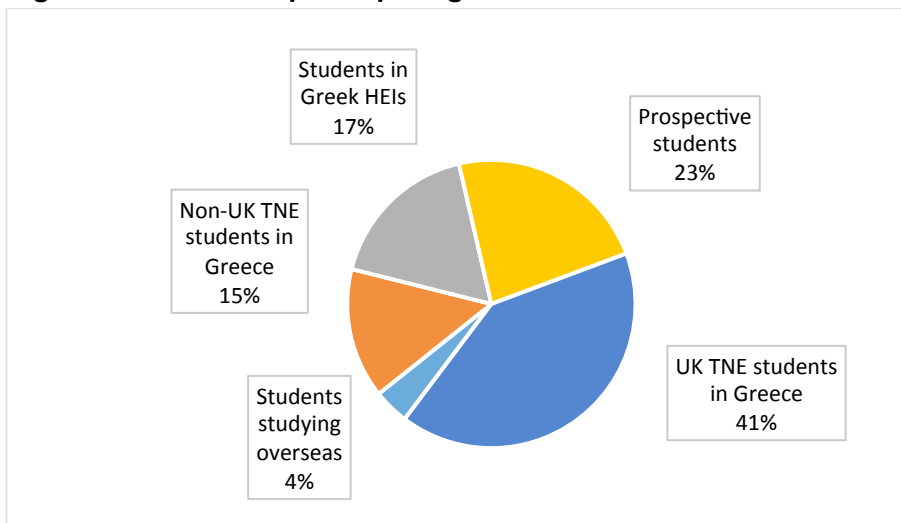
- a) Non-UK TNE students. These are students who study on a foreign, non-UK, HEI programme that is offered in Greece through a TNE arrangement with a private (Greek college) or state (Greek HEI) institution.
- b) Students in Greek HEIs.

²¹ From Encyclopaedia Britannica: **Confirmation bias**, the tendency to process information by looking for, or interpreting, information that is consistent with one's existing beliefs. This biased approach to decision making is largely unintentional and often results in ignoring inconsistent information. Existing beliefs can include one's expectations in a given situation and predictions about a particular outcome. People are especially likely to process information to support their own beliefs when the issue is highly important or self-relevant.

- c) Prospective students. These are students who are actively seeking to continue their studies, either at the undergraduate or postgraduate level, within the next year.
- d) Students studying overseas.

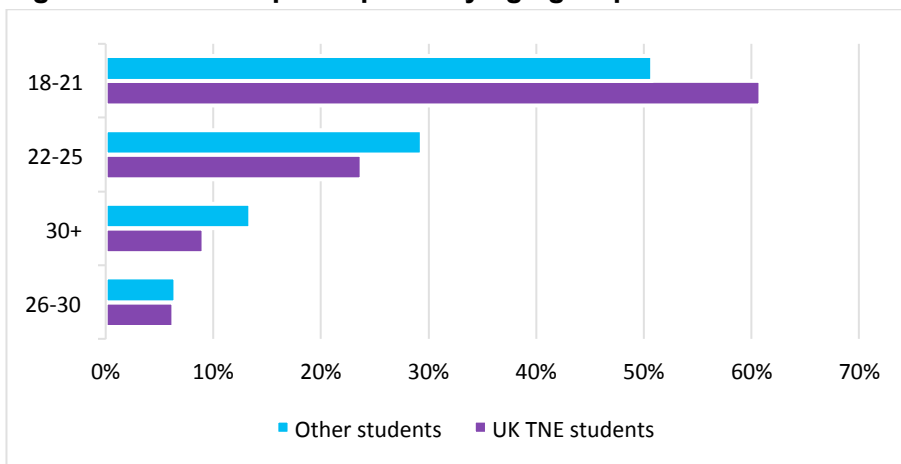
The questionnaire survey was distributed through the following channels: 1) local partners, 2) Greek HEIs, 3) the Hellenic College Association and 4) the British Council in Greece. There were 520 valid responses, and participation in the survey consisted of 41 per cent UK TNE students and 59 per cent other students (see Figure 23).

Figure 23: Students participating in the research



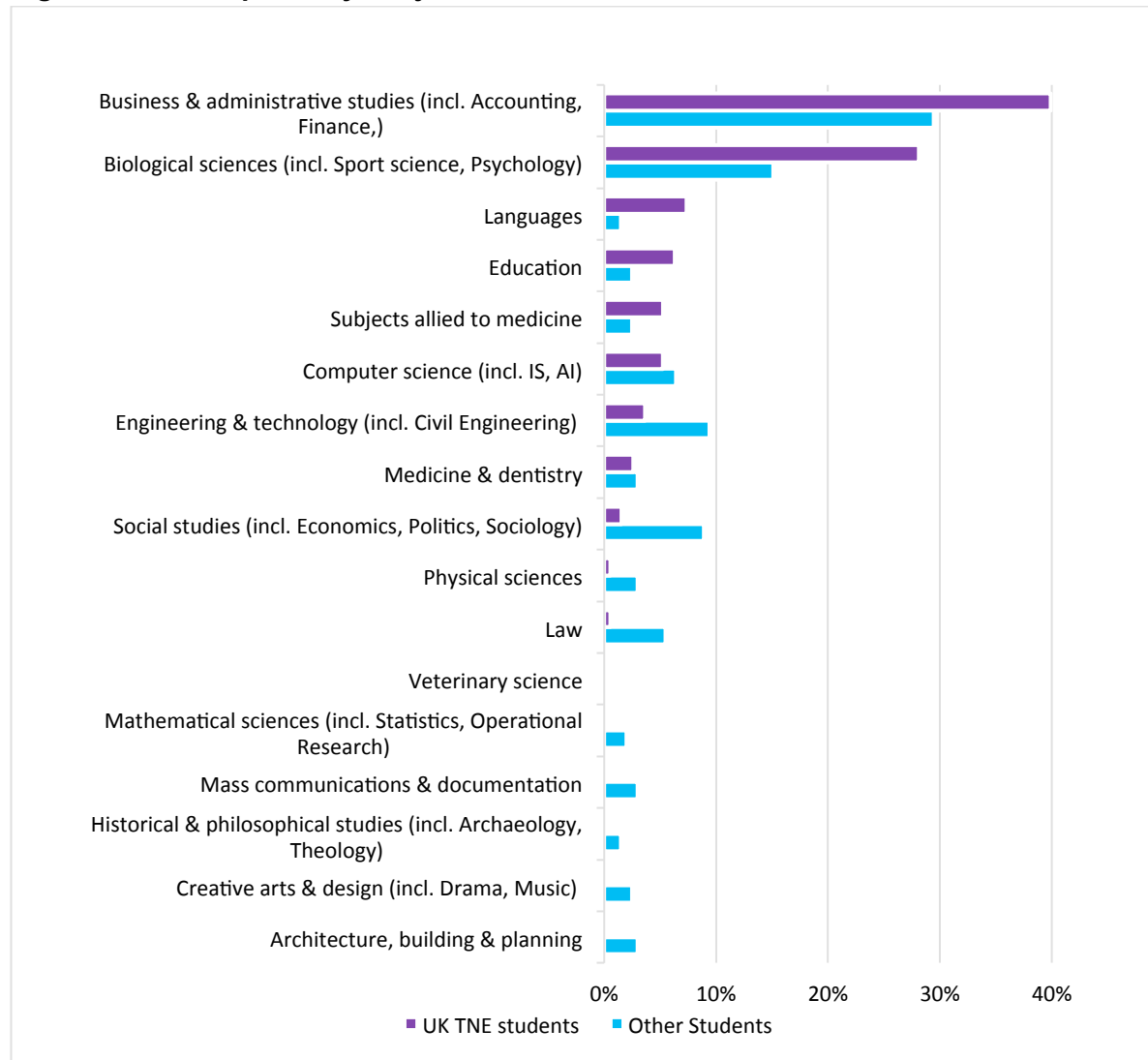
The majority of student participants were aged between 18 and 21 (see Figure 24). This reflects the composition of the student market in Greece, which is mostly at undergraduate age.

Figure 24: Student participants by age group



Participating students are pursuing subjects that reflect the overall UK TNE and Greek higher education market. Specifically, as show in Figure 25 below, the majority of participants are students in business/administrative studies and biological sciences, coinciding with the two most popular subjects by total number of TNE students in Greece (QAA, 2016:p.4).

Figure 25: Participants by subject area



4.1 Experience of UK transnational education students in Greece

Previous research in Greece (Tsiligiris, 2015) found that word-of-mouth is key in the decision-making process of TNE students in Greece. The research also showed that word-of-mouth is directly associated with student experience. Therefore, in an effort to establish a greater understanding of the decision-making process of TNE students, it is important to investigate the student experience of these students. The key findings are discussed below and summarised in Figure 26.

Overall satisfaction with current programme/institution

The majority (55 per cent) of UK TNE students appear to be satisfied with their existing student experience, and would recommend their programme/institution to prospective students. This is significant, as one of the major influences on the decision-making process for prospective TNE students is recommendations from friends and family (see Section 4.5).

At the same time, since 17 per cent of students feel unsatisfied with their overall experience, one may argue that there is still room for improvement in relation to student experience. This could potentially lead to improvements in reputation, word-of-mouth and, consequently, demand for UK TNE programmes in Greece. This research explored the potential areas for improving student experience, and these are presented later in this section.

Satisfaction with choosing UK transnational education as a study option

As shown in Figure 26 below, most UK TNE students feel they made the right choice by staying in Greece on a UK HEI programme. They appreciate the benefits of TNE as mode of higher education provision, as well as the quality of the UK higher education system.

Some of the comments made by students were:

- 'It allows you to study in an international education environment. The college has students from 25 different countries. Additionally, the faculty is diverse and includes academics and professionals from Greece as well as other countries. The colleges, and the programme I study, allow me to get a UK higher education degree at a significantly lower cost in comparison to studying in the UK.'
- 'The knowledge we acquire is of a different level and focus in comparison to Greek HEIs.'
- 'The use of English as language of teaching allows us to practice and develop a high level of fluency that will be useful to those who want to continue their studies or work abroad.'

Student perceptions about the quality of UK higher education in comparison to Greece and other countries

As previously mentioned, UK higher education is perceived positively in Greek society. This is reflected in the results of the student survey, where more than 50 per cent of UK TNE students feel that the quality of the UK higher education is superior to that of Greek higher education.

At the same time, when students were asked to evaluate the quality of UK higher education in relation to other countries, only one in four (24 per cent) indicated that they considered it superior. This could be considered within the context growing competition amongst countries in attracting international students and/or as exporters of higher education programmes.

Employability

The majority of students (43 per cent) are unclear on whether their UK degree will give them better employment opportunities in comparison to a degree from a Greek HEI. This reflects, at least, two main issues: 1) the varied and unsettled way TNE qualifications are recognised in Greece and 2) the distorted employment market in Greece, where there seems to be a broken link between qualifications and employment opportunities and pay. This is an important factor, as it creates significant ramifications for UK HEIs. In the context of increased awareness about value for money and employability in the UK, UK HEIs should take active steps to improve the employability of their TNE students in Greece.

Support by home institution

Compared to other aspects already discussed, UK TNE students in Greece seem to be less happy about the support they receive from the UK university. As shown in Figure 26, only 37 per cent of UK TNE students feel they have received appropriate support from the UK HEIs. Several students indicated that they would value more opportunities for engagement with the home institution as part of their studies.

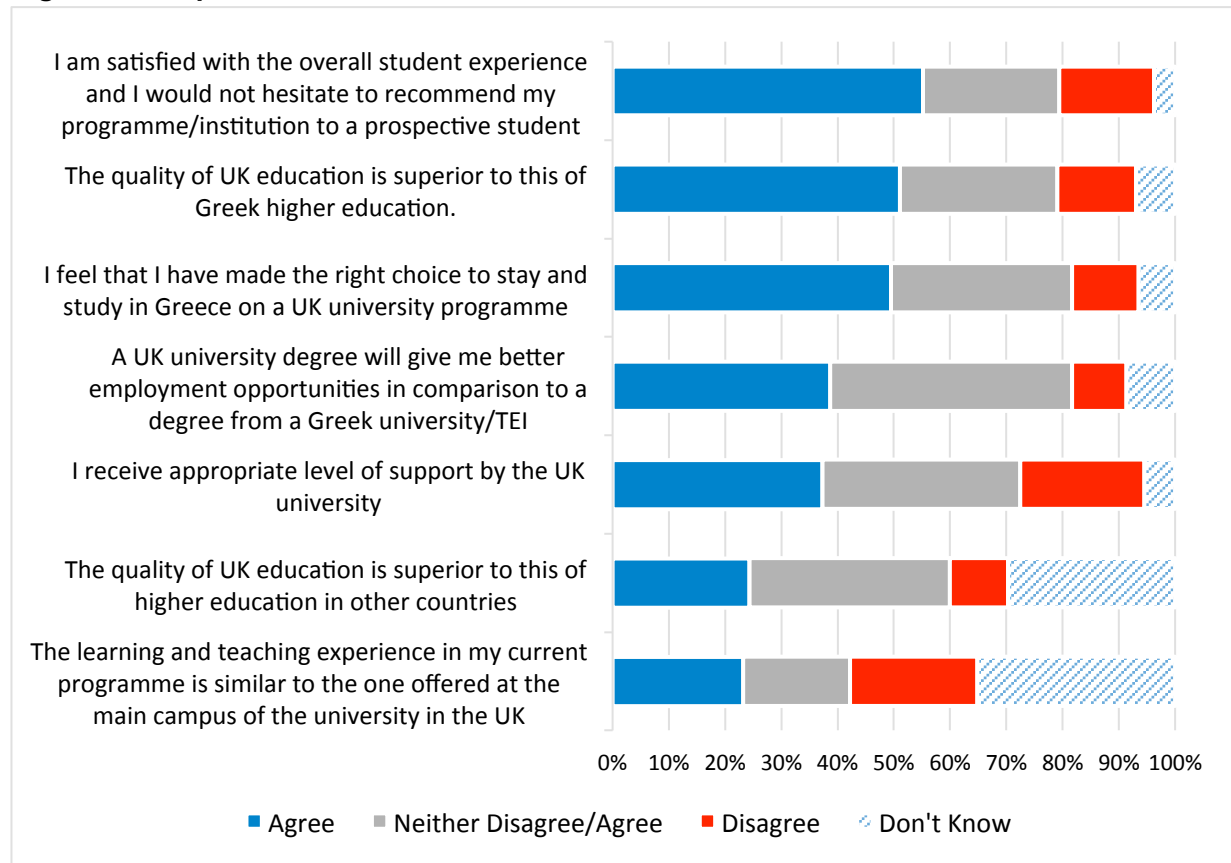
The low engagement and contribution from awarding institutions is an issue that has been identified in other research across a range of UK TNE host countries (Mellors-Bourne, Jones & Woodfield, 2015). Exposing TNE students to the learning and teaching environment of the home institution has multiple benefits. It develops a stronger connection between TNE students and the home institution, enabling them to feel part of the wider foreign university community. This adds significantly to improving the perception of TNE students as being students of the home institution. Additionally, this allows TNE students to adjust their expectations around contact time. By studying in a smaller-scale private institution and without direct comparison, TNE students often form unrealistic expectations about contact time (Tsiligiris, 2015).

Transnational education student experience compared to student experience in the main campus

UK TNE students were largely unable to compare their experience to that of students studying in the main university campus, mainly due to a lack of mobility arrangements between local partners and UK HEIs. Since private colleges in Greece are not part of the formal education sector, they cannot participate in student mobility

activities under the European Union Erasmus programmes. Therefore, any student mobility elements are not financially viable. This is another example of how a legal/policy aspect affects the core of the student experience for those on TNE programmes.

Figure 26: Experience of UK transnational education students in Greece



Recommendations from UK transnational education students to improve student experience

This research explored the areas that UK TNE students in Greece would like to see improved. The key issues, as presented in Table 7 below, can be summarised into three main themes: 1) academic delivery, 2) organisation and 3) support.

UK TNE students suggest improvements that relate to programme design (electives, working experience opportunities), the model of delivery (contact hours, interaction with the UK HEI academic staff, practical case studies), and the quality of academic staff.

Some of these issues, such as the need for more electives and contact hours, are common issues identified by students in the UK (Neves & Hillman, 2017). This can be explained within the context of the traditional view that value for money is linked to the amount of contact hours. Considering that the teaching model is driven by the

programme design and approach of the UK HEI, local partners have little influence on this. At the same time, previous research has shown the Greek colleges tend to provide more contact hours than required by the UK HEI programme.

Local partners can utilise an induction programme aimed at shaping and managing student expectations about contact time and range of available electives. For example, this can be an induction programme explaining the learning and teaching model within UK higher education, and the role of students as independent learners.

Students appeared to be happy with the level of quality of academic staff at local partner institutions. However, several UK TNE students mentioned that achieving consistency in the quality of academic staff²² would improve their student experience.

An effort to standardise the profile of academic staff in relation to their teaching skills will improve the experience of UK TNE students in Greece. This can be achieved by adopting the use of the UK Higher Education Academic Fellowship²³ scheme. This would bring benefits not only to the student experience, but across a number of areas within UK TNE activity in Greece. For example, it would simplify the quality assurance and accreditation processes in relation to the teaching ability of local academic staff. It would also give local partners a simplified and consistent way to ensure new members of academic staff have the teaching skills required.

Some areas for improvement relate to policy issues. For example, the integration of work experience opportunities within TNE programmes is not fully feasible under the existing legal framework (see Sections 3.1 and Section 5.1). Therefore, if these longstanding policy issues are resolved, it will lead to improvements in the experiences of UK TNE students in Greece.

The majority of UK TNE students appear to be happy with the facilities and buildings of the local partner institutions. At the same time, students would prefer facilities and buildings at a similar scale to those of the UK university.

²² According to the existing regulation, the Greek Ministry of Education maintains a register of all academic staff who teach on TNE programmes in Greece. The process for someone to enrol on this register involves an application and submission of academic qualifications. There is no formal requirement for a teaching qualification. However, it should be noted that a teaching qualification is not widely adopted by Greek HEIs as a requirement for their academic staff. Also, in Greece, there is only one formal course leading to a recognised teaching qualification for further and higher education.

<http://www.aspete.gr/index.php/el/%CF%83%CF%80%CE%BF%CF%85%CE%B4%CE%AD%CF%82-%CF%84%CE%BC%CE%AE%CE%BC%CE%B1%CF%84%CE%B1/2016-06-16-14-40-50.html>

²³ <https://www.heacademy.ac.uk/individuals/fellowship>

Table 7: Aspects and areas for improving the current student experience

Academic delivery
More available choices of elective modules
More contact hours
More communication between academic teams in Greece and the UK
Consistency in the quality of academic staff
More interaction with academic staff from the UK university
Integration of work experience opportunities (e.g. internships, placements)
Use of more practical case studies related to today's business environment
Organisation
Facilities/buildings that replicate the UK higher education experience
Access to appropriate software
More empathy from senior management towards students
Support
Access to Erasmus
More effective and comprehensive career days
Closer ties with the UK university
More clear pathways for continuing or completing part of studies at the UK university
Being part of the student community at the main campus
Recognition of TNE students as higher education students in Greece to gain access to discounted travel and other benefits enjoyed by Greek HEI students

4.2 Perceptions about the strengths and weaknesses of UK transnational education in Greece

In an effort to identify student perceptions about the value of their experience, the research investigated what students see as the key strengths and weaknesses of UK TNE in Greece (Table 8).

UK TNE students have an overall positive perception about UK TNE provision in Greece. Specifically, UK TNE students appear to appreciate the organisation and education model of UK higher education programmes, as well as the 'value for money' proposition of TNE provision. In addition, students consider the options it provides for further study and employment abroad as a key strength.

On the negative side, students identify weaknesses that relate to 1) the recognition of TNE qualifications, 2) the level of support/engagement from the UK HEI, 3) the academic content of the programme and 4) the quality of academic staff at local partner institutions.

Table 8: Key strengths and weaknesses of UK transnational education in Greece from the UK transnational education student perspective

Strengths	Weaknesses
<ul style="list-style-type: none"> • Attractive ‘value for money’ proposition as it allows to study for a UK higher education degree while staying at home and at a lower cost • Value of UK degree • Organisation of academic delivery • Smaller classes and, therefore, a more personalised experience • The use of English language (for students who study on programmes that are delivered and assessed in English) • Practical knowledge and assessment • Assessment strategy involving multiple assessment points (in contrast to Greek HEIs, where the main method of assessment is exams) • Student-focused approach • Positive prospects for further studies (mainly abroad) • Strong employability prospects (mainly abroad) • Organisation and consistency • More affordable than studying in the UK, better than Greek private education 	<ul style="list-style-type: none"> • Limited UK university involvement • Recognition of degree in Greece²⁴ • Academic staff at the college should be more informed about the programme structure and module requirements • The material should be adapted or developed by local academic staff, giving them more ownership and knowledge of what and how it is taught • Fees are not that low for what the college offers • Some instances where concerns about the quality of academic staff were raised²⁵ • Programme content is often too generic and lacks depth, in comparison to the programmes offered by Greek HEIs • Unclear prospects for recognition of qualification (e.g. for academic and employment purposes) • Not enough contact hours • Instances of inconsistent application of assessment standards • Shortage of resources (e.g. buildings, library, virtual learning environment)

4.3 Perceptions of other students about UK higher education and UK transnational education in Greece

It is important to grasp the perceptions and preferences of ‘other students’ as a way of creating a more holistic picture of the student market in Greece. This will enable home and host institutions to develop actions targeted at increasing their market penetration by acquiring part of the ‘other students’ market.

²⁴ Overall, students recognise the progress in the recognition of professional rights. However, they do express concerns about the limitations in achieving full professional rights (e.g. registering as members of professional bodies) and academic recognition. This is something the students feel undermines the overall status of TNE degrees in Greece

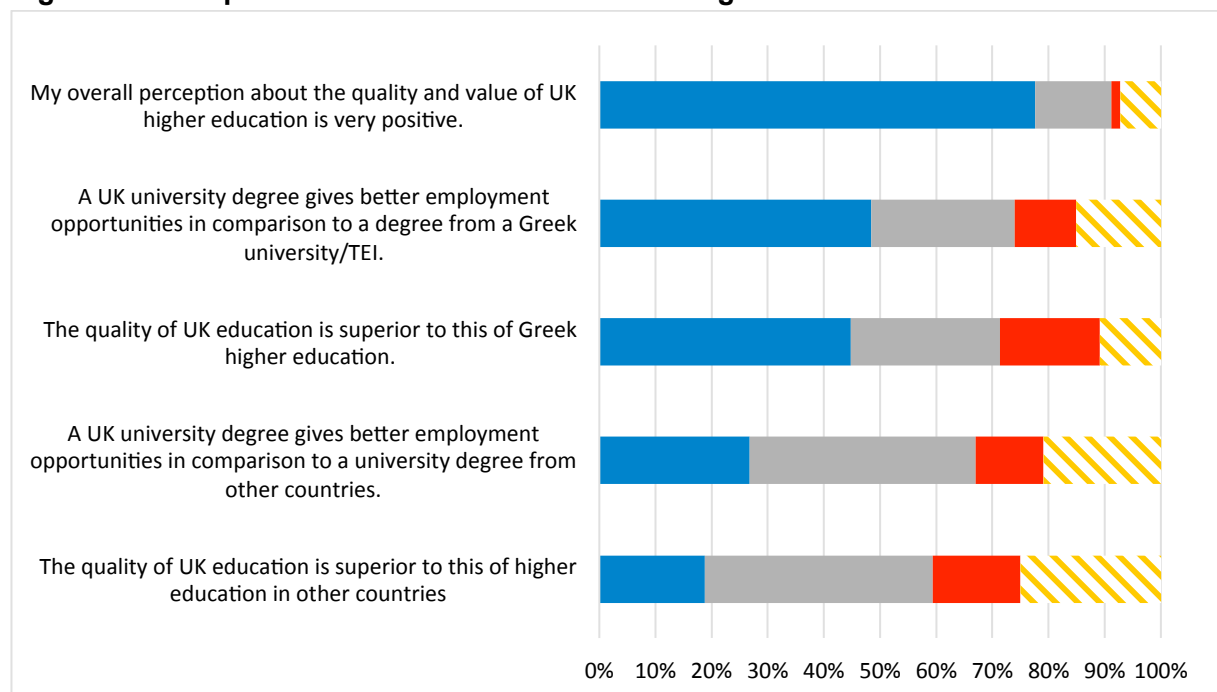
²⁵ In most instances, students appeared to be very satisfied with the quality of academic staff. There were a few instances, at specific colleges, where students raised some concerns about the quality of the academic staff.

As shown in Figure 27 below, the majority (78 per cent) of other students have a very positive perception about the quality of UK higher education. This coincides with the perception amongst UK TNE students (see Section 4.2), as well as the findings from previous research (QAA, 2016).

Other students appear to have an overall positive perception about the employment opportunities provided by a UK degree, in comparison to a degree from a Greek HEI.

At the same time, other students feel less positive about the quality and value of UK higher education compared to other countries. Specifically, the majority of other students are undecided as to whether UK higher education is of superior value and quality to other countries.

Figure 27: Perspectives of other students on UK higher education



Other students view the access UK TNE provides to the UK HE system at a lower cost as a key strength. They also see UK TNE as a bridge to further studies and employment opportunities. As summarised in Table 9 below, the key weaknesses of UK TNE for other students are around the comparability of student experience between TNE providers and those on the main campus. In addition, other students perceive TNE providers as keen to bend standards to meet student-as-customer expectations. Another consistent finding is the negative perception amongst other students about the recognition and value of TNE qualifications, especially regarding employment in the public sector.

From the findings, it is clear that other students have mixed perceptions about UK TNE in Greece. Positive perceptions are associated with TNE being a way to access

UK higher education and to benefit from the opportunities this creates. The key weaknesses relate to local providers and the restrictions of the policy environment. This shows how important the local context can be in realising the full potential of TNE.

Table 9: Key strengths and weaknesses of UK transnational education from the perspective of other students

Strengths	Weaknesses
<ul style="list-style-type: none"> • Access to UK higher education at a lower cost • Opportunity to adapt to UK higher education • Opportunity for better employment prospects post-graduation • Courses taught in English and possible connections with private companies or UK universities 	<ul style="list-style-type: none"> • Greek context and mentality • Lower quality • Not exactly the same learning experience as in the UK • Over relaxed policy according to rules and standards, because the parents of students are paying, in comparison with public universities where students must perform at a higher standard • Degrees are not recognised in the public sector

4.4 Student decision-making

According to previous research (Grant Thornton, 2016) the factors affecting a student's decision to choose a particular institution and to enrol on a specific course include 1) the quality of the programmes and the provider, 2) costs and fees, 3) social life, 4) entry requirements, 5) safety, 6) employment prospects, 7) the learning and teaching environment and 8) well-being.

However, the importance of each of these factors in the decision-making process of each student will be different and, most importantly, varies from country to country (Mazzarol & Soutar, 2002). In this context, UK TNE students and the other students were asked to rank in order of importance a list of predefined factors that led to them choosing their existing programme and institution.

Employability in the international market, quality of education and prospects for further studies abroad are the three most important factors for both UK TNE students and other students. For UK TNE students, the employability prospects in the international market is more important than the quality. UK TNE students rank 'the value of the UK degree in the Greek employment market' as the fifth most important factor, while other students rank this as the fourth most important, reflecting, to some extent, the indirect impact of the longstanding problems with the way TNE qualifications are perceived in the Greek employment market.

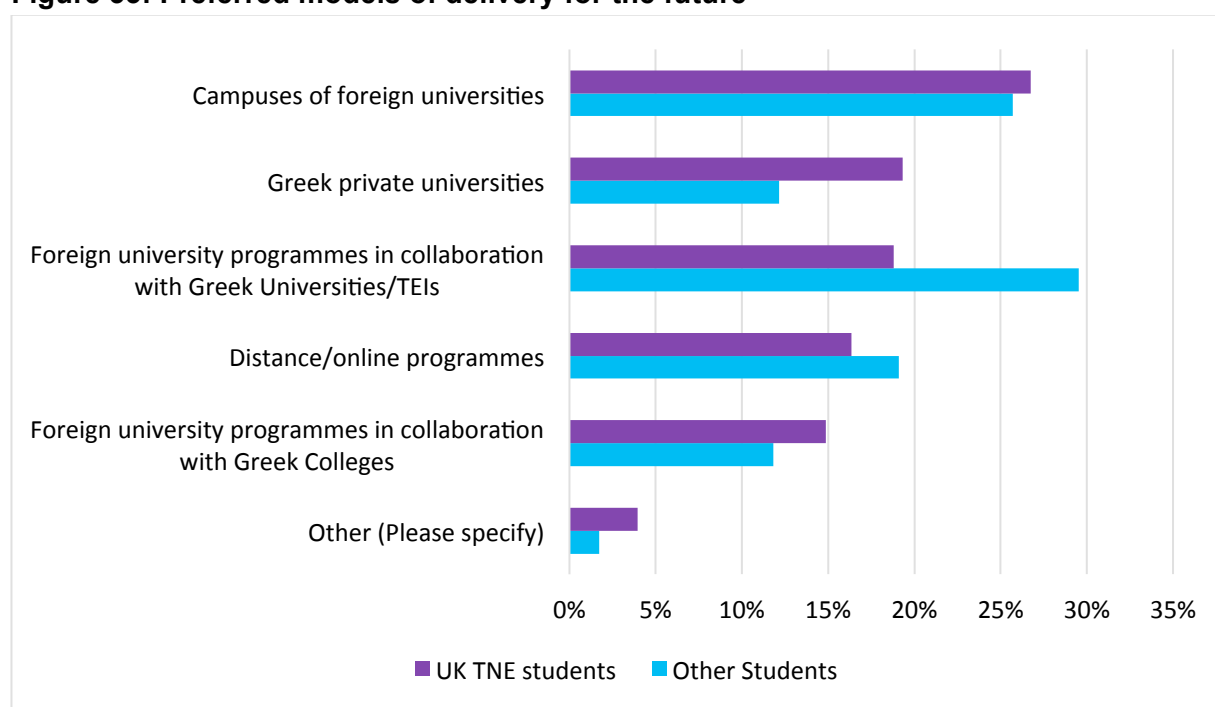
For UK TNE students, using English as the language of instruction is an important factor in the process of choosing a programme and institution. This might explain why several TNE providers in Greece have developed programmes that are delivered and assessed fully or partly in English. In contrast, other students rank the use of English as the language of instruction as sixth most important factor (see Table 10).

As previously mentioned, degree-awarding powers are only available to state HEIs in Greece. In recent years, there has been a public debate as to whether Greece should reform its constitution and allow the establishment of private HEIs (The PIENews, 2017). In this context, and given the objective of this report is to explore future TNE demand trends in Greece, the research examined the preferred modes of higher education delivery for students.

As summarised in Figure 33 below, 27 per cent of UK TNE students in Greece prefer branch campuses of foreign universities in Greece as the delivery model. Private universities (17 per cent), foreign university programmes in collaboration with colleges (17 per cent) and Greek HEIs (17 per cent) are the next most popular models.

For other students, there is a strong preference (30 per cent) for TNE collaboration between Greek HEIs and foreign universities.

Figure 33: Preferred models of delivery for the future²⁹



Further analysis of a sub-group (see Figure 34 below) within the ‘other students’ category reveals that **students in Greek HEIs** (blue), **Greek prospective students** (grey) and **Greeks who study abroad** (yellow) prefer to see 1) the development of TNE collaboration between Greek HEIs and foreign universities, 2) international branch campuses and 3) distance learning programmes.

²⁹ ‘Other’ in this figure refers to short-courses, executive programmes and study-abroad semesters in the UK.

5. An insight into the policy environment and a set of recommendations for strategic engagement with decision makers aimed at encouraging institutional collaboration with the UK

This section report provides an overview of the higher education, and more specifically TNE, policy environment. The discussion of the evidence seeks to enable useful observations that can contribute to the process of formulating appropriate recommendations to encourage institutional collaboration between Greece and the UK.

As a way of identifying the past, current and future course of the policy environment in Greece, the research included interviews with Mrs Diamantopoulou, ex-Minister of Education, and Mrs Nicky Kerameus, Shadow Minister of Education, New Democracy. This enabled an understanding of the policy environment trends by forming a longitudinal overview (past, present and future).

5.1 Current policies

Licensing

Only Greek HEIs and the licensed private colleges are free to engage in TNE activities in Greece. The licensing process is managed by the Greek Ministry of Education³² and is governed by the Law 4093/2012³³. Individuals or legal entities can establish private colleges, subject to them meeting specific requirements.

The application for a licence includes:

- 1) documents about the financial and legal status of the applicant
- 2) premises that are approved for education purposes (e.g. special approval is provided by the local authorities)
- 3) building fire safety certificate issued by the local fire authority
- 4) TNE agreements with a foreign university including a) an MoU, b) full programme specifications and a detailed analysis of each module, c) a detailed annual timetable and d) required equipment and learning resources by module
- 5) documentation about the legal status of the foreign university (e.g. whether it is recognised as an HEI in the home country)
- 6) application fee ranging from €2,150 to €2,500 depending on the size of the college premises.

The licensing process has been simplified over the past four years. In the first version of the law, there was the requirement for a performance bond of €500,000

³² Information about the licensing process and the documents required: <https://www.minedu.gov.gr/sxetika-me-ta-kollegia>

³³ https://www.minedu.gov.gr/publications/docs2013/n4093_2012.pdf

for every college outlet. At the time, this imposed significant barriers to entry for new colleges.

Quality assurance

TNE in Greece is not subject to an external quality audit by the host country quality assurance agency (in this case the Hellenic Quality Assurance Agency)³⁴. Instead, TNE providers are subject to quality assurance audits by the national quality assurance agency of the home country. For example, in the case of UK TNE programmes, this is the UK QAA. Additionally, TNE providers follow the internal quality assurance policies of the foreign university. Greek Colleges have been in favour of external quality audits and have taken initiatives to cover the existing gap in Greek policy. For example, the British Accreditation Council accredit all members of the Hellenic College Association³⁵.

Academic staff requirements

According to the existing legal framework, all academic staff who teach at private colleges should be registered on the 'register of private college teaching staff', which is maintained by the Ministry of Education. The requirements for registration are 1) a completed application form, 2) copies of academic qualifications and 3) an academic recognition certificate from Greek NARIC (D.O.A.T.A.P.) for any foreign academic qualifications. The latter imposes significant barriers to academics who have graduated from TNE programmes. From the personal interviews with managers of Greek Colleges it emerged that the existing legislation does not allow college graduates to progress and become academic staff at a college.

At the start of each academic year, colleges in Greece are obliged to inform the Ministry of Education about teaching staff allocations (e.g. module and staff involved). Also, during the academic year, colleges must update the Ministry of Education about any changes (e.g. addition of new staff).

Recognition³⁶

In Greece, TNE qualifications are recognised as having the same professional rights as the qualifications awarded in the home country of the awarding institution. This is

³⁴ <https://www.adip.gr/en/index.php>

³⁵ <http://www.the-bac.org/about/>

³⁶ An education bill was voted at the parliament in April 2019 which introduces a few changes however it's not clear yet to what extent they will affect the recognition procedures currently in effect.

based on the EU directive 2005/36/EC³⁷ on the recognition of professional qualifications.

There was a long period during which the Greek government resisted this directive in national legislation. This was based on the Greek government's perception that TNE is not a 'proper way' of delivering higher education (Kitsantonis, 2011; Georgiadis, 2011). It was only in 2010, and after a series of heavy fines by the EU and pressures by the Troika (IMF, 2011:p.141), that the Greek government took some steps towards the adoption of the EU directive³⁸.

The process³⁹ for the recognition of professional rights is managed by the Council of Recognition of Professional Rights (SAEP).

There are two types of professional recognition.

- 1) Recognition of professional rights for regulated professions (directive 2005/36/EC), which relates to certain regulated professions⁴⁰. The recognition of TNE qualifications relating to a regulated profession is subject to additional requirements (e.g. practical/working experience) set out by the regulatory professional body in Greece.
- 2) Recognition of professional rights for unregulated professions⁴¹. TNE qualifications, that relate to unregulated professions⁴² are recognised by SAEP as generic higher education qualifications (i.e. Bachelor degrees).

The recognition of professional rights applies to TNE qualifications that have been awarded by recognised foreign universities based in the EU, as well as countries in the wider European Economic Area (Iceland, Norway and Lichtenstein). Professional recognition is also possible for postgraduate programmes that are delivered by Greek colleges and accredited by international bodies (e.g. the Education Quality Improvement System and the Association of MBAs).

However, even after the integration of the EU directive, Greece has imposed significant obstacles to allowing full professional rights to TNE graduates.

³⁷ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32005L0036>

³⁸ The relevant national legislation for the recognition of TNE qualifications is a) the Presidential Order 38/2010, b) Law 4093/2012 and c) Law 4111/2013.

³⁹ Outline of the process and application documentation:

https://www.minedu.gov.gr/index.php?option=com_content&view=article&layout=edit&id=26691

⁴⁰ Within the EU regulatory environment, a profession is regulated if 'you have to hold a specific degree, sit special exams, or register with a professional body before you can practise it. The list of regulated professions varies by country'. There are 153 regulated professions in Greece. The full list can be found in this useful database: <http://ec.europa.eu/growth/tools-databases/regprof/index.cfm>

⁴¹ An unregulated profession is one that does not require a specific qualification, examination or professional body membership for someone to practice it.

⁴² According to the Hellenic Colleges Association, some examples of unregulated professions are in the subject areas of business administration, marketing, computing and shipping.

Firstly, there have been significant delays in the process of recognition. In March 2018, there were more than 3,000 applications⁴³ pending recognition from SAEP, and the process has been anything but efficient.

Secondly, the recognition does not consider the classification of the TNE qualification. Instead, all TNE graduates are considered as having graduated with a pass (five out of ten in the Greek higher education system grading scale). For example, a TNE graduate with a first-class Bachelor degree is recognised as having graduated with third class degree. This amounts to direct discrimination against TNE graduates and consequently impacts their employability prospects.

Academic recognition

TNE qualifications are not recognised as academic qualifications in Greece. Graduates of TNE programmes are not allowed to seek academic recognition through the Greek NARIC (D.O.A.T.A.P.). According to D.O.A.T.A.P., TNE qualifications are not eligible for academic recognition as foreign higher education qualifications because the studies have been completed in Greece. According to the D.O.A.T.A.P. legal framework (3328/2005⁴⁴), for a foreign higher education qualification to be eligible for academic recognition in Greece, the studies should have been completed in the country of the awarding institution.

Lack of academic recognition for TNE graduates means they are not able to continue their studies in Greek HEIs or HEIs in other countries, for example Cyprus, where D.O.A.T.A.P. recognition is required.

Historically, in Greece, the academic recognition of qualifications has been linked to professional rights. The norm, even today, is for private and public organisations to require an academic recognition certificate from D.O.A.T.A.P. for any foreign qualification. This is particularly evident in the public sector and professional bodies, such as the Economic Chamber of Greece.

The delay in the full and effective adoption of the EU legislation imposes significant barriers to the employability of TNE graduates. As previously discussed, this has created and continues to sustain a perception within Greek society that TNE is an inferior form of higher education provision. Clearly the recognition of TNE qualifications in Greece is an issue of critical importance for students, families, local providers and foreign HEIs.

⁴³ <http://www.vimaonline.gr/20/article/31630/ptuhiouhoi-kollegion-omiroi-tou-saep-pano-apo-3000-oi-aitiseis-anagnorisis-se-tragiki-kathusterisi-> (in Greek)

⁴⁴ <http://www.doatap.gr/gr/nomos.php> (in Greek)

5.2 Reflections and recommendations by a Greek ex-Minister of Education

Ms Diamantopoulou was Minister of Education between 2009 and 2012, and in 2011⁴⁵ she introduced a major legislative reform to the Greek higher education system that was supported by more than two-thirds of the Greek parliament. Her initiatives included the regulation of the TNE market, and particularly creating a framework for the licensing of TNE providers in Greece. Because of her progressive policy agenda and determination to introduce reforms, Ms Diamantopoulou is widely perceived as one of most impactful and successful Ministers of Education in recent years.

Internationalisation of Greek higher education institutions

Ms Diamantopoulou mentioned that one of the key obstacles in the effort to internationalise Greek higher education is the introversion of Greek HEIs. She believes the potential for TNE collaboration between Greek HEIs and UK HEIs is undermined by the existing governance model within Greek HEIs. For her, unless the existing governance model is changed, and Greek HEIs become more extrovert in pursuing international collaborations, there are no positive prospects for substantial internationalisation activity.

Historically, the governance of Greek higher education institutions was concentrated around the Minister of Education. In this rigid governance model, the Minister of Education was responsible for most decisions concerning the operation of Greek HEIs. Ms Diamantopoulou highlighted a key priority of her reforms as the delegation of authority from the Minister back to the HEIs, thus aiming to allow for more autonomy amongst the management councils within each HEI. Most of her reforms were fully abolished by new legislation introduced by subsequent governments.

Ms Diamantopoulou mentioned that when she was a Minister, there was a target to reduce the number of available places in Greek HEIs by four per cent each year. This led to a reduction of 13 per cent over a period of three years. This was important as an effort to bring back some balance between the number of available places for new students and the available resources in Greek HEIs. The availability of resources is key, not only in improving the student experience, but also in allowing Greek HEIs to develop and pursue an internationalisation strategy.

Another issue that, according to Ms Diamantopoulou, undermines the internationalisation of Greek HEIs is the constitutional restriction for the establishment of private universities. This does not allow new institutions to enter the

⁴⁵ This is known as '*nomos Diamantopoulou*' and refers to Law 4009/2011 <http://www.eng.auth.gr/enopoiimeno-keimeno-toy-n4009-2011-me-tis-tropopoiiseis-toy-n4076-2012.html>

market and act as examples of good practice. Ms Diamantopoulou believes that private universities could help public HEIs unleash their potential to internationalise and allow them to focus on further improving their strong research output record.

Ms Diamantopoulou explained that, historically, the UK has been a major destination for Greek students because of the language, the range of options available to students and the coordinated efforts to promote and support the UK higher education by the UK government. When it comes to language of instruction, Ms Diamantopoulou mentioned that it is critical to accelerate the development of undergraduate and postgraduate programmes in English. This will create multiple benefits for Greek HEIs, academics, students and the wider higher education sector.

On the internationalisation of Greek higher education with the aim of attracting international students, Ms Diamantopoulou mentioned that under the existing governance model, it is almost impossible for Greek HEIs to achieve this. Instead, she recommends that it is vital for Greek HEIs to gain their autonomy and develop programmes suited for the international market. This includes programmes in English and, primarily, with 'fit for purpose' admission criteria that will allow international students to complete their enrolment on time⁴⁶.

Greek colleges and transnational education

When it comes to TNE provision by Greek colleges, Mrs Diamantopoulou mentioned that, when she became Minister of education, the TNE sector in Greece was unregulated. For example, there were issues with the facilities and academic staff in some of the private colleges. As a result, there was an effort to liaise with the UK government and put in place a mechanism for the regulation of UK TNE in Greece. Mrs Diamantopoulou mentions that this was not successful mainly because in the UK, TNE is the responsibility of the individual universities and the QAA.

According to Mrs Diamantopoulou, for the UK to achieve more sustainable development of its TNE around the world, it is important to develop additional quality assurance mechanisms. Specifically, Mrs Diamantopoulou recommends the creation of a department within the QAA that liaises with the relevant authorities in each TNE host country (i.e. the Ministry, the National Quality Assurance Agency) to conduct due diligence and verify the specifics of each collaboration. This will reassure the authorities in the TNE host country that the collaboration meets a set of minimum standards around premises and the quality of academic staff.

⁴⁶ For example, the existing admission criteria for international students includes the requirement for all foreign qualifications to have academic recognition from D.O.A.T.A.P. (the Greek NARIC). The process of academic recognition usually takes several months, if not years, to complete. Therefore, the existing admission requirements are not fit for purpose for international student recruitment.

5.3 Insights from the Greek Shadow Minister of Education

Mrs Nicky Kerameus is Head of the Education, Research and Religious Affairs sector of the New Democracy Party. She contributed her thoughts, as well as New Democracy's views on 1) the internationalisation of Greek higher education and 2) TNE with a specific focus on collaboration involving Greek HEIs.

Internationalisation of Greek higher education institutions

For New Democracy, internationalisation is central to improving standards across the Greek higher education sector. Thus, Greek HEIs should prioritise internationalisation both at home and abroad. Internationalisation of Greek HEIs should include the development of undergraduate and postgraduate programmes in English.

The longer-term objective of New Democracy is, through the internationalisation of Greek HEIs and, later, with the creation of non-public HEIs, to transform Greece into an international education hub.

Mrs Kerameus expressed very positive views about the prospects of TNE collaboration between Greek and UK HEIs. Specifically, she mentioned that Greek HEIs could leverage joint and double degree arrangements and develop summer schools as a way to improve their international visibility and attract international students.

Non-public higher education institutions

When it comes to establishing non-public HEIs, Mrs Kerameus mentioned that this is an unquestionable need that will bring benefits to Greek society, the economy and the higher education system. For example, non-public HEIs could become a driver for quality improvements across the higher education sector. New Democracy also considers non-public HEIs as catalysts for reinforcing the need for stronger links between higher education and industry. However, Mrs Kerameus acknowledges that the necessary constitutional amendment (to Article 16) will take a considerable amount of time (e.g. two government periods) and an extended parliamentary majority (support from 200 of 300 Members of Parliament).

Greek colleges and transnational education

On existing UK TNE arrangements in Greece, Mrs Kerameus expressed an overall positive perception. However, she mentioned that there is a great degree of variability in the nature and quality of existing partnerships and, primarily, amongst local TNE partners. In this context, New Democracy is in favour of more comprehensive and rigorous quality assurance mechanisms for TNE in Greece.

On the issue of recognising TNE qualifications, Mrs Kerameus, a prominent lawyer by profession, acknowledged the negative impact of the existing legislation on all key stakeholders (students, families, colleges and employees in colleges). New Democracy is in favour of more comprehensive recognition of TNE qualifications that is closely aligned to recognising degrees attained by studying at the main campus of a foreign university. However, there needs to be comprehensive scrutiny of each TNE qualification and any recognition should not be an outcome of an automatic process. Instead, as is the case of degree attained at foreign universities, there needs to be consideration of the variability of quality (in terms of degree classification, local partner and foreign HEI).

Future policy agenda

Mrs Kerameus outlined the policy priorities for New Democracy, which include:

- working towards the reinforcement and autonomy of universities
- strengthening the link between education and training, research and the market (bridging the gap)
- employing alternative sources of university funding to complement public funding
- improving the quality and security of the academic environment
- working towards the establishment of private universities and the internationalisation of education.

Mrs Kerameus emphasised that the internationalisation of education, and in the field of higher education in particular, it is a top priority for the New Democracy party, taking into consideration the fact that there is currently a talent shortage in the market and a need to equip young people with the right skills.

She also briefly explained what is meant by the internationalisation of education.

- Introducing foreign language programmes (at both graduate and postgraduate levels, without the limitations currently imposed by Greek legislation).
- Introducing summer courses.
- Having more distance learning programmes, programmes of collaboration and mobility programmes.
- Allowing the creation of private universities, which, of course, requires a prior constitutional amendment.

She concluded by underlining that investment in education goes beyond economic necessity, and that it is a priority for the New Democracy party.

5.4 Overall reflections and recommendations on the policy environment

The evidence from the key stakeholders suggests that the key issue in the TNE market in Greece is a complex and inefficient policy environment relating to the recognition of TNE qualifications. Linked to this, there is a wider perception within Greek society that TNE is inferior as a form of higher education provision in comparison to public HEIs.

In addition, and linked to the issue of recognition, is the exclusion of TNE from Greece's formal education system. The formal education system dictates the recognition of qualifications and the overall standing of education providers in Greece. Indicative of this exclusion is that Greek Colleges, as TNE providers, are not mentioned anywhere on the website⁴⁷ of the Greek Ministry of Education.

Recommendation: seek to resolve the issue of recognition within the existing constitutional framework

Resolving the issue of recognition of TNE qualifications will generate multiple benefits for existing and future UK TNE arrangements in Greece. As such, it is of critical importance for all major stakeholders to align their efforts in reinforcing the need to modify the existing legislation. The UK NARIC, UUKi and British Council all have a key role to play. There might be scope to explore the available option for legal reform within the existing constitution. For example, there may be the opportunity for amendments in the D.O.A.T.A.P. legislative framework⁴⁸ regarding the definition of degrees that are accepted for academic recognition. The existing definition is not fit for purpose, even in relation to the wide range of delivery models of higher education abroad. For example, students today tend to complete parts of their programme in different institutions, countries and through different methods. As such, D.O.A.T.A.P. will benefit from adopting a more modern definition of foreign qualifications that accounts for academic recognition.

From the evidence presented, it is clear that if the issue of recognition is resolved, it will lead to significant improvements in the perceptions within Greek society about the value of TNE. Consequently, this will then lead to very positive prospects for demand and growth.

⁴⁷ <https://www.minedu.gov.gr/>

⁴⁸ <http://www.doatap.gr/gr/nomos.php>

Recommendation: transnational education partners in Greece to adopt a systematic external quality assurance process

In the absence of a national quality assurance process for TNE programmes in Greece, local TNE providers could seek to formalise a system of external quality assurance. This will lead to improvements in the way TNE is perceived by prospective students, families, policy makers and, most importantly, Greek HEIs. A transparent system of quality assurance, where sector (e.g. local TNE providers) findings are publicly available, will introduce the appropriate degree of accountability to help the TNE sector improve its standing within the Greek higher education sector.

Recommendation: Universities UK International, British Council and Higher Education Academy alliance

A key issue emerging from this research relates to consistency in the quality of academic staff within local TNE providers. This is often used by policy makers and regulators as an argument against the growth of the TNE market.

In the UK, all academic staff with teaching duties are required to acquire fellowship of the HEA⁴⁹. The HEA has created a global programme through which it promotes its fellowship routes to foreign markets. Considering the scale of UK TNE, one would expect to see fast growth within the HEA fellowship in the major UK TNE host markets.

There is an opportunity for the British Council and UUKi to create an alliance with the HEA in order to promote and facilitate the HEA fellowship scheme in Greece. This would be a way of standardising the quality of academic staff in local TNE providers. This model could be used as a flagship to indicate the commitment of the UK higher education sector to engage in high quality TNE activities.

The involvement of the British Council in Greece could be 1) in promoting and facilitating the HEA fellowship (e.g. application workshops, development of a community of existing fellows to provide reference to new applicants) and/or 2) in delivering HEA-accredited programmes that will lead to HEA fellowships.

⁴⁹ In March 2018, the Higher Education Academy (HEA) merged with the Leadership Foundation for Higher Education (LFHE) and the Equality Challenge Unit to form [Advance HE](#).

The research sought to further explore the underlying issues that cause some students to have negative expectations about Brexit. The students with negative expectations indicate that the main areas of concern are:

- 1) higher fees for EU students who want to study in the UK
- 2) uncertainty about the post-Brexit cost of living and visas for EU students
- 3) problems in the recognition of UK qualifications (this was the most frequently quoted issue for UK TNE students)
- 4) the overall impact on UK HEIs that could make them less connected to the European Union and less international.

Table 11 and Table 12 give examples on how UK TNE students and other students expect Brexit to impact them negatively.

Table 11: Examples of how UK transnational education students in Greece think Brexit will impact them

Quote	Theme
<ul style="list-style-type: none"> • The tuition fees may get more expensive; we won't be able to obtain the student visa that easily in case we want to study in the UK or continue our studies there 	Higher fees and Visa issues for EU students
<ul style="list-style-type: none"> • The collaboration between UK and Greece might become more difficult leading to problems with the course I am in 	Problems for TNE collaboration
<ul style="list-style-type: none"> • I am not sure whether my degree will be comparable to the degrees from other EU countries • I am interested in continuing my studies at postgraduate level in the UK, and as such, I believe that Brexit will impact everyone who is considering to study in the UK; the problems concentrate around the recognition of qualifications and the instability of the prices of goods and services 	Recognition of UK TNE qualifications

Table 12: Examples of how other students think Brexit will impact UK higher education

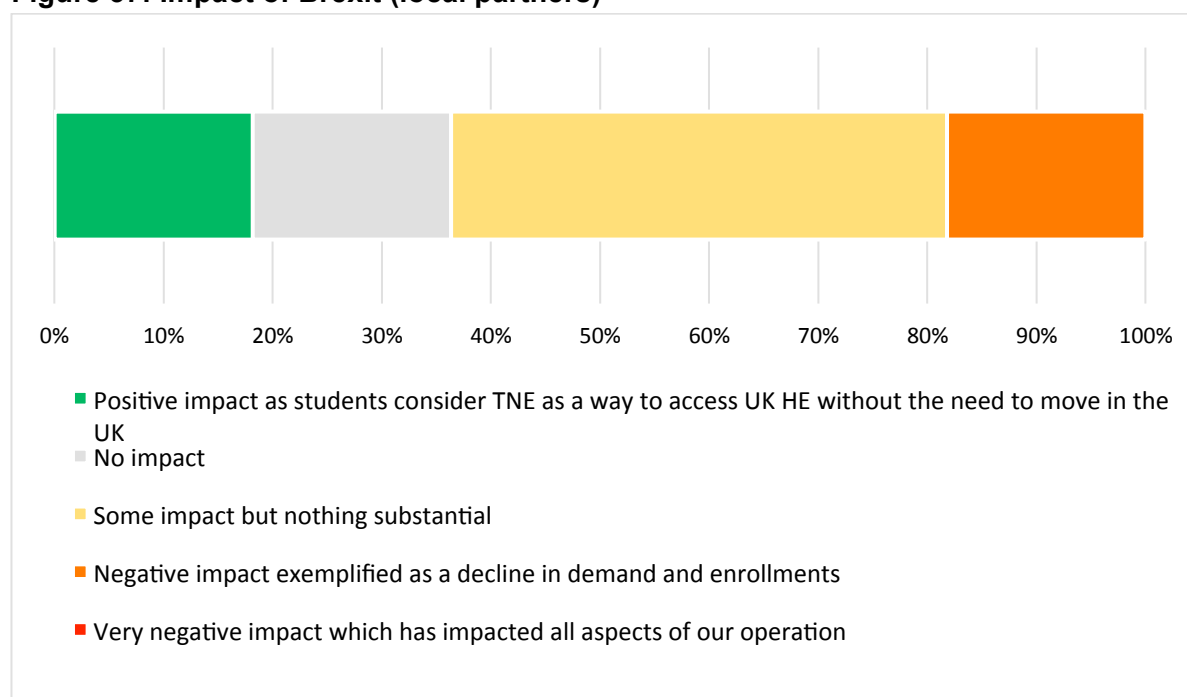
Quote	Theme
<ul style="list-style-type: none"> If Brexit happens, less Greek students will be able to access the universities, because visa will be needed, and the tuition fees will be higher; so, year by year, the rate of international students will fall EU students will be no longer considered as equal to UK/home students and therefore it will be harder for them to pursue a degree in the UK due to the living costs, and tuition fees 	Higher fees and Visa issues for EU students
<ul style="list-style-type: none"> It will create problems in the recognition of UK HE qualifications 	Problems with the recognition of UK HE qualifications
<ul style="list-style-type: none"> There will be an overall trend that will make UK HE more inward-looking and less international 	Recoil of internationalisation
<ul style="list-style-type: none"> Collaborations between UK and EU universities in a European framework will be limited, or even cease to exist; UK universities will be excluded from European exchange programmes, such as Erasmus 	No access to EU programmes and funding

6.2 Local partners

In terms of Brexit, the majority (64 per cent) of local partners reported no impact on demand and enrolments for UK TNE programmes in Greece. Only 19 per cent of local partners reported a high negative impact of Brexit, which is exemplified as a decline in demand and enrolment on UK TNE programmes in Greece. At the same time, two in ten local partners see the prospect of Brexit having a positive impact on UK TNE programmes in Greece (see Figure 37). They assume that Brexit will lead to an increase in the demand for UK TNE programmes offered in Greece.

Although most local partners did not report any major impact in relation to TNE, the majority did raise concerns about the emerging uncertainty Brexit is causing, which could potentially alter the future course of TNE partnerships across the world.

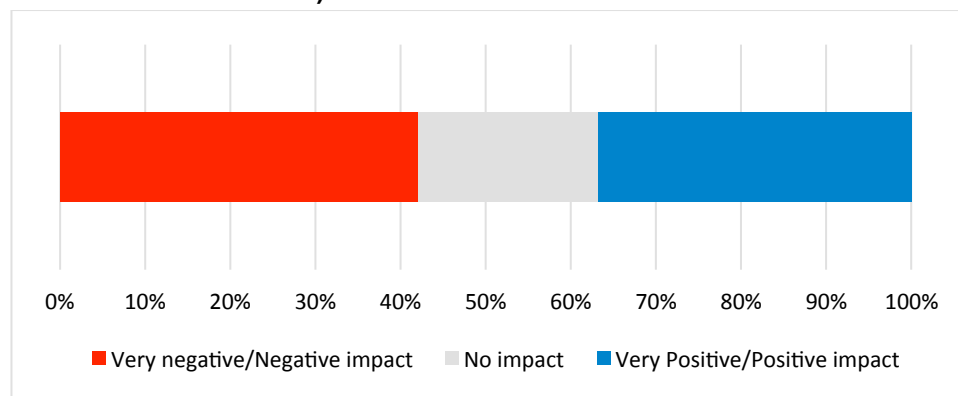
Figure 37: Impact of Brexit (local partners)



6.3 UK higher education institutions

UK HEIs have mixed views about the impact of Brexit on their TNE arrangements. Around 42 per cent of respondents believe that Brexit will have a negative impact on their TNE arrangements. At the same time, 38 per cent feel that Brexit will have a positive impact (see Figure 38). This view is based on expectations that TNE will substitute EU student mobility because of the higher fees or stricter visa policies.

Figure 38: Impact of Brexit on transnational education arrangements (UK higher education institutions)



When it comes to institutional responses towards Brexit, respondents from UK HEIs indicate a mix of different approaches.

The following five approaches emerge from the qualitative data as UK HEIs' response to Brexit:

- 1) a comprehensive internationalisation strategy
- 2) a strategy aiming to create deeper and wider collaboration with EU HEIs
- 3) a student recruitment strategy particularly suited to EU students
- 4) a 'wait and see' approach
- 5) an approach that sees Brexit as a no issue.

Some HEIs appear to have plans for a comprehensive internationalisation strategy that includes TNE and other collaborative strategies in Europe and beyond (e.g. to deepen links with EU and non-EU HEIs). Other UK HEIs plan to concentrate on deepening links with EU HEIs, by, expanding their existing collaboration activities and creating an EU base. Developing a student recruitment strategy targeted to EU students is another popular approach for UK HEIs. At the same time, other UK HEIs have no clear institutional approach towards Brexit. For example, some institutions are adopting a 'wait and see' approach, while others don't view Brexit as a potential threat.

Table 13 contains respondent quotes exemplifying these five approaches.

Table 13: Examples of UK institutional responses to Brexit⁵⁰

Quote	Theme
<ul style="list-style-type: none"> • We have an ambitious growth plan in place that includes both EU and non-EU partnership development for TNE and student mobility • More articulation/progression partnerships and moving west to where there is likely to be more family funding, less loan dependence • Looking at more franchise arrangements; recruitment from outside EU is taking higher priority • Seek new opportunities in Europe and beyond • Looking for more partners in EU and non-EU countries 	Comprehensive internationalisation strategy
<ul style="list-style-type: none"> • Proactively seeking new and deeper links with EU HEIs • In general, stronger partnerships with EU universities to maintain the connections (research and student recruitment) • Partnerships with HEIs in the EU • With respect to Greece, to continue with current arrangements in the hope they may be useful post-Brexit • An EU strategy is currently being formulated; we are engaging much more with European HEIs than ever before, and in a more formal way • Have a base in Europe 	Deeper and wider collaboration with EU HEIs
<ul style="list-style-type: none"> • Shifting EU student recruitment to a more international setting (rather than being alongside home recruitment) 	EU student recruitment strategy
<ul style="list-style-type: none"> • Largely keeping a watching brief at this point in time; scenario planning has been undertaken and discussed with all faculty PVCs and Heads of School, looking at impact on student numbers, and how any drops in EU numbers might be mitigated for 	Wait and see approach
<ul style="list-style-type: none"> • We are not taking action; not seen as a major threat 	Brexit as no issue
<ul style="list-style-type: none"> • At the moment there is no clear strategy to mitigate the impact of Brexit • Don't know, senior management still vague • The university has not adopted a formal position on this 	Unclear approach

⁵⁰ What is your institution's intended response to Brexit (e.g. in terms of hedging against the risk for a potential decline in EU student recruitment and research income)?

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