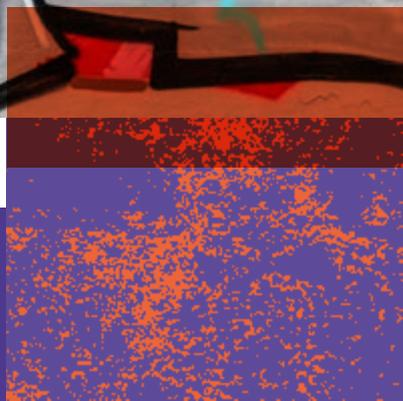
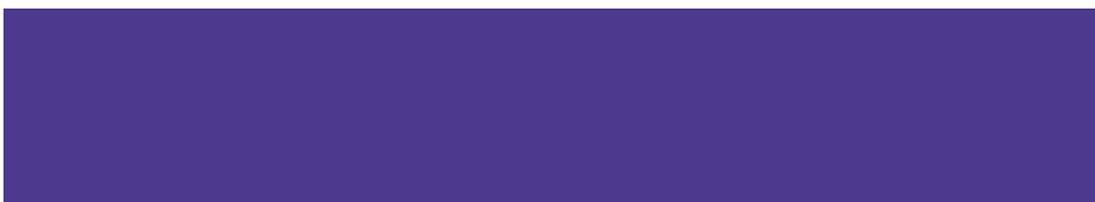
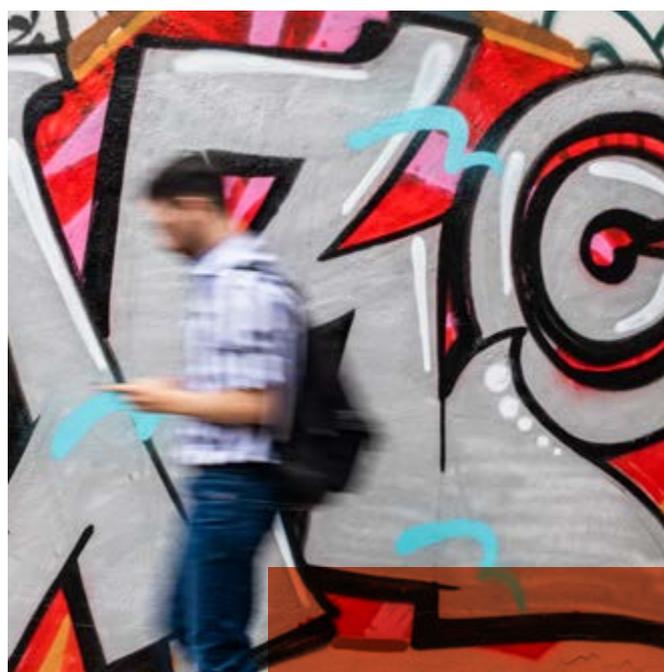


# UK Transnational Education in the EU: Models, Insights and Strategic Choices



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# Executive summary

## The case studies

In spite of the growth in transnational education (TNE) in the EU, levels of understanding of the technical operational arrangements are still comparatively low. The 15 case studies in this report, developed between March and May 2025, explore financial and legal considerations, partnership selection and management, and student outcomes. The case studies illustrate a range of delivery models, including validation, franchising, dual degrees, distance/online learning and international branch and multi-campus. They vary in size from delivering a single postgraduate course to delivering over 70 undergraduate and postgraduate courses. Student numbers range from 40 to 5,000.

## The context

The context for TNE is a very significant factor in shaping operational arrangements. Ultimately, it may determine success or failure. In the EU region, the context is one of continuing growth in which the UK higher education (HE) sector is currently the leading TNE player. The HESA AOR data (2023/24)<sup>1</sup> show UK TNE enrolments grew 15 per cent in 2023/24, representing much faster growth than East Asia, albeit from a lower base. The region has potential for huge growth, attracting both local and international students.

The context, however, is changing fast. Initially, the UK's withdrawal from the EU raised concerns for the continuance of UK provision. The case studies, however, suggest that UK university operations are finding ways of navigating this. While regulatory and recognition barriers continue to present challenges in some countries, regulatory changes underway in Greece and Cyprus have potential to present major opportunities.

The entry of new players poses a significant threat to the UK's position in EU TNE. Edtechs and other big commercial companies are creating an increasingly competitive environment, matched by downward pressure on pricing. There is evidence of the rapid development of new multifaceted models able to capture advantage in dynamic, often volatile, education markets. This is against the backdrop of significant financial pressures in UK universities.

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<sup>1</sup> The HESA Aggregate Offshore Record is collected in respect of students studying (to date) wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider. The Aggregate Offshore Record is collected as a headcount, rather than a collection of individualised data. Information is collected on the location, provision and numbers of students. <https://www.hesa.ac.uk/collection/c23052/introduction>

## Eight lessons from UK universities

In developing the case studies, universities identify key lessons to share with the UK sector. These are:

1. Strategic alignment and objectives – Higher education institutions (HEIs) must have clarity on mutual objectives, defining what each partner wants to achieve, ensuring values and goals align and that partnerships are mutually beneficial and supportive. Identifying the right partner is essential, and this involves being realistic about what you actually need to deliver a successful TNE operation.
2. A high-quality student experience, with a focus on employability,<sup>2</sup> is a key decision-making factor for the majority of TNE students. Universities should take account of this in course design, delivery and student experience. Systems to measure student experience and track graduate outcomes are important
3. Financial sustainability and operational efficiency – success depends on building a robust business model, balancing investment and return. Major operational costs are staffing and accommodation, but less obvious costs are teaching in the local language, providing student services and library licences for publications access. Clear division of financial responsibilities and accountabilities between the partners is vitally important.
4. Legal and regulatory requirements determine not only what provision is possible but also the operational arrangements needed to overcome barriers or seize opportunities. Labour laws are important – they set the terms and conditions of staff employment.
5. Partnership management and communication – as well as contractual agreements, there must be clear management structures, defined roles and regular, transparent communication between partners at strategic and operational levels.
6. Quality assurance and academic standards – there must be regular quality monitoring processes, due diligence in academic mapping, moderation of assessments and consistent application of standards across multiple delivery sites.
7. Cultural sensitivity and local relevance – adapting programmes for relevance to local contexts and cultures requires HEIs to ensure that staff understand country context and culture. Awareness of different academic cultures is also important.
8. Sustainability and innovation – regular re-assessment of the sustainability of TNE operations is essential. This means exiting markets for some institutions; for others, it means seeking new (often commercial) partners or adopting innovative approaches to operations and delivery methods.

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<sup>2</sup> See previous British Council study *Local impact of transnational education A pilot study in selected European Union countries*, British Council 2021.

## The future of UK TNE in the EU region

The evolution of TNE in Europe is not linear; various models co-exist, adapting to specific market niches, institutional strategies and the unique context of each of the countries. The boundaries between models are blurring, leading to more complex, multidimensional partnerships. TNE models thriving in this environment include those that incorporate research as well as teaching; operational extension from a single country base to regional operation while retaining local relevance; innovation in delivery to meet student and employer needs – catering to professional students in ‘niche’ subjects not offered by local public universities; digital/online delivery; flexible programmes, with increasing focus on postgraduate continuing professional development as well as undergraduate programmes; and attracting international students. The following recommendations highlight ways in which UK TNE could be better supported in the EU region.

The key lesson is that the regulatory context is pivotal; it acts not just as a gatekeeper but as a fundamental shaper of the TNE landscape, influencing its character, integration and capacity to contribute effectively to both national HE goals and international collaboration

## Recommendations for higher education institutions

- HEIs should seek partners who align with their values and goals and where there is shared mutual benefit. There should be clarity about what each partner requires and what each brings to the TNE operation.
- Getting the finances right is critical. Ongoing financial monitoring is essential to accommodate the speed of change in the TNE environment.
- There is a need to build rigorous business models in which quality and academic standards are paramount. These must be underpinned by institutional structures to manage delivery.
- Partnerships must be proactively managed, for example through joint management processes. Effective communication is essential, and institutions should prioritise and invest adequate staff resources for this.
- HEIs must have a clear understanding of the context in which TNE will be delivered, including an in-depth understanding of countries’ legal and regulatory frameworks.
- HEIs should ensure that their market intelligence includes an understanding of student demand and expectations, particularly around employability, in the country of delivery. They should consider if and how provision can be adapted to local market conditions. They should also have mechanisms to track alumni and graduate outcomes.
- Innovative models of TNE programme delivery are growing rapidly. Institutions must keep abreast of new developments and be agile in adapting and growing their programmes.

## Recommendations for policymakers and regulators

- The UK's international education strategy should recognise the growing nature of TNE in Europe. The strategy should be underpinned by evidence-based analysis of European student markets, opportunities and challenges for UK HEIs.
- The EU region should be a strategic priority for the UK government because of the size of the TNE market, the growth trajectory and the UK's current position there, and significant opportunities to partner with long-established, high-quality academic institutions throughout the region.
- In policy exchanges with EU counterparts, government departments should focus on mutual benefit. This will unlock many more opportunities for UK TNE than a focus on financial benefit for the UK.
- There should be greater integration with European initiatives. Government departments should consider how the European Union's Research and Innovation Framework Programme 10 and the Youth Experience Scheme could strengthen UK TNE.
- The Office for Students (OfS) and the Quality Assurance Agency for Higher Education (QAA) should continue to engage with EU stakeholders to promote the rigour of UK quality assurance (QA), and the OfS should help to move the dial on compliance with The Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) principles.

## The British Council should

- continue to provide partner-finding activities and services for UK universities seeking EU partners
  - provide UK HEIs with market intelligence on 'niche' in-demand professional areas with limited local supply
  - identify areas where UK universities can partner with local private institutions to support continuing professional development and specialist undergraduate and postgraduate programmes
  - assist in finding partners in the private sector for UK HEIs
  - provide UK HEIs with access to information on local scholarships or funding for students
  - consider opportunities to promote UK TNE provision in Europe to international students. This would need additional resources and should be underpinned by analysis of available data on international student mobility to the major TNE countries in the EU (Germany, France, Italy, Ireland, Spain, Greece and Cyprus –see further research recommendations).
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# Introduction

## Aims and methodology

In spite of the growth in TNE in the EU, levels of understanding of the technical, operational arrangements are still comparatively low. The research provides an analysis of a select range of representative models of TNE and uses case studies from different EU countries to map detailed arrangements relating to these models.

The research took place between March and May 2025 and was revised to include the latest HESA AOR data in September 2025. We used qualitative and quantitative data collection, integrating primary data (interviews) and secondary data (academic literature, quantitative trends, policy documents) to comprehensively evaluate TNE models in the EU, particularly in the period following the UK's departure from the EU in 2020. Desk research was undertaken to identify a consolidated overview of models and to map trends in TNE in the EU by model.

Fifteen case studies have been produced, focusing primarily on Germany, Greece and Cyprus. Ireland, France and several other countries were also included. Case studies of online learning providers extend beyond Europe to countries worldwide. The case studies illustrate a range of delivery models, including validation, franchising, dual degrees, distance/online learning, and international branch and multi-campus. They vary in size from delivering a single postgraduate course to delivering over 70 undergraduate and postgraduate courses. Student numbers range from 40 to 5,000.

Semi-structured stakeholder interviews were conducted with HE policy makers in Germany, Greece and Cyprus.

## Note on data

Our analysis is based on the HESA AOR data for all EU countries between 2019/20 and 2023/24,<sup>3</sup> to compare the year before COVID-19 and the UK's withdrawal from the EU with the most recent data. After discussion with one of the case studies, we have excluded 'withdrawn' students in order to present a more accurate picture of trends.

The HESA AOR 'type of activity' categories include distance and online learning and branch campuses. Apart from validation, other forms of collaborative provision are not clearly differentiated in the data. We therefore group validation, franchise and joint/dual degrees together in this report, under the title 'collaborative provision', using the following definition:



'collaborative provision' denotes provision leading to an award of an awarding provider delivered and/or supported and/or assessed through an arrangement with a partner organisation. This includes franchise, validation and joint/dual awards.

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3 <https://www.hesa.ac.uk/collection/c23052/introduction>

# 1 The transnational education landscape in Europe

## The context

The transnational education (TNE) landscape is a significant factor in shaping the way in which TNE operations are managed in EU countries. UK TNE is expanding rapidly across the EU, with overall enrolment growing by 37 per cent between 2019 and 2023. This represents a faster growth rate than in other world regions, increasing the EU's share of global UK TNE enrolments from 11 per cent in 2019/20 to 15 per cent in 2023/24.

Models are changing. Financial pressures on UK universities and changes in regulations and recognition are leading to new relationships and models. The case studies indicate that the UK's withdrawal from the EU is a continuing challenge, but HEIs have adapted five years on and new models are emerging. The overriding challenge in 2025 is the financial plight of UK universities and the fact that business models operating before 2020 were operating at a loss that can no longer be afforded. Although some branch campuses have shut as a result of these pressures, new ones are opening, particularly those operated by private universities. New opportunities presented by demand across the EU for innovation in delivery to meet student and employer needs is driving growth in UK TNE student numbers across the EU, primarily through collaborative provision models. UK universities are actively engaged in catering to professional students in niche subjects not offered by local public universities; digital/online delivery; flexible programmes; increasing focus on postgraduate professional development programmes as well as specialist undergraduate programmes; and attracting international students. We are also seeing operational extension from a single country base to regional operation.

Collaborative provision has been the driver of this growth. Distance and online provision is growing, albeit at a much slower rate. The picture for branch campuses is mixed – the HESA AOR shows 11 branch campuses in EU countries with students in 2023, with four of these now closed and in 'teach out'. However, these four were relatively small operations that were established before 2020 and were unable to remain financially sustainable following the UK's exit from the EU. There are also three private universities that have established new operations in Germany, recording students for the first time in in 2023. Recent legislation in Greece allowing the legal establishment of branch campuses, and similar legislation in Cyprus, is discussed later in this report.

Our analysis focuses on growth compared to 2019, the year before both COVID-19 and the UK's withdrawal from the EU could have had any effect on numbers, and broadly concludes that the effect has been to focus UK HEIs on the financial sustainability of pre-existing TNE models, alongside a rapid development of new multifaceted models that has led to overall growth. While some branch campuses have failed, a small number have adapted and thrived and there has been a significant growth in collaborative provision.

## TNE models in EU country markets

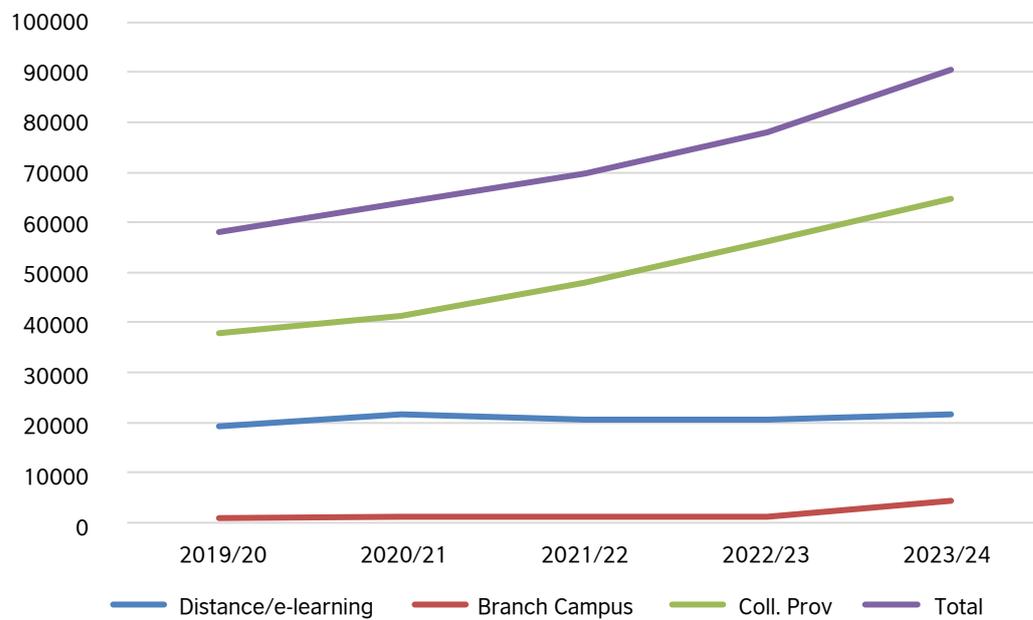
The report uses the TNE models defined in the British Council / German Academic Exchange Service (DAAD) report Transnational Education: A Classification Framework,<sup>4</sup> adapting these to the European countries studied (see Appendix 1). Currently three broad types of TNE models operate in Europe. Examples of all three are given in the case studies:

- Distance and online provision, for example Liverpool Online
- Collaborative provision including:
  - locally supported validation/franchise programmes, for example see the University of the Creative Arts, Berlin School of Business and Innovation case study
  - blended learning, for example University of London
  - joint degrees, for example King's College London and Humboldt University, Berlin PhD
  - dual degrees, for example Nottingham and Tübingen University Germany
- International branch campus (IBC), for example University of Lancaster Leipzig

The models accounted for over 91,000 students in 2023/24. The breakdown between them is shown in Chart 1.

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4 [https://www.britishcouncil.org/sites/default/files/tne\\_classification\\_framework-final.pdf](https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf)

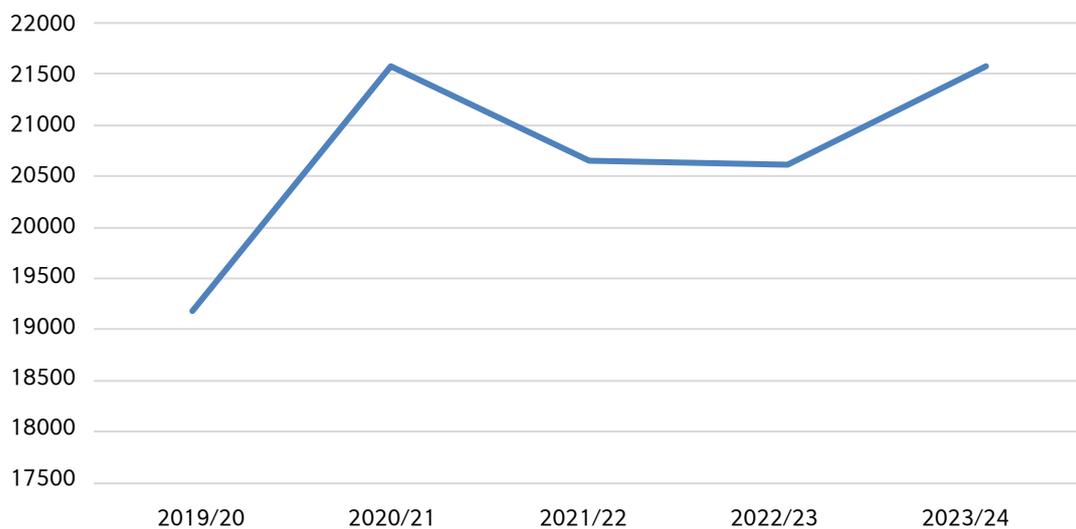
**Chart 1:** Total UK TNE students in all EU countries by type of provision<sup>5</sup>

## Distance and online provision

Excluding one provider in Cyprus,<sup>6</sup> distance and online provision in the EU has grown by 12 per cent between 2019 and 2023, with annual growth of 5 per cent in 2023, as shown in Chart 2. Chart 3 shows that Ireland and Germany are consistently the largest markets during this period, with small growth recorded across most of the top ten countries. The largest annual growth was in Greece, from a relatively low base.

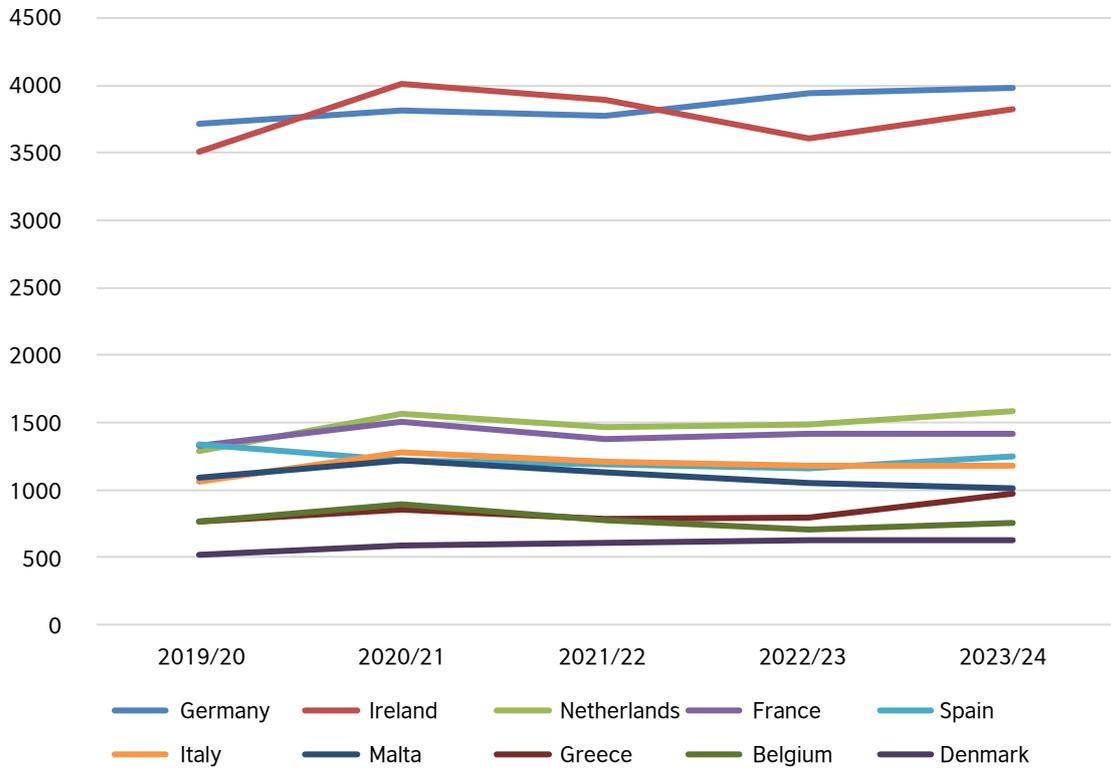
Overall numbers decreased between 2020/21 and 2021/22 but have stabilised and grown to pre-2020 levels in 2023/24. This is likely to be a result of COVID-19 restrictions on face-to-face study emerging and then easing either side of 2020.

**Chart 2** – Distance and online learning: total EU



<sup>6</sup> While the raw data (excluding withdrawn students) appears to show an overall fall of 20 per cent in distance and online provision between 2019/20 and 2023/24, all of this fall can be attributed to one large provider. This was a DL model operating in Cyprus in partnership with a private provider, which recruited large numbers in 2020 and 2021 but is now in teach-out.

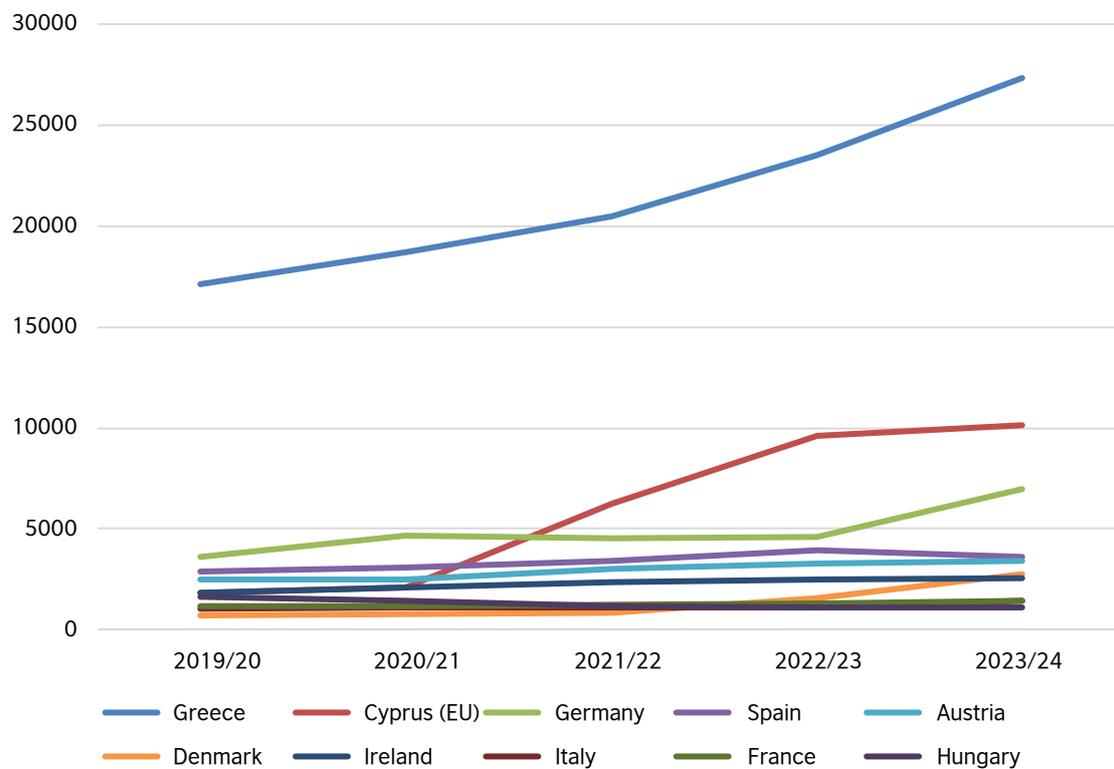
**Chart 3** – Distance and online learning: top 10 markets



## Collaborative provision (validation/franchise/ joint and dual awards)

As Chart 4 shows, there has been very strong growth in collaborative provision: 70 per cent growth between 2019 and 2023, with 15 per cent annual growth in 2023.

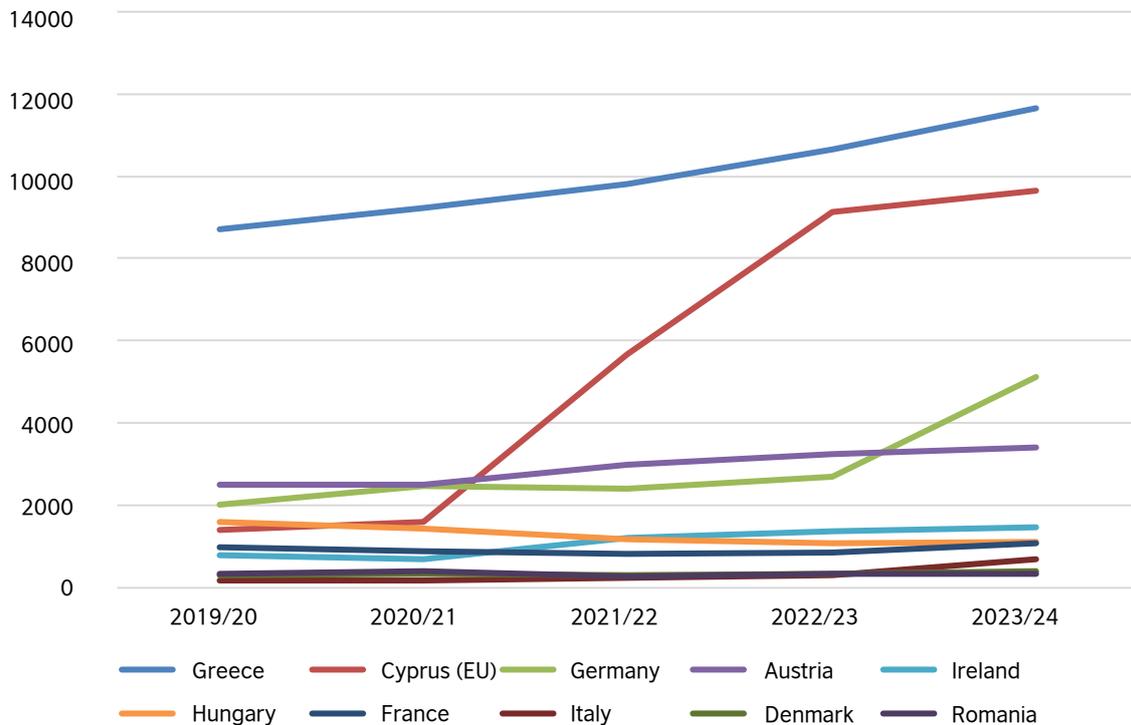
Collaborative provision in the EU is dominated by Greece, Cyprus and Germany, who between them account for nearly 70 per cent of the total EU numbers. By far the largest growth is in Cyprus, which saw a 450 per cent rise between 2019 and 2023, while recent annual growth in Germany is 50 per cent. Some smaller markets are showing significant annual growth (e.g. Denmark 79 per cent, Italy 28 per cent).

**Chart 4** – All collaborative provision: top 10 markets

HESA AOR data types do not clearly differentiate between models of provision in this category, but those students recorded as ‘registered at the overseas partner’ equate broadly to validation, while those ‘registered at the UK provider’ are students on franchise programmes, as well as those studying joint or dual degrees. We can therefore look at validation in more detail.

Validation has grown by 70 per cent across the EU between 2019 and 2023 (see Chart 5). Once again Greece and Cyprus dominate the picture, with a combined total of 58 per cent of the EU market. Germany is growing at a fast rate, with 90 per cent annual growth in 2023.

Chart 5 – Validation: top 10 markets



The case studies provide examples of how and why validation models are growing; essentially, they are responsive to local market conditions, driven by local partners knowledge and experience of local market conditions:



‘They propose courses that are well-suited to their market, and we respond, indicating our capability to support those courses.’

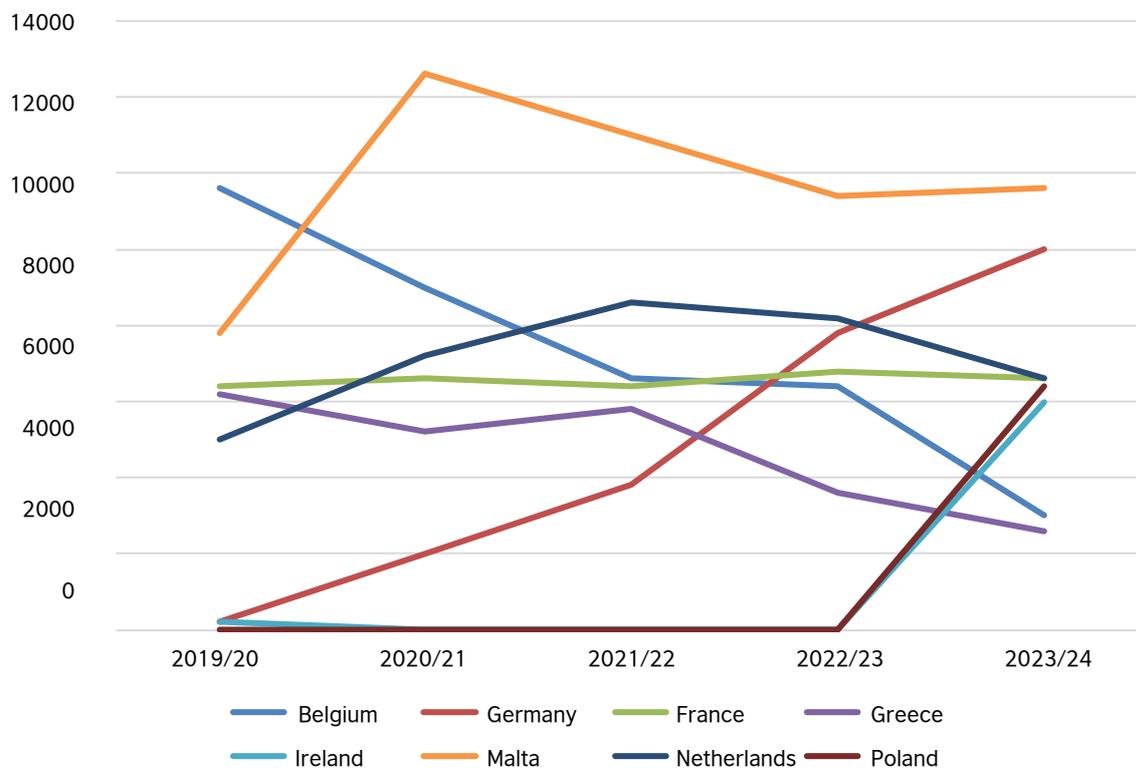
‘The programmes are designed to meet local market needs, delivered and assessed in the local language.’

‘The undergraduate programmes include bridging elements for English language, and are focused on creative industries, considered a niche in Germany with limited local provision. The specialised nature of the provision makes a paid for/private offering attractive to both German and international students.’

## Branch campuses

The HESA AOR records limited branch campus students in the EU compared to all other models of TNE, and there are only a small number of providers, so individual institutions variance in the annual recruitment cycle can have a big effect on the data. As Chart 6 shows, Malta has the most students, with Poland and Ireland recording students in this category for the first time in 2023. The decline in Belgium and the Netherlands can be attributed to closure of individual operations to new entrants. Note that, for clarity, we have excluded from Chart 6 three private providers who have recorded students in Germany for the first time in 2023.<sup>7</sup>

**Chart 6:** Enrolment at UK branch campuses 2019–2023



<sup>7</sup> Arden University, Met School Ltd and BIMM university between them have just over 3,000 branch campus students in Germany in 2023/24, the first year they have appeared in the data.

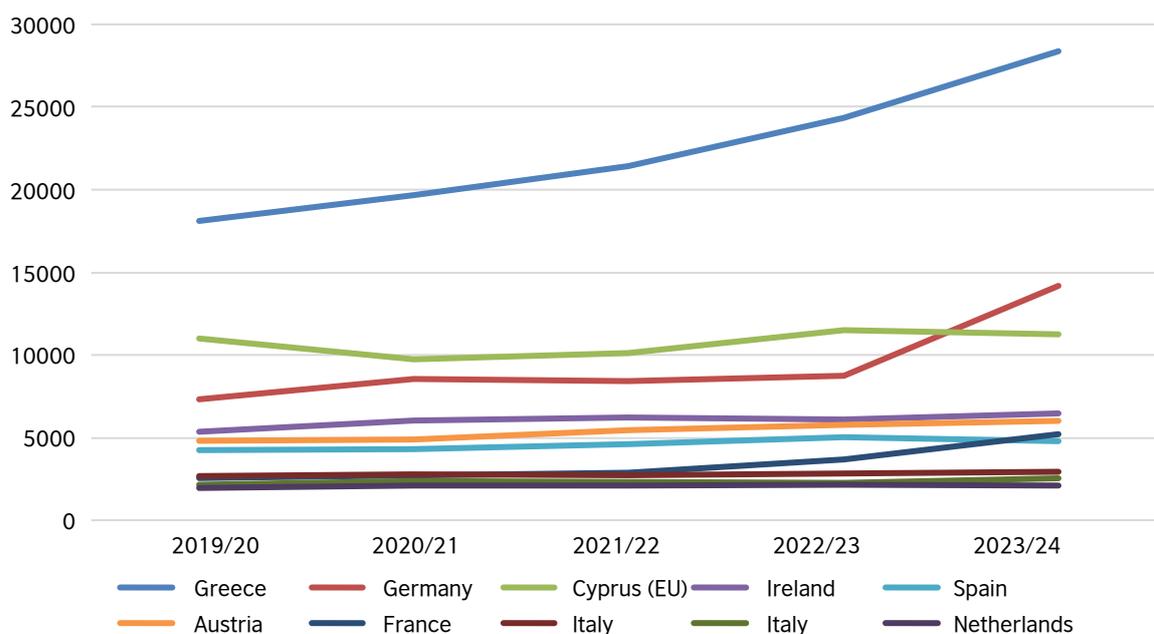
## Provision across the EU TNE markets

The top ten markets for UK TNE programmes are Greece, Cyprus, Germany, Ireland, Spain, Austria, France, Italy, Denmark and the Netherlands. Chart 7 shows the distribution (across all TNE models) between those countries from 2019/20 to 2023/24.

The top ten TNE markets in the EU grew by 16 per cent in 2023/24. Germany saw significant growth of 63 per cent, overtaking Cyprus, which saw a very small decrease in numbers, to become the second-largest EU market (see Table 1).

Across all models of delivery, the top ten countries account for 91 per cent of total EU enrolments on UK TNE in 2023/24, while the top three (Greece, Cyprus and Germany) account for 60 per cent of the total. Greece, Cyprus, Germany and Ireland are the largest markets. Other countries show strong annual growth, with Denmark growing 57 per cent and Italy growing 14 per cent in 2023/24.

**Chart 7** – All types of provision: top 10 EU markets



**Table 1:** 2023/24 annual growth, top 10 EU markets

	2022/23	2023/24	Annual growth	% growth
Greece	24,365	28,375	4,010	16%
Germany	8,765	14,255	5,490	63%
Cyprus (EU)	11,540	11,265	-275	-2%
Ireland	6,105	6,535	430	7%
Spain	5,095	4,835	-260	-5%
Austria	3,830	4,050	220	6%
Denmark	2,170	3,405	1,235	57%
France	2,880	3,015	135	5%
Italy	2,290	2,605	315	14%
Netherlands	2,200	2,165	-35	-2%

## The focus countries and their contexts

Country contexts are a major consideration in managing TNE operations. Legislative and regulatory frameworks are pivotal as gatekeepers to success or failure. In order to obtain updates on the countries, ministry and agency stakeholders were contacted and interviewed in Greece, Germany, Cyprus, Spain and Italy. As well as the regulatory requirements of each of these countries, the UK's exit from the European Union also changed the wider regulatory environment for UK TNE providers operating in the EU. Our interviews with universities, however, suggested that most had found ways of navigating the latter.

There are broadly two categories of TNE when it comes to perceptions by national policy makers and other stakeholders.

## Franchise and validation models (locally supported)

In our interviews with stakeholders, it became clear that in some countries there is an 'ambivalence' towards inbound franchise and validation models of TNE. This view tends to be associated with countries with comprehensive, free HE systems, where TNE is seen as incidental to the main HE environment, and is not a strategic priority for governments or policymakers. Examples of this attitude were seen in Greece, Germany, Italy, France and Ireland.<sup>8</sup> In these countries locally supported TNE is generally delivered through private colleges who lack degree-awarding powers and is mainly catering to mature/professional students, with a large international student body, and is delivered in partnership with private providers. Regulation is generally via local accreditation of private colleges.

Recently, Greece has moved on to develop a more supportive legislative environment for these forms of TNE including the provision for the establishment of non-for-profit IBCs as well as further streamlining the recognition process of TNE degrees.

Supportive policies have existed in Cyprus since 2005 with the legislative provision for private universities which led to the establishment of University Central Lancashire (UCLan Cyprus) in 2012. In December 2024, Cyprus passed legislation to regulate the establishment and operation of foreign university branches, allowing them to function as official branches of their parent institutions and award degrees from their home countries, subject to strict provisions including being non-profit entities.<sup>9</sup>

## Joint and dual awards (collaborative)

In all of these countries, Joint or dual awards structured within European frameworks, are strongly supported and prioritised.

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<sup>8</sup> Ireland has published clear policies for joint and dual awards and for outbound TNE by Irish universities, but this does not cover in-bound franchised/validated TNE from the UK. It is important to note that the conditions for TNE in Ireland are different because of the Common Travel Area between UK and Ireland.  
<https://www.qqi.ie/sites/default/files/2021-10/policy-for-collaborative-programmes-transnational-programmes-and-joint-awards.pdf>

<sup>9</sup> <https://cyprus-mail.com/2024/12/13/foreign-university-branches-bill-passed-with-strict-provisions>

## Greece

Greece is the largest UK TNE market in Europe, with 28,375 students in 2023/24 (a 16 per cent increase from 2022/23). In 2023/24 it ranked as the sixth-largest TNE market worldwide. The majority (75 per cent) of UK TNE students in Greece are enrolled at undergraduate level collaborative provision-type programmes.

The Greek Ministry of Education, Religious Affairs and Sports presents TNE as a core strand of its HE strategy. Recent framework laws 4957/2022 and 5094/2024 underpin this stance by authorising English-taught undergraduate, postgraduate and doctoral programmes, institutional partnerships, and joint or double degrees in state universities, while simultaneously streamlining visa and mobility procedures for foreign students and researchers.

Law 5094/2024, passed in March 2024, introduces for the first time in Greece the institutional framework for the operation of non-state, non-profit university institutions, which function as branches of foreign universities. The law stipulates that these institutions will be under the academic and administrative supervision of the parent university and provides for strict licensing procedures by the Hellenic Authority for Higher Education, with emphasis on the evaluation of infrastructure, funding, staffing and the quality of studies. The aim of the new framework is to strengthen the internationalisation of HE in Greece, reverse ‘brain drain’ and attract foreign students, while ensuring high standards of quality and sustainability for the new institutions.

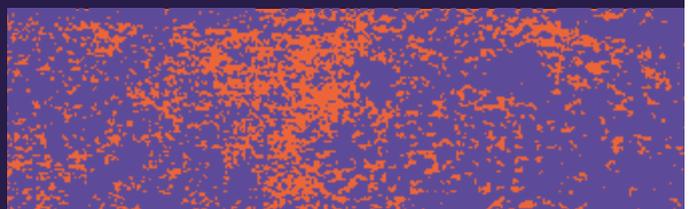
Building on this regulatory platform, the ministry highlights the UK–Greece Strategic Partnership in Education – a joint initiative with the British Embassy and the British Council – as the flagship vehicle for international engagement. It is intended not merely as a series of funded projects but as a standing channel through which Greek and UK state universities can develop double-degree curricula, staff and student exchanges, summer schools and wider knowledge-sharing. The government’s stated ambition is to turn Greece into a regional HE hub, leveraging its geographic and cultural links across south-eastern Europe and the eastern Mediterranean.

The anticipated gains flow along three interconnected dimensions. First, English-medium degrees and summer programmes are expected to attract new cohorts of international students, diversifying institutional income and campus culture. Second, structured collaboration with high-performing foreign universities promises technology transfer, joint research, and the diffusion of academic best practice. Third, by internationalising its universities, Greece seeks broader reputational dividends for its knowledge economy and soft-power presence.

The ministry's response is silent on significant market-entry barriers or reservations about UK providers; following from the reference to the UK–Greece initiative, the tone is uniformly welcoming. This suggests confidence that the 2022–24 reforms have neutralised earlier administrative bottlenecks and that stakeholder sentiment – both governmental and institutional – is broadly supportive of further UK activity. Nonetheless, the very absence of explicit challenges may mask practical issues that commonly surface in TNE – such as quality-assurance alignment, tuition-fee setting or local labour-market sensitivities, which the ministry may believe are already addressed by the new legal framework.

Overall, the policy making and regulatory developments point to a strategic focus on the use of TNE and internationalisation activities to strengthen the domestic HE offer and support education hub aspirations. Regarding TNE, there is a growing emphasis on dual/joint degrees and IBCs.

Source: Correspondence with The Greek Ministry of Education, Religious Affairs and Sports.



# Germany

In 2023, Germany overtook Cyprus to become the second-largest TNE market in Europe, and the ninth-largest worldwide.

While there is little hard data on student demographics and nationality in TNE in Germany, the stakeholders and case study participants we interviewed agreed that the profile of the students for both collaborative provision and online/distance learning is similar. The provision tends to be in specialised, niche areas and is targeted at professional/vocational programmes that meet demand which is not being provided in German universities. The students tend to be looking for part-time or e-learning programmes and many are mature students. There is also a significant number of international students attracted to these programmes. The DAAD confirmed that one of the areas where there is high demand for TNE programmes is in part-time and distance master's. German universities are 'not very flexible' when it comes to this type of programme.

According to the DAAD, the definition of TNE in Germany is quite different to the UK definition. Dual degrees are not counted, and binational universities are also excluded from DAAD's definition as they do not award German degrees.

Inbound TNE is not regulated at national level, and the DAAD has no regulatory role in TNE (provided the partnerships are not awarding German degrees or seeking federal funding). It is the individual states that make decisions on licensing for private HE providers, who in turn co-operate with UK universities to award degrees. The states also have responsibility for accrediting private institutions.

Joint and dual degrees are very much encouraged and there are no significant federal or state barriers to their implementation. There is a funding programme for double degrees/awards in DAAD. Universities must apply for this to DAAD with an existing double degree, as it is a project funding awarded directly to HEIs. Within this programme, scholarships for German students to go to the partner institution are possible. They would cover travel and (partial) living expenses. However, this is only applicable when students move physically to the UK – it would not be possible when they study a UK degree within Germany. Tuition fees cannot be covered and an institutional arrangement stipulates that a 50 per cent reduction of the regular fees has to be granted by the foreign partner (in this case the UK HEI) to apply for funding with the programme.

Stakeholders also agreed that there are challenges identifying the target audience for online degrees. Many established partnerships exist, but it's difficult to determine the nationality of students. There is also limited understanding of the demographics of online degree students, and the need to gather information on nationality to distinguish between Germans, British expats and other international students was mentioned several times in our interviews.

The question as to why Germans might pursue these alternative education options suggested the following categories:

- students in work, or those having difficulty re-entering the system after a break
- those with language preferences (English)
- lack of availability for niche professional qualifications not offered by public universities
- language policy – a majority of TNE is delivered in English. DAAD encourages bilingual degrees, and for some states these programmes are used to train skilled labour whose first language is not German.

Franchising and validation in Germany is controlled and regulated at state level; franchising is allowed in some states like Berlin but not at all, or only in very limited circumstances, in others, e.g. Bavaria or Baden-Württemberg.

German education system challenges were identified as:

- identifying the target audience for online degrees, particularly regarding demographic data and nationality
- the complexities of franchising in Germany, with some states not allowing it
- the perception of online and franchise education in Germany. Our interviews suggest that German officials seem uninterested or unaware of these programmes, possibly due to the inflexibility of the German education system and the abundance of free education options, but that occasional concerns were raised over QA.

The German University in Cairo has a branch in Germany and is attracting international students. Branch campuses can be set up in certain states as private universities.

There is no real issue with recognition of TNE degrees.

Source: Discussion with British Council Germany, Interview with the German Academic Exchange Service (DAAD) and case study participants.

## Cyprus

Cyprus is the third-largest TNE market in the EU in 2023/24, and ranks sixteenth in the world.

In Cyprus, opportunities for UK TNE were supported by the Ministry of Foreign Affairs and the Ministry of Education and Culture, who acted swiftly in 2020 in amending the relevant legislation governing TNE and cross-border collaborative arrangements (franchises) with foreign universities, so as to avoid the creation of legal gaps and prevent vagueness or uneasiness in the period immediately after the UK withdrew from the EU.

### **Current regulations: franchise and validated programmes:**

The institutions must submit to the Cyprus Agency of Quality Assurance and Accreditation in Higher Education (CYQAA) all the necessary documentation which is provided by the relevant legislation 'Quality Assurance and Accreditation of Higher Education and the Establishment and Operation of an Agency on Related Matters Laws' of 2015 to 2021 [L. 136 (I)/2015 - L. 132(I)/2021]. The agency then assesses the documentation to determine that all conditions for the provision of cross-border education are fulfilled. This is reviewed every five years. At present, the CYQAA does not have legal powers to monitor or assess provision between reviews.

### **Branch campuses – the new legislation**

A 'foreign university branches' bill was passed in December 2024, introducing strict criteria and provisions for the establishment of foreign branch campuses and teaching in English. The bill stipulates that a foreign university branch should be a non-profit legal entity, private or public, and sets a minimum number of faculties and programmes to be offered. The government's overall plan to increase the standard of HE in the Republic of Cyprus is in line with this legal development. It is also a component of the country's strategic goal to improve its educational system and establish Cyprus as a centre for high intellectual achievement. The bill makes it clear that the branches of foreign universities will operate under the same terms as HEIs already operating on the island.



'Every application will undergo thorough evaluation, just as local private universities do. This includes academic programme accreditation, faculty qualifications, infrastructure assessment and compliance with legal requirements.'

CYQAA is externally reviewed by ENQA (in line with expectations of the European Standards and Guidelines for Quality Assurance in the EHEA) and registered in EQAR, as well as the international WFME for medical schools.



**‘These criteria guarantee that foreign university branches align with European Standards and Guidelines for Quality Assurance in the EHEA and uphold quality education.’**

Cyprus is the fastest-growing market for UK TNE, with a threefold increase in TNE students between 2019 and 2022. This has inevitably led to some concern about quality, and whether Cyprus really needs more TNE provision. It has also highlighted an information gap when it comes to graduate outcomes from TNE provision. There is strong government support to be open and to attract international programmes and campuses, and it has procedures in place to allow the establishment of branch campuses and validation and franchise programmes. However, the small population and limited infrastructure mean that the CYQAA are looking at ways to improve monitoring of existing programmes, and to encourage new programmes that offer something different, are innovative and of high quality.

The newly passed legislation establishes a clear framework for foreign universities seeking to operate in Cyprus. It introduces strict criteria to ensure quality education, with oversight by the Cyprus agency of quality assurance and accreditation in HE. Foreign institutions must meet the same standards as local universities, including accreditation and financial sustainability requirements. The law aims to attract reputable institutions while safeguarding the credibility of the country’s HE sector.

The CYQAA would like to see more data and analysis of graduate outcomes for TNE students. This would enable a better understanding of the benefits TNE brings to students and support more evidence-based expansion of TNE in Cyprus.

Cyprus is open to TNE, with government support demonstrated by the new law on branch campuses and the ongoing recognition of franchise and validation programmes. In order to facilitate sustainable growth, it is seeking to attract high-quality providers and programmes that provide something new and innovative. Positive engagement with CYQAA is encouraged and welcomed.

Source: Interview with the Cyprus Agency of Quality Assurance and Accreditation in Higher Education (CYQAA), May 2025.



## Summarising the EU TNE landscape

The key feature of the current landscape is that it is one of continuing growth in which the UK HE sector is currently the leading TNE player:

- overall growth for all TNE types in EU countries is 37 per cent between 2019 and 2023
- annual growth rates have been steadily rising; they were 3 per cent (2021/22), 9 per cent (2022/23) and 15 per cent (2023/24)
- this growth has been driven by collaborative provision models
- the top ten countries account for 91 per cent of the total EU market in 2023/24
- Greece dominates in terms of numbers, with 31 per cent of the total EU market in 2023/24
- the second-largest market is now Germany, which has overtaken Cyprus to enter the top ten global markets for UK TNE
- Greece, Cyprus and Germany together account for 60 per cent of the total EU market
- strong growth in smaller top ten markets in 2023/24 was seen in Denmark (7th), with moderate growth also in Ireland (4th), Austria (6th), France (8th) and Italy (9th).

## How the EU compares with key TNE destinations globally

The significance of TNE's growth in EU countries becomes very visible when compared to other global destinations for UK TNE. We have taken East Asia, South Asia and the Middle East/North Africa as comparator examples since they represent the largest and most important global markets for UK TNE. This shows:

- the HESA AOR data for 2023/24 indicates UK TNE in the EU saw annual growth of 9 per cent (compared to 5 per cent growth in East Asia)
- the Middle East/North Africa and South Asia markets grew by 11 per cent and 12 per cent respectively
- growth in the EU is accelerating, while 'East Asia's share of global UK TNE enrolments continues to fall, as growth in TNE enrolments in other regions of the world has outpaced the larger and more mature TNE markets in East Asia. From a peak of 42 per cent of all UK TNE enrolments in 2010/11, the region's share of UK TNE enrolments worldwide fell to 32 per cent by 2023/24'.<sup>10</sup>
- The EU share of global TNE enrolments in 2023/24 is 15 per cent, up from 11 per cent in 2019/20
- East Asia is still by far the largest and most important market for UK TNE, with just under 200,000 enrolments, but the EU is growing particularly fast in 2023/24, with 91,700 UK TNE enrolments in the EU.

Region	2022/23	2023/24	% increase	% share of global total
East Asia	188,130	197,470	5%	32%
Middle East/North Africa	105,240	118,250	12%	19%
South Asia	97,475	108,315	11%	17%
EU	84,090	91,700	9%	15%



# 2 Trends and policy issues affecting TNE delivery models

## Trend towards joint ventures in the establishment of international branch campuses

There is a clear trend toward joint ventures in the establishment of international branch campuses (IBCs) rather than independent institutions. There are several factors underpinning this trend, which are summarised below:

**Shared Resources and Risk:** Joint ventures allow universities to share financial risks and resources, making it easier to establish IBCs and increasing their chances of success. This has resulted in a growing number of universities working alongside an investment partner, who is responsible for the capital investment in infrastructure and takes on responsibility for non-academic related activities. In addition, universities are opting to form joint ventures with local partners or other international institutions to set up IBCs. For example, Lancaster University in Leipzig is a joint venture with Navitas, who are responsible for premises and professional services including student recruitment and agent management.

**Local Relevance:** Collaborations with local institutions or governments enable IBCs to better align with the economic and social development goals of the host country.

This shift highlights a broader trend in TNE, moving away from traditional standalone branch campuses and fostering deeper integration with the host country's educational and economic systems.

The complementary trend lies to the south and east, where governments are looking to attract foreign branch campus investment. This has the potential to attract international students by implementing new legislation to allow the establishment of foreign branch campuses. Greece and Cyprus are at the forefront of this trend. Our case studies demonstrate the importance of long-standing strategic partnerships with private colleges, which have become significant institutions in the region and are now on the journey to fully recognised branch campus status. The University of East London (UEL) and Metropolitan College are looking forward to:



‘the partnership entering an exciting new phase with plans underway to develop a UEL IBC in Greece. This initiative represents a deepening of the relationship between UEL and Metropolitan College, and a strategic expansion of UEL’s international presence. While the specific academic offer is still being developed, the IBC is intended to serve as a hub for innovation, knowledge exchange and cross-border collaboration. It will provide enhanced opportunities for staff and student mobility, foster joint research initiatives and support the long-term sustainability of the partnership within the region.’

In Cyprus, new legislation will allow foreign branch campuses from 2026.

## Quality assurance issues

The diversity of approaches to quality assurance (QA) across the UK’s nations presents a potential challenge for English TNE providers, as HE – and the approach to QA – is devolved across each. Scotland, Wales and Northern Ireland have QA frameworks that are overseen by the Quality Assurance Agency<sup>11</sup> and continue to be fully compliant with the European Standards and Guidelines for Higher Education (ESG)<sup>12</sup> in England; however, the Higher Education and Research Act<sup>13</sup> established the Office for Students (OfS) and, from March 2023, the Quality Assurance Agency stepped back from its role as the Designated Quality Body. Currently, the OfS’s regulatory framework is partially compliant with the ESG.<sup>14</sup> Since the majority of UK TNE in Europe is delivered by English HEIs, there is potential for this to challenge its continuing sustainability. This issue has been highlighted in both Bulgaria and Romania, but the likely wider effect of this is currently unclear,<sup>15</sup> although the OfS and others are actively exploring ways to resolve this issue.

11 Scotland: Quality Enhancement Framework Scotland <https://www.qaa.ac.uk/scotland/quality-enhancement-framework>; Wales: Quality Assessment Framework for Wales <https://www.medr.cymru/wp-content/uploads/2024/07/Quality-Assessment-Framework-July-2022-English.pdf>; Northern Ireland: Northern Ireland Quality Assurance of Higher Education <https://www.economy-ni.gov.uk/publications/northern-ireland-quality-assurance-higher-education>

12 [https://www.enqa.eu/wp-content/uploads/2015/11/ESG\\_2015.pdf](https://www.enqa.eu/wp-content/uploads/2015/11/ESG_2015.pdf)

13 <https://www.legislation.gov.uk/ukpga/2017/29/contents>

14 The European Higher Education Area in 2024: Bologna Process Implementation Report p. 79, figure 2.16.

15 in their 2025–2030 strategy the OfS states they have plans to ‘work with the sector to explore options for alignment with European standards for quality’.

## Higher education diplomacy – how TNE supports soft power, growth and capacity-building

Previous British Council research, *The Value of Transnational Education partnerships* (2022),<sup>16</sup> highlighted that TNE often improves the quality and diversity of an institution's offer, enabling it to develop and thrive. Some institutions enter a TNE partnership to learn from a more prestigious university and accelerate their organisational development. The arrangement may focus on revenue maximisation in the early years, but as they mature and build their brand in the local market, motivation shifts to leveraging the partnership to acquire degree-awarding rights. In Greece and Cyprus, we are seeing a maturing of partnership types from franchise/validation to autonomous (IBCs) which are more multidimensional (proxy for soft power). Metropolitan College in Greece provides a case in point; having built significant scale through franchise and validation partnerships, its planned progression towards an IBC with the UEL exemplifies this evolution. This suggests TNE can be a driver in the progression from one-directional towards more multi-directional models of HE collaboration.

## TNE and broader university partnerships as an entry route into UK higher education

TNE offers a cost-effective option for international students to enter first-degree programmes in the UK. This is documented in analytical studies by the Higher Education Funding Council for England and updates published by the British Council and UUKi.<sup>17, 18</sup>

While this is a rather more limited phenomenon in EU countries compared to other regions, there are examples of students progressing to the UK as part of dual-award arrangements (e.g. Nottingham Tübingen). The UEL's Global Scholarship programme provides partial scholarships for all its TNE students who want to continue their studies in London (see case study). A number of Memorandum of Understandings (MoU) have been signed between Northern Ireland and the Republic of Ireland in recognition of importance of TNE collaboration and mobility.<sup>19</sup>

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16 [https://www.britishcouncil.org/sites/default/files/value\\_tne\\_fullreport.pdf](https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf)

17 [https://dera.ioe.ac.uk/id/eprint/21497/1/HEFE2014\\_29.pdf](https://dera.ioe.ac.uk/id/eprint/21497/1/HEFE2014_29.pdf)

18 <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/transnational-routes-shore-uk-higher>

19 For example: <https://www.ucd.ie/research/news/2022/universitycollegedublinandqueensuniversitybelfast-strengthencollaboration/body,619497,en.html>

## Branch campuses – post-2020 models

There are several obstacles in evaluating the trends related to branch campuses within the EU. Of the eight campuses that reported student enrolments in 2020, four have since closed. However, in 2023 several private universities reported significant numbers of branch campus students in Germany and Ireland for the first time.

Our analysis indicates that we are witnessing a significant change in the models following the UK's withdrawal from the EU, primarily driven by financial sustainability of models which relied on UK branch campuses in the EU being treated as domestic universities; they could do almost anything domestic universities were doing. Several branch campuses were operational before 2020, and they faced difficulties in handling the consequences of maintaining financial viability under EU regulations as 'foreign' providers, including issues related to staff contracts and mobility. The UK's changed status in the EU after the end of the transition period meant that UK staff could no longer teach TNE programmes, which, coupled with rising operational costs and broader financial challenges, led to the University of Kent closing its Brussels School of International Studies in 2023 after 25 years of operation.<sup>20</sup> Post-2020, many universities' TNE operations faced challenges and had to evolve in the new operating environment.<sup>21</sup> Those that did not adapt had to close down.

## The adaptors

The case studies demonstrate the different focuses adopted by those branch campuses that have thrived through the UK's withdrawal from the EU and beyond. These include:

### The importance of place

Lancaster Leipzig – place is a major strategic and operational consideration. Lancaster aims to develop place-based, locally relevant curricula delivered by local staff.

### International student focus

Lancaster Leipzig's partnership with Navitas has enabled an international focus, with 95 per cent of students being international, coming from 90 countries.

### The challenges

For University of London Paris Institute and Queen Margaret University (QMU) in Paris, operating is more difficult post-2020 for everybody:

- It is more difficult for students, because they need a student visa and because they can't necessarily stay on and work after their studies.
- It is more complicated for teachers to ensure their legal status under local labour laws.
- It is more complicated for visiting faculty.

20 <https://www.universityworldnews.com/post.php?story=20230419150839674>

21 <https://opportunities-insight.britishcouncil.org/features/european-demand-uk-transnational-education-opportunities-and-challenges>

Queen Mary/University of London in Paris: (from case study)



‘The UK’s withdrawal from the EU, the current HE climate in the UK and the bureaucracies of the French HE system are just some of the challenges that impact our activities in Paris. Our main response to these challenges is the creation of strong partnerships locally, which not only allow us to establish QM presence in Paris, but also to gain a deeper understanding and enhanced support in matters that affect our programmes, and consequently our students.’

#### **Motivations and drivers – beyond the financial**



‘Lancaster sees TNE partnerships, including Lancaster University in Leipzig, as long-term ventures with plans to expand from teaching to include research and engagement activities. Their approach focuses on building long-term partnerships and international relevance.’

The University of London Institute in Paris (ULIP) model doesn’t make significant profits, ‘so you must do it for other reasons; the fact that you build the European links, which, of course, campuses are brilliant doing that; or you’re giving your students something very special.’

The 2023/24 HESA AOR has also revealed a number of UK private universities have established branch campuses in Germany in 2023, with significant enrolments reported. These institutions are offering courses in subjects such as business and management, computing and IT, criminology, data analytics, finance, graphic design, health and social care, human resource management, law, marketing, psychology, and tourism.

## The evolution of TNE in host countries

TNE often emerges in host countries where the local HE system faces supply constraints, which can include a lack of flexible study modes, or lack of supply in specialist-employment-related disciplines, initially developing through models like franchising and validation to meet demand. As local HE systems mature and TNE becomes better regulated and integrated, there is potential for a transition towards more advanced forms, such as collaborative degrees (joint/dual) and significant local presences like IBCs or locally supported online provision. However, this evolution is not strictly linear; various TNE models often co-exist, adapting to specific market niches, institutional strategies and the unique context of the host country. The boundaries between models are also blurring, leading to more complex, multidimensional partnerships.

## Policy and quality assurance as enablers

The host country's policy environment and QA frameworks are critical enablers for the development of TNE. Clear, transparent and supportive regulations regarding the establishment, operation and accreditation of TNE activities build provider confidence and facilitate growth. Robust QA systems, integrated with national frameworks and potentially involving international collaboration, are essential for ensuring the quality and standards of TNE provision, safeguarding institutional reputation and building trust between stakeholders. Crucially, policies governing the academic and professional recognition of TNE qualifications significantly affect TNE's integration and the types of models that can flourish. Conversely, restrictive, ambiguous or unstable policy environments, coupled with weak QA, can hinder TNE development, limit it to less-complex models and create persistent reputational challenges.

The contrasting experiences of Greece and Cyprus illustrate the effect of regulatory context. In Greece, long-standing constitutional restrictions (Article 16) prohibited private universities, channelling TNE primarily through private colleges via franchise and validation models. Despite significant market demand, the lack of academic recognition for these qualifications hindered TNE's integration and the development of more advanced models, until recent legislative reforms in 2024 aimed at allowing foreign university branches and addressing recognition issues. In contrast, Cyprus enacted legislation enabling private universities earlier (Law 109(I)/2005). This, combined with a strategic goal to become an HE hub and the development of QA mechanisms, created a diverse HE ecosystem capable of supporting various TNE activities, including IBCs, and attracting a large number of international students, notably from Greece.

There has been an MoU between Ireland and UK education QA regulators since 2018, highlighting the importance of strengthening strategic partnerships to effect system change.<sup>22</sup>

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22 <https://www.qaa.ac.uk/news-events/news/qaa-renews-memorandum-of-understanding-with-quality-and-qualifications-ireland#:~:text=QAA%20has%20renewed%20its%20Memorandum%20of%20Understanding%20with,and%20quality%20assurance%20in%20the%20Republic%20of%20Ireland>

## The rise of edtechs

The entry and growth of edtech companies and other commercial players in HE has increased competition, providing more affordable, flexible, and often more job-relevant alternatives to traditional degrees. This environment forces universities to consider price cuts, adopt new technologies and innovate in ways that make education more affordable and accessible. The interplay of technological advances, alternative credentialing, corporate involvement and rising student debt pressure means that universities must adapt to a more competitive pricing environment or risk losing market share to edtech firms.

The case studies demonstrate the ways in which universities have adapted to this new competitive environment.

# 3 The case studies

## Background

The three main TNE models in the EU have very different characteristics and carry different operational risks and benefits.<sup>23</sup> In order to understand these, 15 case studies have been produced with UK universities delivering TNE operations in Germany, Greece and Ireland. A few case studies outside those countries are also included; for example, online learning providers who also deliver worldwide. Three case studies are also included from France and one from Italy, because these provide examples of distinctive operational types of UK TNE. The full list of case studies is set out in Appendix 3.

The main focus of the case studies was to explore the practicalities of how universities operate and manage TNE delivery in selected EU countries. In developing them, we sought information from interviewees on types of TNE collaboration, business models, governance and management arrangements; relationships between the partners; student experience; operational challenges; and future sustainability. We also asked universities to identify key lessons to share with the UK sector.

The case studies illustrate a range of delivery models, including validation, franchising, dual degrees, distance/online learning, and international branch and multi-campus. We have grouped the findings under the three main types of TNE model. Provision varies in size from delivering a single postgraduate course to delivering over 70 undergraduate and postgraduate courses. Student numbers range from 40 to 5,000.

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See Appendix 1 for classification.

## Transnational education case studies summary

This table presents a summary of TNE case studies, structured by background, governance, sustainability and student experience. Each case study highlights unique approaches, partnership models and outcomes across a range of UK university collaborations.

Case Study	Background	Governance	Sustainability	Student Experience
<b>University of East London (UEL) and Metropolitan College, Greece</b>	Largest UK-led TNE provision in Europe, with 5,000+ students across 8 campuses since 2011	Strategic Memorandum of Agreement with shared academic governance and operational responsibility	Planning a UEL IBC to support long-term engagement	Student feedback shows: high satisfaction and employability; diverse intake; strong support systems, including scholarships
<b>University of London Institute in Paris (ULIP)</b>	Originated in 1894; now a central institute of the University of London (UoL) offering undergraduate and postgraduate programmes	ULIP is part of UoL; follows UK governance; employs staff under French law	Registered as a private institution in France; financial support from UoL; moderate growth trajectory	Immersive French environment; low fees; student visa barriers post-Brexit; strong satisfaction
<b>CITY College, University of York Europe Campus, Greece</b>	Established post-Cold War; Russell Group collaboration; broad regional engagement	Programmes validated by University of York; QA aligned with UK and EU standards	Applying for university legal entity in Greece; strategic growth with new Law School in 2025	Personalised recruitment; caters to regional diversity; strong student voice and engagement as part of the QA
<b>King's College London and Humboldt University, Germany</b>	30+ years collaboration starting with law; expanded into joint PhDs and networks	Joint Academic Committee oversees programmes; co-funded faculty; supported by DAAD	Long-term partnership; embedded in Circle U alliance; funded initiatives	Two-directional student flow; feedback shows strong outcomes; high-profile networks and support
<b>King's College London and Luiss, Italy</b>	Partnership began in 2019 with dual degrees in law and European studies	Joint steering committee; bilateral operational management	Plans for expansion; supported by institutional complementarity and capital city location	Flexible pathways; opportunities for internships to support employability; international appeal with growing alumni network
<b>London Metropolitan &amp; Portobello Institute, Ireland</b>	Validation partnership delivering vocational programmes in early childhood, fashion, sports and health	Validation model; London Met oversees QA, Portobello designs and delivers programmes	Revenue-driven expansion; long-standing partnership; flexible and cautious programme development	Individual records are maintained to better support students; grants are available; progressions to the UK are possible
<b>University of London (UoL) online delivery in the EU</b>	Distance learning provision with 5,000+ students in the EU; partnerships with recognised teaching centres (RTCs) and Forward College	UoL manages all academic matters; RTCs assist with blended support; QA aligned with UK standards	Online growth with regional variation; RTCs declining; innovation with Forward College model	Support for mature, professional learners; varied formats; student choice and flexibility are critical
<b>Lancaster University Leipzig</b>	Launched 2020 with Navitas; strong focus on business and IT; rapidly expanded student base	Navitas handles ops; Lancaster oversees academic content; shared values guide operations	Place-based strategy; local relevance and research-driven curriculum drive growth	Focus on integration of students, development of German skills, employability; growing demand for mobility

<b>Nottingham and Tübingen University, Germany</b>	Dual master's degree in business and economics; jointly delivered and supervised	Joint admission, supervision, QA and funding applications; strong institutional ties	Brexit reduced German student interest; scholarships and DAAD support planned	Data collections showcasing strong outcomes, research and career progressions for EU and global students
<b>Queen Margaret University (QMU) &amp; Metropolitan College, Greece</b>	Started in 2001; 12 undergraduate programmes across 8 sites; evolving to include franchise delivery	Validated provision; delegated responsibilities with clear QA oversight from QMU	Operational improvements enable scalable growth; monitoring of Greek HE legislation	Greek school leavers; inclusive support; student surveys to collect feedback and inform improvements
<b>Queen Mary University of London Centre for Commercial Law Studies (CCLS) Paris</b>	LLM in Paris launched in 2012 under ULIP partnership; aligned with CCLS London offer	CCLS leads QA and operations; ULIP provides facilities and support; partnership with Sorbonne, Paris Bar	Expansion planned; enhanced profile and niche appeal; local support systems developed	Flexible delivery; diverse cohorts; close-knit community; dual support from Paris and London
<b>University of the Creative Arts (UCA) and Berlin School of Business and Innovation (BSBI), Germany</b>	Started 2020; franchise and validation models; 4,000+ students across Berlin and Hamburg	UCA responsible for QA; training provided to BSBI staff; courses regulated per State	Fastest-growing UK TNE in Germany; strong demand in creative sector	International and German students; supports students with varied needs; support via BSBI and UCA QA
<b>University of East London (UEL) &amp; Rheinische Hochschule (RH) Köln / Academic Institute for Higher Education (A IHE), Germany</b>	Dual MBA with RH Köln; specialist online MSc with AIHE for professionals	Dual delivery with RH; AIHE fully online; UEL ensures QA and validation	Targeted at professionals; steady growth; strategy aligned with UK priorities	Blended and online models; global scholarships; professional and German students
<b>London South Bank University (LSBU) &amp; International University of Applied Sciences (IU), Germany</b>	Started with validation; IU grew to 140,000 students; now Germany's largest university	LSBU manages QA for its degrees; IU controls delivery; evolving power balance	Growing partnership; challenges in data sharing and mutual understanding	Mature, flexible learners; blended delivery; support via IU and LSBU link tutors
<b>University of Liverpool Online</b>	Started 2000; now 22,000 postgraduate students globally; partnership with Kaplan since inception	Liverpool sets academic direction; Kaplan delivers teaching and support; strong co-ordination	Growing postgraduate market; competitive pressures from edtech; agile model needed	Mature CPD learners; asynchronous model; high-quality support and career focus

## Lessons from the case studies

There were eight commonly agreed lessons that hold true across all types of TNE. Examples are included from the case studies.

### 1. Strategic alignment and objectives

Institutions emphasise the need for clarity on mutual objectives, clearly defining what each partner aims to achieve, ensuring values and goals align and partnerships are mutually beneficial and supportive. The case studies illustrate the genesis of a range of TNE partnerships. Some, for example, grew from existing collaborations between academic departments, some from approaches to UK institutions by colleges without degree-awarding powers, and some where the initiative was from institutions seeking to extend their operations. Sometimes, partnerships were also about sharing accommodation. Institutions described a range of different strategic drivers for TNE. The need for strategic alignment, however, holds true across these – whether partners' objectives are to deliver local, more widely accessible HE, to capitalise on location (Kent, Lancaster), or to build foundations for future research. Identifying the right partner is seen as essential – and in choosing partners it's important to be realistic about what an institution actually needs to deliver a successful TNE operation. One institution noted, 'there's a tendency to think you need a better, higher-rated, partner, but this may not give you what you need'.

**Example 1:** Nottingham and Tübingen University clearly define shared objectives in their dual master's programme, focusing on academic excellence and joint supervision of dissertations, which ensures alignment and shared goals between both institutions.

**Example 2:** King's College London and Humboldt University's long-term collaboration includes joint PhDs and shared research programmes, built on aligned academic priorities.

### 2. Financial sustainability and operational efficiency

Financial sustainability is critical. Building a robust business model able to balance investment and return is seen as an essential condition for success. While the major costs of most TNE operations are staffing and accommodation, for certain types of TNE there may be other costs, such as those attached to teaching in the local language, or providing student services (including those needed to meet student expectations), or library licences for international access to publications. Regardless of the type of TNE and the division of responsibilities between the partners, understanding and balancing the income from students and the expenditure incurred is vitally important. It was noted that getting the right financial balance and related operational efficiency may affect the strategic aims of the provision, leading to some difficult practical choices. So, for example, should places be offered to students to widen access to HE and diversify the student body, or should they be offered to students who can demonstrate the financial means to pay? Also, how does an institution balance the additional cost of teaching in the students' language against the objective of meeting local needs?

**Example 1:** The University of Kent's operations in Paris illustrate the critical importance of sustainable business models, where operational decisions explicitly balance income with high staff and facilities costs, reflecting a realistic approach to financial management.

**Example 2:** Liverpool Online's partnership with Kaplan leverages a scalable digital delivery model to balance quality and cost while expanding globally.

### 3. Legal and regulatory challenges

Understanding the legal and regulatory framework of the country is extremely important. Some legislation results in major opportunities for TNE. In March 2024, for example, Greece passed a law allowing private universities and the establishment of foreign university branch campuses within the country. Beyond that, case studies commonly cite issues with administrative processes, particularly related to regulatory compliance (e.g. visas, accreditation, recognition of qualifications). Challenges have intensified due to geopolitical changes, in particular the UK's withdrawal from the European Union, requiring agile administrative responses. A country's labour laws may also determine the terms and conditions of staff employment. Institutions pointed to residency requirements for teaching staff and the linking of salaries to inflation affecting delivery costs.

**Example 1:** CITY College, University of York Europe Campus has made an application to obtain university legal entity status in Greece under the newly legislated HE reforms.

**Example 2:** After the UK left the EU, the University of London Institute in Paris (ULIP) faced significant administrative complexity regarding visa and employment regulations for British students and staff, illustrating the broader challenges faced due to political changes.

### 4. Partnership management and communication

In addition to contractual agreements, clear management structures, defined roles and regular, transparent communication between partners at strategic and operational levels are seen as essential. Institutions frequently underscore the importance of having dedicated partnership management teams and clearly integrated operational structures. Within institutions, the relationship between academic departments who 'own' the programmes and those responsible for their delivery needs to be agreed. In some examples, the partnership relationship is managed by the academic department, while in others by the institution's partnership team. One institution employs 'link' tutors. Proactive communication is seen as critical to operational success, and institutions acknowledge that this requires significant investment of staff time (and often travel costs as well). However, they see this as an investment that delivers significant returns in terms of the progression and smooth running of TNE operations and delivery.

**Example 1:** CITY College, University of York Europe Campus operates through clear governance and administrative frameworks, with extensive engagement and collaboration via formal steering committees and frequent communication, ensuring smooth partnership management.

**Example 2:** Nottingham and Tübingen University maintain strong collaboration through regular steering committee meetings and joint academic management.

## 5. Quality assurance and academic standards

Quality assurance (QA) and academic standards are seen as a core part of managing TNE operations. Regular quality monitoring processes, due diligence in academic mapping, moderation of assessments and consistent application of standards across multiple delivery sites are crucial. The case studies show that partners frequently undertake periodic reviews and risk assessments, and ensure rigorous academic governance.

In the case of double/dual degrees involving English universities, there is a potential barrier caused by the OfS's part-compliance with the European Standards and Guidelines. The case studies, however, provide no evidence of this as a barrier.

**Example 1:** QMU and Metropolitan College in Greece implement extensive moderation and external examination procedures across multiple campuses to ensure parity and maintain high-quality standards uniformly.

**Example 2:** CITY College and University of York ensure rigorous QA by integrating UK and European standards across multi-country delivery.

## 6. Cultural sensitivity and local relevance

Case studies point to the importance of adapting programmes to ensure relevance to local contexts and cultures. Depending on the TNE model and institutional type, benefits include increased attraction to students, market growth, potential access to wider research networks, and a strengthened global footprint and influence. Adaptation requires that institutions' staff develop an understanding of country context(s), and some institutions provide training to support this. Cultural sensitivity is also seen as important in understanding 'internal' academic approaches and processes. Institutions cite examples where their (and their partner's) lack of awareness of their different academic cultures, expectations and assumptions created operational barriers.

**Example 1:** UEL's programmes in Greece deliver degrees in Greek language, which demonstrates sensitivity and responsiveness to local educational preferences and increases accessibility for Greek-speaking students.

**Example 2:** Lancaster University Leipzig embeds German language learning and local work opportunities to adapt UK curricula to the German context. They also employ staff who have experience of working in both the German and UK HE systems.

## 7. Student experience, employability and diversity

Institutions maintain databases for tracking alumni and their outcomes, emphasising strong relationships with students to facilitate feedback and continuous programme improvement. Specific efforts are made to measure and improve student satisfaction and outcomes. Institutions report that they use the same approach and tools as they do for their UK campus students.

A significant focus is placed on the employability of graduates, with partnerships often specifically designed to improve career outcomes. TNE programmes frequently

integrate practical experience components, such as internships and specialist training modules to enhance graduate competitiveness. This is seen as important at both undergraduate and postgraduate levels. In terms of the latter, institutions report that many of their students are mid-career 35–40-year-olds looking for professional updating or career advancement.

The case studies illustrate a sensitivity to student diversity and an aim to provide equitable experiences across programmes. Issues around accessibility and inclusivity, particularly for international students, are actively addressed through targeted student support and adjustments in programme delivery.

**Example 1:** UEL and Metropolitan College (Greece) maintain high student satisfaction and employability by embedding student feedback and offering bilingual delivery.

**Example 2:** QMUL's CCLS in Paris provides strong career-focused opportunities, integrating with local law firms and offering career mentoring schemes explicitly tailored to students' professional ambitions.

**Example 3:** Forward College promotes inclusive access through scholarships and personal tutoring across campuses in Paris, Lisbon and Berlin.

## 8. Sustainability and innovation

Many institutions point to the rapidly changing HE landscape both in Europe and globally. This means an increasingly competitive student market with downward pressure on pricing. The entry of edtech companies and equity-backed private institutions offering world-leading digital infrastructure is disrupting traditional programme delivery. At the same time, UK universities are facing significant funding gaps. Many HE providers are responding with significantly changed strategic and operational priorities. For some this means exiting the market; for others it means seeking new investment and major revision of both their operations and delivery methods. Many case studies demonstrate a strong commitment to respond to the changing educational needs and market demands. There are notable cases of radically new TNE models emerging that embrace new partners, along with flexible programme structures with innovative delivery methods. Case studies cite hybrid and online teaching methods, personalised learning and interdisciplinary approaches as examples of the latter.

The changing landscape is prompting institutions to reassess the sustainability of their existing TNE delivery models and to examine options for the future. Questions here include if, and how, options might meet future institutional strategic priorities, and whether current partners are the right partners for the future.

**Example 1:** Metropolitan College has successfully built a multi-campus model with eight campuses and venues across Greece. An acquisition deal worth €250 million supported ongoing expansion, digital transformation and potential international ventures. The college delivers a scalable, regionally distributed TNE system that blends local responsiveness with centralised quality control.

**Example 2:** LSBU negotiated a validation agreement with the IU some six years ago. Initially a small community-based institution, IU has grown to become Germany's largest university, providing online courses to 140,000 students through a world-class digital infrastructure.

# Conclusion:

## TNE in the EU: growth potential and the emergence of sustainable partnerships

The evolution of UK TNE across the EU reflects a phase of consolidation, innovation and growing maturity. Five years after the UK's withdrawal from the EU, UK HEIs have demonstrated adaptability and resilience. The findings from this research – combining quantitative data and qualitative evidence from 15 institutional case studies – show that UK universities are maintaining a strong presence across the continent by reconfiguring partnerships, adopting digital delivery models and embedding sustainability into their operations.

### Adapting to context and regulation

The quantitative evidence confirms a positive trajectory. Between 2019 and 2023, overall UK TNE enrolments in the EU grew by **37 per cent**, raising the EU's share of total UK TNE students from 11 per cent to 15 per cent (see Chart 1). Collaborative provision – including validation, franchise and dual/joint awards – has been the main growth driver, increasing by **70 per cent** over the same period (Chart 4). Greece, Cyprus and Germany together account for almost 70 per cent of UK TNE enrolments in Europe, with Germany showing the strongest annual increase in 2023 at **63 per cent** (see Table 1).

The case studies highlight that success is highly context-dependent. In Greece, the UEL and Metropolitan College partnership has grown into the largest UK-led TNE initiative in Europe by aligning academic quality with national regulation and student needs. In Germany, Lancaster University Leipzig has demonstrated how a branch campus can thrive through localised governance, employer engagement and research integration. Partnerships such as King's College London with Humboldt University and Luiss University in Italy show that sustained collaboration and trust between institutions create resilience in complex policy environments.

## Innovation and digital transformation

Innovation in digital delivery and hybrid learning is reshaping the TNE landscape. The data show a **12 per cent increase in distance and online enrolments** since 2019 (Chart 2), with Europe emerging as a significant hub for online and blended provision. Partnerships such as the University of London's collaboration with Forward College – spanning Lisbon, Paris and Berlin – combine the flexibility of online study with the benefits of cross-border mobility and immersive learning. Similarly, Liverpool Online has demonstrated how digitally enhanced programmes can support professional learners and maintain academic rigour at scale.

Across these examples, digital transformation has underscored the importance of pedagogy, student support and data-driven QA. Universities have learned that success depends not only on technological capacity, but also on careful integration of local expectations, student experience and employer relevance.

## Sustainability, quality and mutual benefit

A central insight emerging from the case studies is that **sustainability in TNE delivered in the EU depends on strategic alignment and mutual value**. Successful partnerships invest in governance structures that distribute responsibility clearly and promote shared decision-making. Institutions such as CITY College, University of York Europe Campus illustrate how long-term collaboration, local capacity-building and alignment with national education priorities lead to sustained growth and credibility.

QA remains the cornerstone of these relationships. Whether through formal validation frameworks, joint academic boards or locally employed academic staff, UK universities continue to prioritise consistent standards, transparency and accountability. The London Metropolitan University–Portobello Institute partnership in Ireland and QMU's work in Greece both demonstrate how clear quality mechanisms reinforce student confidence and institutional reputation.

Importantly, the case studies also reveal that TNE partnerships prosper where there is a deep understanding of local culture, proactive communication and a shared focus on student experience. Institutions with strong engagement in local labour markets and civic partnerships have built not only viable academic models, but also valuable social and economic bridges between the UK and Europe.

## Lessons reflected in practice

Across the 15 case studies, several themes emerge that explain why certain partnerships endure. The most successful TNE models balance strategic ambition with operational realism. They build on trust, align institutional missions and embed quality in every aspect of delivery. Financial sustainability and regulatory agility are essential foundations, but so too are cultural awareness, responsiveness to student feedback and an openness to innovate.

These lessons highlight that TNE in Europe has evolved from a transactional model into one based on **reciprocity and shared purpose**. The partnerships studied are no longer just vehicles for delivering UK degrees abroad; they are collaborative platforms for innovation, capacity-building and educational diplomacy.

## Looking ahead

The EU remains both a key opportunity and a complex operating environment for UK universities. While the aggregate data show strong growth, much of it is concentrated in a handful of countries, underscoring the importance of targeted market intelligence and nuanced engagement with local systems (Chart 7). The diversification of the European HE market – alongside emerging edtech competitors, demographic shifts and the need for more flexible lifelong learning pathways – will continue to shape TNE strategies.

Institutions that adapt their models to local conditions, invest in staff and student mobility, and cultivate equitable partnerships will be best placed to sustain and expand their presence. The evidence shows that high-quality TNE, grounded in shared academic standards and informed by reliable data, enhances employability, supports regional development and strengthens the UK's reputation for educational excellence.

This report recommends that the UK's international education strategy should recognise and support the development of TNE in the EU. It promotes UK–EU connectivity, reinforces the UK's role as a leader in flexible and relevant HE delivery, and delivers mutual benefit for students, institutions and societies on both sides. Continued investment in evidence-based planning, strategic partnerships and collaborative policy dialogue will ensure that the UK remains at the forefront of transnational HE across Europe.

## Further research

There is a need to better understand international students on UK TNE programmes in the EU. Further research is recommended into what data is available on international student mobility to the major partner countries in the EU (Germany, France, Italy, Greece, Cyprus). Can we identify the common international markets and promote this type of programme collectively?

Further research is also needed to gather data on nationality and other demographics – there are challenges in identifying the target audience for CPD, flexible and online programmes. Many established partnerships exist, but it's difficult to determine the nationality of students. There is also limited understanding of the demographics of online degree students, and there is a need to gather information on nationality to distinguish between local students, British expats and other international students.



# Appendix 1 - TNE models, awards and delivery approaches in the EU

For this study, UK transnational education (TNE) comprises UK higher education (HE) awards including degrees, diplomas, TVET, professional awards and micro-credentials delivered in EU countries, as captured in HESA Aggregate Offshore Record (AOR) data (91,000+ students in 2023/24). The models draw from the British Council/ DAAD report Transnational education: a classification framework,<sup>24</sup> adapted for European contexts, differentiating (1) autonomous, or independent, models that require no local support, (2) models that require local support, and (3) collaborative, or partnership, models. In the context of Europe, the risks present a range of different operational challenges for UK HE providers. These are specific to both the model and the particular country context in which they operate. Benefits are variously to the students, to partner HEIs or to countries.

## Common award models

These form the basis for TNE provision, grouped under collaborative provision in HESA data:

- Validation: Overseas partner designs programme; award from UK institution
- Franchise: UK institution's programme run by overseas partner, mirroring UK delivery
- Joint award: Award given jointly by two (or more) institutions
- Dual (or double) award: Awards from both UK institution and partners

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[https://www.britishcouncil.org/sites/default/files/tne\\_classification\\_framework-final.pdf](https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf)

## Core TNE models

Model of TNE	Characteristics	Risks	Benefits	Examples
<b>Autonomous</b>				
Branch campus	Physical campus by UK institution in Europe mirroring UK provision; collaborative if partner involved	High costs; regulatory compliance (e.g. post-2020 EU rules in Greece/Cyprus); cultural differences	Access to quality education; institutional reputation; local relevance	University of Lancaster Leipzig
Distance learning/online	Remote study via online resources / virtual learning environments (VLE)	Limited interaction, cheating risks, motivation issues	Flexibility, diverse resources, reduced costs	Liverpool Online
<b>Locally supported</b>				
Franchise	Local institution licenses/delivers UK programmes under UK branding	Limited UK control; QA challenges; exploitation potential	High-quality access; cultural exposure	University of the Creative Arts, Berlin School of Business and Innovation
Blended delivery	Mix of flying faculty (UK staff in intensive blocks), local tutorials, online/VLE	Coordination challenges; variable local support quality	Enhanced engagement vs. pure distance	University of London
<b>Collaborative</b>				
Joint degree	Single degree awarded jointly by UK/EU institutions	QA alignment; system compatibility; resources	Diverse resources; employability; cultural exposure	King's College London/Humboldt University Berlin PhD
Dual degree	Two degrees from UK/EU institutions, often with mobility	Resource strains; academic alignment; QA	Enhanced skills; employability; language gains	Nottingham/Tubingen University

Source: Knight, J. and J. McNamara (2017), *Transnational education: A classification framework and data collection guidelines for international programme and provider mobility*. Report for the British Council & DAAD.

## Emerging delivery models

These reflect study trends like the rise of edtech, flexible CPD and blurred boundaries in post-2020 EU markets (e.g. Greece/Germany growth):

- MOOCs: Large-scale online courses enabling multi-country participation
- Virtual mobility/online international learning: Tech-driven collaboration, virtual study abroad, cross-cultural training
- Work-integrated learning: Programmes embedding work experience for practical skills
- Personalised learning: Data/analytics-tailored programmes
- Micro/nano-credentials: Fast, on-demand, online mini-qualifications for career shifts.

These models support EU TNE adaptation to regulations, employability demands and sustainability, as seen in case studies.

# Appendix 2 - Case Studies

## Case Study Interview Invitation and Questions

Our team is currently working with the British Council to develop a number of case studies and operational insights on UK TNE delivery models in European countries. This includes: international branch campuses; joint/double degrees; online; franchising and validation; and we are particularly interested in the experiences of UK higher education institutions (HEIs) in different countries in terms of governance arrangements, sustainability and/or exit strategies, and student experience strategies. The British Council is keen to develop case studies that share lessons of good operational practice.

### Background

What are your motivations for running the programme? Have these changed over time?

What are your future strategic plans for the programme?

### Governance

Do you have a commercial partner? If so, what is the nature of the relationship with them? (ask about financial arrangement?)

Do you have a relationship with a pathway provider? How has/is that evolving? (ask about financial arrangement?)

What are the main governance challenges (current/future)?

### Sustainability

To what extent did the UK's withdrawal from the European Union (EU) impact on your operations? How did you survive/adapt?

Is your programme a significant articulation route to study in UK?

Are there future policy changes (in the host country) that will impact on your operations? How do you plan to manage these?

To what extent is engagement with local government and other civic stakeholders important in sustaining the programme? How do you manage these?

What impact does your programme have on local stakeholders? To what extent do you think it influences their attitude towards the UK?

(If planning to exit) – What is your institution's exit strategy? How will that be managed?

### Student experience

To what extent is student experience a success factor in the programme?

What research did you do with local students prior to establishing the programme?

Do you collect data on employability of your graduates?

How do you capture student/graduate outcomes?

To what extent is your relationship with local employers a success factor? How is that managed?

## Case Studies List

Higher Education Institution (HEI)	Country of Delivery	TNE Model	Size and Level
University of London in Paris	France	Campus/centre	250 students
Queen Mary London	France	Autonomous – use University of London Institute in Paris (ULIP) premises	40 students LLM (1 course)
CITY College, University of York	Greece	Validation and franchise	400 students undergraduate, master's, PhD
Queen Margaret University	Greece	Validation	3,500 students undergraduate
Kings College London	Germany	Dual degree	200 + students (22/23) undergraduate, master's, PhD
Lancaster University Leipzig	Germany	Branch campus	550 students undergraduate, postgraduate
University of Nottingham	Germany	Dual degree	master's
University of the Creative Arts	Germany	Validation	4,000+ students in Berlin and Hamburg undergraduate, master's

London South Bank University	Germany	Validation Online delivery by partner	200+ students master's
University of East London	Greece	Validation	5,000+ students undergraduate, master's
University of East London	Germany	Dual award/online	Just under 100 students across 2 partnerships in Germany master's
London Metropolitan University	Ireland	Validation	129 students undergraduate
Kings College London	Italy	Dual degree	Under 100 students (2022/23) master's
University Of London Online	Worldwide	Online Regional teaching centres Germany, France, Portugal, Malta	5,000 students in Europe master's, some undergraduate
University of Liverpool Online	Worldwide	Online	22,000 students (204 countries) 260 from EU master's

# Case Studies in Full

## University of East London and Metropolitan College, Greece

### Background

Since 2011, the University of East London (UEL) and Metropolitan College (MC) have built one of Europe's most successful transnational education (TNE) partnerships. Today, it stands as the largest UK-led TNE provision in Europe, with more than 5,000 enrolled students, a portfolio of over 50 degree courses and a network of eight campuses across Greece.

Students can study UEL degrees locally at MC sites in Athens, Maroussi, Piraeus, Thessaloniki, Heraklion (Crete), Larissa, Rhodes and Patras. The courses span a wide range of high-demand fields, from biomedical science, civil engineering and psychology to artificial intelligence, data science and performing arts. Delivered in both English and Greek, these degrees provide internationally recognised qualifications that are professionally accredited and locally relevant.

### Governance

At the heart of this partnership is a Strategic Memorandum of Agreement that commits both institutions to collaborative delivery, academic innovation, joint marketing and high-impact research. Academic governance is shared through joint boards, with UEL maintaining oversight to ensure UK standards, while MC handles local operations and student support.

Together, UEL and MC have pioneered scalable, high-quality transnational delivery in a highly regulated context. What began as a small number of courses has grown into a dynamic academic ecosystem that reflects shifting global and local priorities. The partnership now offers degrees in emerging and strategically important areas such as fintech, maritime management, cybersecurity and educational leadership.

### Student experience

This growth has been matched by strong student outcomes. Graduate employability consistently exceeds 90 per cent within six months, and student satisfaction rates remain above 85 per cent. Alumni from UEL-MC courses now occupy leadership roles across industries in Greece and internationally, a testament to the relevance and rigour of the education they've received.

The student body is primarily Greek but increasingly includes learners from the wider Balkan region and beyond. Students are drawn by the opportunity to earn a UK degree without leaving home, supported by the reputation of UEL and MC, the affordability of the local model and robust professional pathways. Financial barriers are addressed through scholarships, including UEL's Global Campus Scholarship. Experienced support teams help students navigate administrative processes, ensuring access and success.

### **Operating in Greece**

Operating in Greece presents both opportunity and complexity. The demand for UK degrees is strong, and Greece's regulatory environment recognises the value of international partnerships. Yet bureaucratic processes and policy changes require local expertise, which the partnership has cultivated through sustained engagement with national authorities and investment in legal and academic infrastructure.

MC's geographic footprint enables regional equity in access to higher education (HE), serving students far beyond the capital. This distributed model, combined with UEL's academic leadership, has made the partnership a national reference point for quality-assured, UK-accredited education in Greece.

### **Sustainability**

Looking ahead, the partnership is entering an exciting new phase with plans underway to develop a UEL International Branch Campus (IBC) in Greece. This initiative represents a deepening of the relationship between UEL and MC, and a strategic expansion of UEL's international presence. While the specific academic offer is still being developed, the IBC is intended to serve as a hub for innovation, knowledge exchange and cross-border collaboration. It will provide enhanced opportunities for staff and student mobility, foster joint research initiatives and support the long-term sustainability of the partnership within the region.

### **Lessons learned**

For other UK HEIs considering TNE in Greece, this partnership demonstrates what's possible with the right blend of academic integrity, operational excellence and mutual commitment. The success of UEL and MC shows that transnational education can be both scalable and deeply impactful when rooted in shared goals and responsive to student needs.



## University of London Institute in Paris

### Background

The University of London Institute in Paris (ULIP) was the brainchild of Miss Edith Williams, who went to the Sorbonne to train as a teacher of English. She was the second-ever woman to receive the agrégation d'anglais (a qualification necessary for teaching at university level) and held weekly English classes in her flat. In 1894, thanks to the support of the British ambassador and the French government, she formed the Franco-British Guild.

In the aftermath of the First World War, the Guild was reorganised to become the British Institute in Paris, the first British institute in continental Europe that offered both French and English courses. At that time, it was an integral part of the Université de Paris and was also supported by a consortium of British universities, including the University of London. A library and a clubroom were added, and leading French and British intellectuals and academics were invited to lecture. The Institute's work continued during German occupation of France.

The Institute was incorporated into the University of London in 1969 and sits alongside the School of Advanced Study as a central institute of the university. In 1976, the Institute moved into larger premises overlooking the Esplanade des Invalides, thanks to a grant from the Rayne Foundation, sharing the building with the British Council. Its name was changed to the University of London Institute in Paris in 2005.

### About the programmes

In 2019, 96 per cent of ULIP students were British because the university was offering its programmes to A-level graduates, similar to a liberal arts programme taught in French. Students in Paris must function completely in French and study a broad curriculum including history, politics and economics.

In 2019, ULIP added an interdisciplinary international politics programme taught in English, which attracted both UK and international students; the numbers of international students studying at ULIP grew, comprising around 20 per cent of the politics cohort. Today ULIP delivers international politics, the French studies undergraduate programme and a small number of programmes in urban studies, while Queen Mary University of London offers a postgraduate commercial law programme (LLM) at the site. There are approximately 250 students in total.

### Sustainability

As a foreign institution, ULIP is registered as a private education institution in France. Publicity materials now state that ULIP is a private HEI, not recognised by the French government. Equivalency of qualifications works through the Bologna agreements, and as students tend to be British or international, a French recognised qualification is not necessary.

## Effects of leaving the EU

Brexit made life more complicated for students and visiting staff. Students are now required to get a student visa and do not automatically qualify for the right to work after their three-year undergraduate degree in France. The only way to stay and work in France is to be employed and obtain an employer-sponsored visa, which isn't straightforward. However, ULIP students, most of whom are bilingual, can register for a postgraduate programme in France and apply for citizenship or residency after two years.

All permanent staff at ULIP are employed on French contracts under French employment law. Visiting teaching faculty also need a visa.

## Students

Students apply to ULIP to study for a UK degree in the heart of Paris. They typically spend three years at the institute for an undergraduate degree, or one or two years in a postgraduate programme.

ULIP's international fees are relatively low, which is more than European students would have paid pre-Brexit, but less than international students pay in the UK.

ULIP is part of the National Student Survey (NSS) and therefore all student information is public. There is a unique identifier.

There has been significant growth in the last ten years. In 2015 numbers had fallen to 80 or 90 students, whereas today there are approximately 250.

## Operating in France

ULIP is in the unique position of being a central academic body of the University of London and a standalone institute. Its financial sustainability is uncertain, but the University of London is committed to the Institute, which provides stability. ULIP has been growing for six years, so income has been increasing, but unfortunately, costs have also increased since Brexit.

## Lessons learned

ULIP is a very rich educational environment to work in. There are over 200 undergraduate students who will have a life-changing experience of spending three years in a global capital.

Starting with the campus model may not be a financially sustainable option for HEIs without ULIP's unique history and position as a central institution of the University of London. The focus could instead be elsewhere: building links with European HEIs, which is a strong point of UK campus universities, or unique offerings for students.

# CITY College, University of York Europe Campus

## Introduction

For more than 35 years, CITY College, University of York Europe Campus has connected the UK with the entire south-east Europe (SEE) region. Since its establishment, CITY College's engagements and activities have spread far beyond SEE as it has worked to build capacity and create an inclusive international community that contributes to the public good. An application has been made for CITY College, University of York Europe Campus to obtain university legal entity status in Greece under the newly legislated HE reforms.

## Background

CITY College was initially established in the aftermath of the Cold War, which marked the end of central planning across the economies of Eastern Europe. Many universities in the region began adapting their courses to reflect the needs of the new market reality, but CITY College was uniquely positioned to fill this gap and serve the needs of students in Greece and the wider SEE by bringing UK HE to the region.

CITY College delivers a unique model of long-term Russell group university collaboration to support teaching and research activities and extensive engagement with other regional and European university partners. The taught programme portfolio currently covers business administration, computer science, humanities and psychology. A doctoral programme was established in 2004 within CITY's South-East European Research Centre. There are currently around 20 students undertaking doctoral study and contributing to CITY's strategy of producing research in and for the region. A new law school is due to start delivery of programmes in 2025.

## Thessaloniki's strategic location

CITY College sits in a strategic geolocation in the Balkans close to what was, until 1989, the 'Iron Curtain'. Initially the partnership was with the University of Sheffield and, through its teaching and research activities, it played a part in supporting countries going through EU accession in the early 2000s and connecting previously isolated academic institutions with western Europe and the wider academic community.

## International education initiatives

CITY College supports the University of York's international education ambitions, emphasising the expertise and knowledge it offers through delivering high-quality teaching and research and support for development and capacity-building across SEE and beyond. Only a third of the students at CITY College are Greek nationals, and CITY's own TNE activity supports student learning in six other locations (Athens, Baku, Belgrade, Bucharest, Sofia and Yerevan). Partnerships with the Romanian American University and New Bulgarian University bring significant benefits to all parties, including opportunities for staff to engage in research networks and academic collaboration.

Widening student participation is at the heart of the CITY College's mission. The recruitment process relies on country managers and personal meetings with prospective students, allowing for a more holistic evaluation of applications. The partnerships with universities in Bulgaria and Romania enable students to study in their home countries and graduate with double degrees. CITY College plans to triple student numbers in the next five years while maintaining its personalised approach, particularly important in the Balkans, where face-to-face relationships and family recommendations are crucial.

### **Executive MBA programme**

The Executive MBA programme is CITY College's flagship programme, which plays a key role in amplifying its footprint in different countries. Initially delivered in Thessaloniki, it has since expanded to other locations across SEE and the Caucasus and currently has almost 400 registered students. This AMBA-accredited course is another dual-award programme, leading to qualifications from the universities of York and Strasbourg. The programme is delivered over weekends in each of the different locations, with students also required to attend study weeks in Thessaloniki, York and Strasbourg, providing strong networking opportunities for students.

### **Quality assurance and the student voice**

CITY's QA strategy seeks to achieve high-quality standards across all aspects of provision and the continuous enhancement of teaching and research benchmarked against: the standards of the University of York; UK quality standards (OfS, QAA, British Accreditation Council (BAC)); Professional, Statutory, and Regulatory Bodies' (PSRB) requirements (BCS / The Chartered Institute for IT, British Psychological Society, Association of MBAs etc.); ENQA standards in the European HE Area (ESG, etc.); and national standards for QA set by the Hellenic Authority for Higher Education.

The student voice is integral to the QA and enhancement of learning and teaching at all levels, and CITY is committed to student participation in the oversight, regulation and improvement of learning and teaching. This is facilitated through the allocation of personal tutors, the student-staff forum, student union, student evaluation questionnaires and student participation in the NSS.

# King's College London and Humboldt University

## Background

King's College London and Humboldt University in Berlin have been collaborating for over 30 years. The partnership started with academic links in the field of law, which catalysed discussions on the development of a dual degree programme, the dual LLB in English Law and German Law.

## About the programme

This programme provides a bilingual, bijuridical education highly valued by employers, and it has been very successful in terms of student enrolment, feedback and career outcomes. Students can choose between a variety of pathways for both their undergraduate and master's studies.

The support of a German academic lecturer, funded by the German Academic Exchange Service (DAAD), who provides students with a foundation in legal German before transitioning to Humboldt University, has been critical for the success of the programme. Integration of administrative processes and strong support for students by both institutions are also essential components of the dual programme. From this strong start, and also due to additional support from the DAAD for the funding of academic workshops in German studies, both universities developed a joint PhD programme in humanities. This was later expanded to include other academic fields such as geography, law and mathematics, and there are plans for further expansion of the joint PhD programmes.

## Governance

A Joint Academic Committee oversees candidate selection and administrative processes; additionally, King's offers a competitive scholarship for students pursuing joint PhD programmes with international partners, including Humboldt; this allows for a bidirectional flow of PhDs between King's and Humboldt. There is also additional seed funding, provided by both institutions, for academic mobility and regular workshops. Both institutions are major destinations for study-abroad programmes, and the collaboration in law has led to the launch of the European Law School Network to develop a European Lawyer Programme.

## European Law School Network

This network has now expanded to include several European universities from eight countries. Students receive specialised training leading to three recognised professional qualifications over ten semesters. The programme includes three years of study in the home country followed by one year in two partner institutions for specialisation. The deep and multi-faceted institutional partnership led to the involvement of both universities in the Circle U. European alliance of universities. This is developing further opportunities in education and research for the alliance partners, with a focus on the themes of democracy, climate, global health and AI.

**‘Dialogues in Disability’**

An innovative programme, ‘Dialogues in Disability’, was launched by Humboldt and King’s, and other international partners in Latin America and India, to develop recommendations regarding inclusion and better support for students with disabilities. This partnership remains an institutional priority for both universities, and future plans include the development of more grant applications and additional educational opportunities for students.

## King's College London and Luiss – Libera Università Internazionale degli Studi Sociali, Italy

### Background

Luiss and King's have institutional complementarities in several thematic areas as well as an alignment of values and ambitions, especially regarding internationalisation of programmes. Both institutions already had a track record of developing innovative collaborative programmes to enhance the offer to students, as well as processes and staff capabilities to develop programmes, and as a private university Luiss is very agile and innovative in its approach to programmes. All these factors created a natural affinity that facilitated institutional buy-in for the partnership. Dual degree programmes were developed in 2019 in European studies and law; these themes were chosen because the dual offer could clearly add value to students and employers.

### Educational programmes

In law, the LLM educational programme is an opportunity for students from Luiss to acquire a solid, in-depth preparation across key legal disciplines by spending their fifth year of study at King's. Equally, King's students have the opportunity to enrol in one of the Luiss LLM programmes in EU law and policies.

The double master's in Policies and Governance in Europe provides students with an in-depth understanding of major political and economic developments in Europe, and in-depth knowledge of the policies and political economy of the EU and European states, addressed from an interdisciplinary perspective combining political sciences, law and economics. The programme is taught in English in both years. Students have the opportunity to gain practical experience through internships in a diverse range of institutions in both countries, including government, NGOs, regulatory bodies and others. Students may begin the programme either at King's and then spend the second year at Luiss, or at Luiss, and then spend the second year at King's.

Both programmes in law and social sciences leverage the opportunities that being located in capital cities in Europe can offer to students. Other activities within the partnership have included student semester exchanges, an online language lab that pairs students and staff in a series of weekly conversations, and a tripartite executive training programme in European public policy and management that takes place across three European capital cities: Rome, Berlin and London.

There are also opportunities in business programmes that are being evaluated. The programmes are overseen by academic and administrative teams located both in faculty and centrally at both institutions, with frequent academic and staff visits, as well as a joint steering committee to evaluate the academic performance of students and the overall performance of the programmes.

**Student experience**

Both programmes currently recruit mostly European students, but there is potential to increase the diversity of the student cohorts. The partnership is multi-faceted and underpinned by strong academic support, both in education and joint research. Equally important, the programmes have good outcomes for graduate employability, and as the already active network of alumni grows, as well as awareness about the programmes and their successful graduate outcomes, the number of students enrolled will continue to grow steadily. Both institutions are currently in discussions to develop new joint programmes.



## London Metropolitan validation with Portobello Institute in Ireland

### Introduction

Portobello Institute was established in 1981 in Dublin, Ireland, primarily to professionalise nursery workers. Today it has a student population of 2,500 studying across full-time, part-time and blended-learning programmes. Programmes are delivered in early childhood care and education; fashion buying and management; facilities management; sports; health; and aviation, travel and tourism. For more than ten years, Portobello Institute has worked closely with London Metropolitan University to offer several undergraduate and postgraduate programmes. There are currently 129 full-time enrolments across a range of programmes validated by London Met.

### Governance

A conventional validation structure is followed; courses are created and taught by Portobello, while London Met provides the validation: 'Our university possesses the necessary expertise to offer courses in early childhood education and sports.'

Approval is granted for a duration of three years, after which it is extended to five years, meaning the courses will run for five years before they are assessed again.



'They propose courses that are well-suited to their market, and we respond, indicating our capability to support those courses. The process for validation events remains consistent, whether for validation or franchise courses, adhering to the same quality standards. The distinction lies in the fact that they design the specifications, modules and course using our templates. Subsequently, we agree to allow them to conduct it, and we grant our degrees.'

The financial model is on a 'charged per student' basis.

## **Sustainability**

The current reality in the UK is that revenue is required from these partnerships, so growth is always pursued, including considering new programmes. The relationship with Portobello is strong, having been established since 2013. Any new programme suggestions are evaluated, especially because of the significant effort of investment, and it must be ensured that the partner has total confidence in their ability to attract students. Because of the financial position of HEIs in the UK, and the lack of international students, expanding TNE is being considered.

## **Operating in Ireland**

The impact of the UK leaving the EU has been less severe in Ireland due to the special connection between the two countries: it has been viewed as an opportunity to attract more international students. However, this has not fully succeeded. Being an English-speaking nation is seen by Portobello as a means of expansion, and since it lacks degree-awarding authority, it collaborates with London Met and another UK university, in an effort to increase its student intake. There is potential and a definite opportunity to expand; there hasn't been any significant regulations or barriers to developing the TNE programmes nor any problem with recognition.

A new programme is starting with a college in Dunboyne, but it is only at a very early stage. Interestingly, a new model has been introduced, whereby students can apply to the Irish educational authority for a grant to be able to study on the courses.

## **Students**

In anticipation of the new requirements from HESA, all TNE students have individual records. There is not a large number of international students.

Progression to the UK is low: these courses are not provided consistently in London, but it is possible. These are London Met courses delivered by their partners, so students can transition seamlessly in their final year if desired.



## University of London online delivery in the EU

### Background

Despite extensive capacity and a dizzying array of tertiary-level study options and international study pathways throughout the EU, the University of London (UoL) maintains a diffuse and diverse profile that is characteristic of scaled programmes of online and distance education, with around 5,000 students across the EU and over 4,000 in neighbouring associated and third countries, the UK included.

The majority of these students study independently and online, and they are typically older than UoL's global average (and more likely female), with 46 per cent aged 30 and over compared to a global proportion of 25 per cent. Thus, UoL's profile leans more towards CPD and lifelong learning, upskilling and reskilling. In spite of this, only 39 per cent of the student body is postgraduate, with growth concentrated around newer online undergraduate programmes such as computer science and psychology. The proportion of undergraduates studying via the more recent fully online programmes has increased from 15 per cent to 41 per cent in five years, while numbers on the longer-established programmes, including those supported by UoL recognised teaching centres (RTCs), such as law and economics, have fallen from 84 per cent to 58 per cent.

### The benefits of the model

A broad regional appreciation for the benefits of conventional distance education is evidenced by the relatively low number of students choosing to attend an RTC for support with their studies. The blended and hybrid provision afforded by RTCs was chosen by only 10 per cent of undergraduates in the region (set against a global average approaching 70 per cent for undergraduates). Of the c.300 EU-domiciled students attending an RTC, 18 per cent travel outside the EU, to RTCs as far afield as Singapore, Uruguay, the UAE and beyond. Considerable retrenchment has taken place in the volume and distribution of RTCs operating in the EU, but centres remain in Germany, France, Portugal and Malta. The UoL's longstanding RTC model still provides a relevant and versatile platform for collaboration where long-term sustainability, relevance and added value remain the focus.

UoL programmes have been taught in Malta by Saint Martin's Institute of Higher Education, a prominent tertiary provider of quality education in computing and commerce, since 2000. The partnership with the University of Passau is a further longstanding example, providing pathways to a dual qualification in law.

## Partnership

In addressing the broader EU market, the more recent partnership with Forward College since 2021 exemplifies dynamic leadership driving innovation, adaptability and access, with the founders' explicit aim to 'reconcile academic tradition for excellence with innovation for relevance'. Forward College combines international rotation across three campuses, co-living experiences, personalised and active learning, personal development programmes and digital skills development.

UoL students at Forward College experience a European expedition: year 1 in Lisbon, year 2 in Paris and year 3 in Berlin. Students benefit from small-group teaching and one-to-one tutoring by London School of Economics and Kings College London-approved faculty, alongside an entrepreneurship programme that complements academic studies with real-life projects. This partnership offers a unique proposition around skills development, living learning communities and international study for students on UoL BSc degrees in psychology, economics, management, finance and the social sciences.

This experience indicates that the future for online and distance education providers in the EU remains bright, but blended 'light touch' approaches that use global programmes of online, distance and flexible learning always require careful calibration in local regulatory contexts. Focused collaborations also play a critical role in the sustainability of longer-term engagement, but in both cases, considerations of value and quality remain the ultimate determinants of relevance.



## Lancaster University Leipzig

### Background

Lancaster University Leipzig (LUL)'s first intake of seven students was in January 2020. 550 students study a range of IT-related and business courses, the majority (approximately 70 per cent) at undergraduate level and the remainder at postgraduate level. Approximately 10 per cent of students progress from undergraduate to postgraduate programmes, and 95 per cent of students are international, coming from 90 countries. China represents less than 20 per cent of student numbers, while Egypt and Turkey are well represented with growing numbers. LUL employs 70 members of staff from 34 different nationalities.

### The Lancaster–Navitas partnership

LUL was established as a partnership between Lancaster University and Navitas. Contractually, Navitas is responsible for premises and professional services, including student recruitment and agent management, while Lancaster is responsible for all academic matters, including staff and programmes. Lancaster emphasises the importance of aligning values, ambitions and intentions between the partners to create shared value, rather than focusing solely on the contractual operational responsibilities.

TNE partnerships, including LUL, are seen by Lancaster as long-term ventures, with plans to expand from teaching to include research and engagement activities. The approach focuses on building long-term partnerships and international relevance, which is significantly different from franchising a course. Currently, over one-third of Lancaster's students are studying outside the UK through TNE partnerships, and it is expected this will grow to half in the future. The importance of articulating the wider benefits of TNE beyond financial considerations, highlighting the value of global connectivity for the university, its staff and students is emphasised.

### The importance of place

Place is a major strategic and operational consideration. Lancaster aims to develop place-based, locally relevant curricula delivered by local staff while maintaining alignment with the university's overall strategy. The university is committed to research-led teaching so that LUL academic staff are recruited as both researchers and teachers. Their research will often be place-centred, which affects curriculum development, adding value to the programmes they teach. Lancaster highlights the importance of empowering faculty to adapt their teaching to local circumstances and recognises that this will have operational implications. The devolution of exam-setting is one example of a key operational change.

Location was an important factor in Lancaster's choice of Leipzig for its campus. The city has an active business community and global ambitions to attract international businesses. LUL benefits from local industry contacts and incoming international businesses, as well as the growing networking opportunities these provide, and connections are easier to make than they would be in a larger city. LUL sponsors local events, attends careers fairs and secures internships and work placements for students with local companies. Around 40 per cent of students stay to work in Germany after graduation.

One important factor is that LUL has a niche position in Leipzig and is not in direct competition with local universities.

### **Students and staff considerations**

Recruiting international students has presented unique challenges. The international recruitment net is very wide, requiring the Navitas team to sign up a large number of new agents. Finding the right agents is a challenge, as Germany is not traditionally associated with agent-based recruitment; most agents have no experience of recruiting students to the country. Significant effort has been invested in training agents about German visa regulations and how to promote Germany and Leipzig as study destinations. Over the past five years, Germany has become more agent-focused (partly due to increased recruitment efforts by private providers and global university systems), so competition for students is increasing.

Student support is essential. LUL emphasises the importance of students understanding the local culture, pointing to the need for cultural awareness training and the importance of creating networks to support students and providing cultural intermediaries. It is absolutely essential for students to learn German, as although they study in English they are living and, for many, ultimately working in Germany. Taking advantage of work-placement opportunities as part of their academic course is largely dependent on their German language skills.

Student experience and outcomes are tracked in the same way as at Lancaster, and alumni connections are also valuable here. Student demand is important in shaping LUL programmes; for example, this has led to a shift in focus from business to IT with a growth in IT-related programmes.

Lancaster emphasises the value of global connectivity for all its students. LUL is not viewed as a pipeline into UK study but is seen to contribute to that global connectivity. Each year, 20 of LUL's best students are given the opportunity to undertake a year's study-abroad programme at Lancaster. Demand for this outstrips supply and there are plans to increase the number of places. Study-abroad at LUL is more problematic for Lancaster's UK students, mainly because obtaining a student visa requires them to place €11,500 in a blocked bank account. LUL and the British Chamber of Commerce are currently lobbying the German authorities to change this. Lancaster, however, believes that having overseas students on campus benefits home students who can't directly participate in overseas programmes.

Academics are recruited globally and require support to navigate the practicalities of living and working in Germany, and to understand the culture, including academic differences. An example of the latter is how marking varies; a mark of 70 is good in the UK system, and it was necessary for LUL staff training to address this. The benefits of finding local professional staff with a connection to the UK were highlighted by LUL, because they understand both the German and UK systems. A staff handbook has been created to help support staff.

### **Lessons learned**

Lancaster approaches its presence in Leipzig from the perspective of creating opportunities for both countries. It is important to think about what benefits LUL brings to the locality and to be able to articulate and deliver these.

# Nottingham and Tübingen University Germany dual degree

## Introduction

This dual master's degree programme was launched quite a few years ago between Nottingham and Tübingen University in Germany, mainly with their school of business and economics team. The school in Nottingham is a business school and school of economics, with a number of master's degree programmes.

## About the programme

Students study at Nottingham for the first two semesters and then transfer to Tübingen to complete the second year of their master's degree. Upon completion, students will get two master's degrees, and the final dissertation will be jointly supervised between the Nottingham and Tübingen teams. Both universities work together to recruit students.

Both Tübingen's and Nottingham's entry requirements must be met by students, and the selection process and interviews are done jointly. The main population of students are from Germany, although there has been potential interest from international students in recent years.

## Students

Some students stay on to do their PhD after they complete their master's degree at both universities. There are also some students who start at Nottingham and decide to join the dual degree programme.

## Effects of leaving the EU

Student fees are the main challenge, and DAAD funding can potentially support students to benefit from this programme.

The programme was set up before Brexit, which has significantly altered many TNE programmes across Europe. Before BREXIT, a pro rata fee was offered for students, who paid the home fee (for German students) and could access UK student loans, which the students and university found manageable.

However, after Brexit there has been significant challenges with funding, and even the two-thirds fee is not easily affordable, although individual students are still joining the programme and paying the international fee. The student recruitment situation is hugely challenging, and some scholarships have been launched to cover fee arrangements. However, the interest of German students, who the programme was originally designed for, has significantly declined, and the number of international students is very small – just one or two students per year at the moment – because it hasn't been widely promoted.

Looking forward, it is hoped that DAAD funding will support German students. Five years after Brexit, the EU countries and students and their families are gradually accepting the UK fee is higher – the market perception is gradually changing.

## **Governance**

Research collaborations have been launched between the two universities and there is an annual research symposium. Tübingen has become a strategic partner beyond just the teaching partnership and TNE arrangement.

The Global Engagement Strategic support unit has a colleague who looks after the elements of the partnership beyond the dual master's degrees. For all the TNE partnerships, how the relationship can be maximised, rather than just the teaching elements, is always considered. For example, is there anything on mobility or research that could be expanded to have a more enhanced collaboration? This allows these relationships to develop into a more comprehensive partnership.

## **Operation in Germany**

Programmes between UK and European universities are attracting international students, and for some international students Germany and the UK are very popular markets. International students can thus benefit from the academic experience of both countries, adding value to their overall employability and career development.

There have been some challenges on the admission process because of changes post-Brexit. Students now need to apply for a student visa and then provide an English language certificate.

## **Student outcomes**

The alumni team has a database to track all students, but there is not 100 per cent feedback. However, because of the close relationship between academics and the students and partner, this particular group of students has a very high response rate, which allows student outcomes to be tracked.

## **Lessons learned**

- Post-Brexit, collaboration such as this one between the UK and other European universities with TNE programmes could be popular for international students from outside the EU, because Germany, France and countries such as Italy are attracting more and more international students. Collectively, this can be promoted as a benefit for students to be global citizens and have their academic experience in a different part of the world, but it is not being promoted well enough. Attracting more international students will bring additional sustainability potentials into the TNE programme.
- In setting up TNE partnership, the first question is, what is to be achieved from this programme and from each party? What does the partner want? Do these needs align?
- A core team to work together is essential to keep the programme running and develop an ecosystem to support the students.
- Exercise due diligence: academic mapping must be done and QA must be in place across the academic operation, including regular visits and reviews. Improvements can be made at both senior strategic and operational levels to ensure consistent communication and messaging and avoid confusion.

# Queen Margaret University and Metropolitan College, Greece

## Introduction

The partnership between Queen Margaret University (QMU) and Metropolitan College (MC) dates back to 2001. Initially a single undergraduate programme, the partnership has grown to include 12 undergraduate programmes accounting for over 3,500 collaborative students across eight delivery sites in 2024–25. All programmes are considered to be QMU-validated provision, but there are plans to expand the offer to also include franchise delivery.

## About the partnership

Designed to meet local market needs, the programmes are delivered and assessed in the local language by MC,<sup>25</sup> which bears the delegated responsibility for student support. QMU quality processes apply to these collaborative programmes exactly as for those programmes delivered in Edinburgh.

First marking and internal moderation across eight delivery sites is conducted by MC. Initially, QMU bilingual academic staff members moderated a sample of all summative assessments. This process enabled QMU to be sure that marking was fair and reliable. Over the years the partners engaged in constructive dialogue about how to interpret QMU marking requirements, and a shared understanding was developed. Using an evidence-based approach informed by ongoing quality assurance processes, QMU was assured that this responsibility could be partially delegated to MC (with different arrangements in place for different programmes). All SCQF 9 and 10 modules are moderated by bilingual external examiners on an ongoing basis.

QMU's institutional approach to partnership working is based on capacity-building (through formal and informal support and CPD opportunities), awareness of the local context and respect of the institutional autonomy of the partner institution.<sup>26</sup> Systems and processes have evolved over the years to fit both institutions, achieving a shared understanding of academic standards and ongoing enhancement.

Delivery across multiple sites is the biggest challenge and is jointly navigated. MC ensures consistency and parity in learning, teaching and assessment across delivery sites and QMU maintains quality oversight – including biannual monitoring of student achievement and ensuring the student voice is heard across all delivery sites. Building on the successful response to operational challenges during the pandemic,<sup>27</sup> engagement of partner staff across delivery sites is facilitated by QMU via hybrid or fully online meetings.

QMU has a dedicated administrative team for collaborative programmes and a partnerships team within governance and quality enhancement that provide support for quality processes. Each programme has a named collaborative academic lead

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25 For more about the added value and challenges of managing the delivery of a suite of programmes in a language other than English, and the measures put in place to achieve this see [QAA publishes new suite of TNE reports](#).

26 [https://www.qaa.ac.uk/scotland/news-events/blog/quality-enhancement-through-collaboration-trust-and-empowerment-\(a-celebration-of-the-scottish-approach\)](https://www.qaa.ac.uk/scotland/news-events/blog/quality-enhancement-through-collaboration-trust-and-empowerment-(a-celebration-of-the-scottish-approach))

27 See relevant case study <https://onlinelibrary.wiley.com/doi/10.1111/hequ.12390>. p. 358

(CAL) and this role is fundamental to the success of the partnership.<sup>28</sup> QMU CALs have developed very strong relationships with MC programme leaders and academic links, based on a mutual respect and the desire to improve quality and standards.

Academic decision-making is separated from strategic decision-making by QMU. Discussions around the Memorandum of Agreement and financial arrangements are handled by the senior leadership team with support from the partnership development manager.

### **Sustainability**

MC has strengthened core aspects of operational efficiency and strategic direction to facilitate significant growth. Establishing fundamentals – such as internal quality systems, effective student representation, proper oversight of placements and solid student record systems – facilitated focusing on a scalable model and expanding in a sustainable way. Both institutions have developed a shared approach to building and sustaining an equitable partnership.

Developments regarding the local educational system and the new legislation that passed in March 2024 that allows the establishment and operation of IBCs are being monitored by QMU, and opportunities that may arise through this legislation are being explored by both partners.

### **Students**

The vast majority of students are Greek high-school leavers who are attracted to the programmes because of the reputational value of MC, the added value of a UK degree and because of the extremely challenging, less accessible admission process to state universities.

The partner has robust and inclusive student support services to address relevant challenges.

The university aims to offer an equitable student experience, as realistically these programmes do not offer the same immersive experience as studying in Scotland. The QMU Student Experience Strategy was refreshed in 2021 with inclusivity as one of the key principles; the institutional approach and mindset was shifted from 'students at QMU' to 'all QMU students'. A Greek Partnership Organisation Student Survey (similar to the NSS survey) is conducted annually to measure all aspects of the student experience. Results are presented and discussed internally and with MC in a transparent way.

Students' transition to the UKHE system at the point of entry to the programmes can be challenging. QMU has compiled a list of asynchronous resources, activities and exercises that can be contextualised by MC colleagues to meet students' needs, and a non-credit-bearing study skills module to support students' transition into the UKHE system. This is complemented by online synchronous induction sessions to QMU library resources.

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28 QMU was the only Scottish HEI that has contributed to the relevant QAA thematic insights series [New report considers link tutors in TNE](#)

Student successes are promoted by both institutions and celebrated in a mutually beneficial way. A QMU Prize is awarded every year in the form of a certificate for the best-achieving student for each programme across campuses, and student stories are published on the QMU website.<sup>29</sup>

### Operating in Greece

The challenges relate to the lack of clarity around Greek Ministry of Education guidelines, processes and legal framework, including the lack of information available in the public domain in English. Particular issues have arisen regarding the recognition of qualifications, professional registration and eligibility to practise for health-aligned programmes in the post-Brexit era. These are addressed by working closely with the partner, the British Council, UUKi and our bilingual members of academic staff with a deep knowledge and understanding of the local and cultural context.

### Lessons learned

- Invest in a dedicated TNE team and develop relevant academic roles, if necessary.
- Relationship building is important but must be underpinned by strong quality mechanisms.
- Be clear about obligations and operational responsibilities and keep communication channels open.
- Help the partner to understand and work positively with the benchmarks, frameworks and regulations that inform and govern the programmes.

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29 Indicative examples: Christina Papanastasiou | QMU Case Study | Queen Margaret University, Edinburgh, Nikolaos Kotzamanis | QMU Case Study | Queen Margaret University, Edinburgh, <https://www.qmu.ac.uk/study-here/student-stories/konstantinos-peppas-ba-hons-business-management/>, <https://www.qmu.ac.uk/study-here/student-stories/theodosia-papougiannaki-ba-hons-marketing-management/>, <https://www.qmu.ac.uk/study-here/student-stories/antonis-kleanthous-bsc-hons-economics-for-business/>

# Queen Mary University London Centre for Commercial Law Studies in Paris

## Introduction

The University of London Institute in Paris (ULIP) was incorporated into the University of London in 1969 and is a central institute of the university. Its mission is to promote the study of the British culture, language and literature of France. In 2004, a ULIP consortium was formed involving Queen Mary, Royal Holloway and the University of London to develop research and teaching in French studies at ULIP and thus to support the future academic and financial success of French studies at all three institutions. Queen Mary (QMUL) chose to join the consortium in recognition of the strategic importance of French studies (in the broadest sense) to research and teaching within humanities and social sciences. Since then, extensive work has been undertaken to address the strategic importance of ULIP, and, specifically, the ULIP Strategy and Business Plan 2011–14 recognised the need to expand the range of academic activities that take place at ULIP to ensure that both human and physical resources of the Institute were used in the most efficient way possible. At the same time, that was a period of great growth and expansion of the School of Law, and particularly the Centre of Commercial Law Studies (CCLS) at QMUL. Offering a Master of Laws in Paris was a natural development. CCLS introduced the programme in September 2012, with the strategy of reaching a highly skilled and well-educated group of practitioners, and law graduates, that want to develop expertise in a niche area but do not have the time to study full time in London. Building upon the success of the existing School of Law London-based LLM programme, the LLM Paris offers students the opportunity to develop academic and professional expertise in specialised areas of commercial law, including: international dispute resolution; banking and finance; intellectual property; technology; media and telecommunications; and international business and commercial law. The programme is offered in full-time (one year) or part-time (over two years) modes, with a start date in either September or January.

The academic staff and course content are largely similar to the LLM programme offered by QMUL in London, but the structure differs to better suit a different group of students. One of the distinctive features of the LLM Paris is the wide range of elective modules offered and the flexible structure designed to enable students with work or study commitments to complete the programme without having to interrupt their professional career. Specifically, modules are usually taught over intensive daytime blocks, or evening classes, with occasional Saturdays. The intensive classroom time allows students a more flexible timetable and to retain or undertake commitments outside LLM study.

## Governance

As mentioned above, the LLM Paris is run by CCLS, which has full responsibility for the operational management and quality assurance of the programme. The qualification awarded, QA procedures and academic regulations are identical across all QMUL LLMs, and so the Paris programme is as equally highly regarded as the London programme.

The running of the programme is overseen by the academic programme director

with the support of the programme co-ordinator. They handle the academic and operational management of the programme, including marketing, admissions, inductions, programme delivery, assessment and provision of learning resources.

The programme co-ordinator and academic director travel regularly to Paris, as well as flying faculty. The academic director offers office hours when in Paris, and flying faculty often meet with students outside of class time to discuss specific ideas or concerns.

ULIP provide the resources and administrative support necessary for delivering teaching and learning activities in Paris, in accordance with the terms and conditions specified in the partnership agreement. This includes IT and library services onsite, information and welfare support for international students in Paris, and building facilities provisions.

Clear partnership agreement and distinction of responsibilities between the partners, as well as the development of a sense of collegiality, are important factors in facilitating the smooth running of the programme. Regular operational meetings are held with ULIP members of staff, along with student and staff liaison committee meetings, where student representatives and ULIP and QMUL staff discuss issues that concern the student body in Paris. Feedback from students and colleagues at ULIP has been integral in the development of the programmes in Paris and the partnership with ULIP.

The main operational challenge is to deliver the same quality of experience offered in London, and a similar level of student support in an offsite campus. Comparison to the extensive London offering in terms of programmes and extra-curricular activities forced the university not only to adjust the services to the different contexts (e.g. block teaching, access to welfare services in both London and Paris, mentoring opportunities in Paris) but also to develop opportunities unique to Paris students (e.g. a debate team, visits to local law firms, the creation of a CCLS Paris Student Society).

Student expectations are managed at the outset, during the enquiry and application processes. While the Paris LLMs are of the same quality and standing as any other LLM undertaken at QMUL, students are aware of the fact that there are logistical challenges in bringing faculty over, that the module choice is a reduced offering compared to the London LLM, and that there are fewer extra-curricular activities. However, there are a number of advantages appreciated by students. Indicatively, they range from learning in smaller class sizes and benefiting from a close-knit student community, to experiencing student life in Paris.

A number of formal and informal partnerships and collaborations with academic and other organisations in France have been developed over time. For example, CCLS has an agreement with the University of Paris 1 Panthéon-Sorbonne to offer a bilingual double LLM over 18 months; CCLS has a special arrangement with EFB (Paris Bar), where Paris Bar School (EFB) students enrolled at the Bar School are specifically offered to enrol onto the LLM in order to fulfil the personal project element of their Bar studies.

## Sustainability

Activities in Paris are intended to expand as an extension of London operations. Growing CCLS operations requires a step-change in resourcing to support further recruitment, collaboration, research and any other 'spin-off' opportunities, including executive education.

## Students

The intakes are generally very international, with no majority nationality. The student body in Paris is equally as diverse as the student body in London, and although the cohorts are small, there are students from all continents. In addition to Queen Mary School of Law's reputation and global recognition, students are attracted to the programme because of the location and its flexible design. Equally, the collaboration with the Sorbonne and the Paris Bar make the programmes very appealing to European and French students.

The main challenges for students are financial, French immigration processes, language and, overall, the fact that they study in a British university in France. Students are supported through a co-ordinated effort between CCLS, QMUL in Paris and ULIP, both in-person in Paris and remotely. ULIP, with a bilingual team, helps in particular with practical advice and support associated with moving to and living in Paris, including navigating the French bureaucracies of immigration, banking and accommodation. Students have access to advice and counselling support remotely from QMUL, and with the international counselling service via a relationship with ULIP in France.

More widely, professional and personal development is supported through events and other extra-curricular activities to which students are invited. They can have regular contact with a dedicated CCLS careers and professional development team and exchange with professionals, particularly alumni, is promoted on an informal basis and through mentoring.

Peers also provide significant support to each other, which became particularly apparent during the pandemic. The community is small and the cohorts overlap because the LLM has two entry points (September and January). This facilitates students sharing their experience (practical and academic), even in a one-year programme. Students are encouraged to join a social media group and create study groups, and regularly use the space at ULIP, including the LLM classroom when it is not in use for teaching. A unique collegiate atmosphere with mutual support in and outside the classroom has been developed.

Finally, a group of course representatives is elected by students each year, with at least one from each intake; with rolling membership, the group can speak about immediate issues. QMUL responds rapidly to student concerns and has made adjustments over the years, including more frequent and timely communication with students; changes to examination processes (allowing out-of-town students to plan their visits further in advance); and the introduction of a career mentoring scheme to meet the needs of students in a French context.

### **Operating in France**

Brexit, the current HE climate in the UK and the bureaucracies of the French HE system are just some of the challenges that affect activities in Paris. The main response to these challenges is the creation of strong partnerships locally, which not only allows the establishment of QMUL's presence in Paris, but also gains a deeper understanding and enhanced support in matters that affect the programmes, and consequently the students.

ULIP is in a unique position to collaborate with an established British institution that operates in Paris, gaining experience of both the French and British educational modus operandi and knowledge of the wider context.

### **Lessons learned**

It is of the utmost importance to have a good understanding of the local educational system and demands when setting up a TNE operation in a country. Willingness to listen and learn from the local expertise, flexibility and adjustability can facilitate the whole process, as well as strong collaborations with established partners and extended networks with professional bodies and employers.

The programme in Paris is comparable with and, in many respects, identical to the LLMs in London. However, it is an enhanced offer with unique characteristics that differ from the London programmes; the mission of the team supporting the Paris programmes is to 'celebrate, not compensate for' these differences.

Manage student expectations by providing, from the beginning, accurate information and retaining open channels of communications throughout their studies, which improves their student experience and progress.

More initiatives for collaboration between European and British universities should be encouraged, such as exchange programmes, more flexible processes for the recognition of British universities in France, and facilitation of students' and new graduates' mobility.

# University of the Creative Arts and Berlin School of Business and Innovation, Berlin and Hamburg

## Introduction

The University of the Creative Arts (UCA) offers a mix of franchise and validated degrees in partnership with the Berlin School of Business and Innovation (BSBI), which has campuses in Berlin and Hamburg. The partnership started in 2020 with a franchise model, delivering mostly four-year undergraduate programmes focused on the creative arts. More recently it has also validated some programmes delivered by BSBI, and now also offers the global MBA. In 2023/24 over 4,000 students were studying UCA programmes in both cities, and this is growing by more than 1,000 students per year, making it easily the largest and fastest growing UK TNE provider in Germany.

## About the programmes

The undergraduate programmes include bridging elements for English language and are focused on creative industries, which are considered a niche in Germany and have limited local provision. The specialised nature of the provision makes a paid for/private offering attractive to both German and international students.

## Sustainability

The strong growth experienced in the first three to four years of operation is likely to moderate after 2025, but significant short term growth of the programme is anticipated.

## Effects of leaving the EU

The partnership started in 2020 and has grown at a rate of more than 1,000 students a year, so this programme has not been directly affected by Brexit. International students are attracted to studying a UK programme in Germany and German students benefit from the availability of specialised programmes at home and lower fees compared to study in the UK.

## Students

Although initially aimed at German students, there are now a significant number of international students across the programmes. In Berlin the cohort is approximately 70 per cent German, 30 per cent international, but in Hamburg it is 70 per cent international. UCA has no direct involvement in student visas; this is dealt with by the partner.

Many of the students at postgraduate level are professionals studying part-time.

## Operating in Europe/Germany

Ensuring the faculty at the partner institutions understand and are comfortable teaching within the UK framework has been the main challenge. This involves regular teaching and learning sessions for staff.

Obtaining approval to operate has not been straightforward due to the differing regulations in each German state. In Berlin, approval is given via the Berlin Senate

and there is a strict framework for opening new facilities or sites. Berlin and Hamburg have different regulations and have approved different courses.

**Lessons learned**

- Work with academic teams in partner institutions.
- Offer training as part of the validation process.
- Ensure understanding of the UK system (e.g. learning outcomes).



# University of East London, Rheinische Hochschule Köln and Academic Institute for Higher Education, Germany

## Introduction

The University of East London (UEL) has two partnerships in Germany.

Rheinische Hochschule Köln dual degree

The university has been working with Rheinische Hochschule Köln (RH) for about nine years and has a single course, an MBA dual award, developed and delivered together. Students are based predominantly in Germany but also do a module of intense study in the UK.

Unlike in many other examples where the partner delivers the dual award, this model is very much an example of good practice, because students are taught at, experience, and receive a full international award from both institutions. It is a very good partnership in terms of reputational benefits and that true international experience. There are around 36 students currently.

Usually there are two intakes, but this year, due to getting reapproval in Germany and doing the revalidation, there was only one.

## Operating Academic Institute for Higher Education

This is a new partnership that started in 2023. The Academic Institute for Higher Education (AIHE) is based in Lubeck, near Hamburg, and the offering is aimed at professionals in specialist areas of psychology, such as body psychotherapy, and an MSc in mental health with AI. All these courses are delivered online.

This programme started after the Covid-19 pandemic, so students were used to working online, and AIHE are an established online provider. They have approval to deliver five or six courses but currently provide three. Recruitment has been quite slow; currently there are around 53 students, who are mostly German with a small number of international students.

## Operating in Germany

In Germany, the partners are very focused on working professionals, therefore the programmes target the postgraduate market.

Regulation in Germany is by State, and the partners take the lead on that as they are the experts in their country's regulations.

The vast majority of the academic partnership new establishments arise from potential partners reaching out, which reduces specific difficulties and obstacles.

## Strategic priorities

The UEL is not actively pursuing new partners within the EU at the moment. It is currently renewing its TNE strategy and may be working in more Eastern European countries moving forward. There is also UNICAF (University of Nicosia Africa), a global delivery partner of the UEL, responsible for the recruitment, admission, enrolment

and support of online learners to university awards approved for distance online delivery. UNICAF is based in Cyprus but delivers programmes globally, including a focus on Africa.

The last UEL Transnational Education Development Plan (written in 2020) was aligned with UK government education priorities. Finalisation of a new plan awaits the government's new education strategy, so that it also aligns, and UEL can prioritise countries where doors are being opened.

UEL has very clear processes, including ethical, financial, legal and operational quality checks in any country it works with.

### **Lessons learned and challenges**

UEL sought larger, fewer, more strategic partners but, particularly in Germany, have a few smaller partners, because that's what they wanted and needed from an awarding body. Although the large economies of scale that come from working across a number of different schools haven't been achieved, there are still benefits, even though partners are smaller; European partner institutions are good to work with.

The market changes daily and there are many challenges, so the reality is that institutions must be responsive and flexible.

Regulatory oversight is changing and OfS is requesting different things. We then have to consider how our partners in that country are going to be able to comply with the new requirements.



# London South Bank University, International University of Applied Sciences, Germany

## Background

The partnership grew from London South Bank University (LSBU)'s validation agreement with the International University of Applied Sciences, Germany (IU) six years ago. IU started as a small, community-based institution, but over the period of LSBU's association it has grown to become Germany's largest university. It is private, state-recognised institution with 140,000 students enrolled on 250 bachelor's and master's degree programmes delivered online in German and English. Significant equity investment has enabled IU to build a world-class digital infrastructure, plus physical centres, to support online delivery. LSBU's TNE partnerships and programmes, including those with IU, are managed through LSBU Global.

## Students

Currently LSBU delivers eight or nine programmes at any one time with IU, mostly in business-related areas. There are more than 200 enrolled students at any one time. Students are typically more mature, with the greatest numbers studying at master's level. There are very few UK students. Students come from a range of countries, with a particularly high number from Africa. Start dates vary, with students able to enter programmes at a number of points. In theory, because programmes are designed as stackable modules, students can take these at their own pace. In practice, however, most students follow from one module to the next and graduate in around the same time as a student taking a traditional course on campus.

Marketing, recruitment and student data, including progress monitoring, are provided by IU through its digital platform. Student support services are delivered both digitally and in physical centres located across Germany. These provide help and advice, as well as the option for students to sit exams in a physical location. LSBU can access student data for those studying their programmes.

Degrees are awarded separately by LSBU and IU. LSBU employs the same QA processes used for courses delivered on campus. The university is concerned solely with its own degrees. Students are only awarded an LSBU degree once they have successfully met all the university's requirements. Similarly, IU is responsible for the award of its degrees. Students who successfully complete the separate requirements of both universities are awarded a degree from each.

## Governance

The LSBU/IU partnership has developed significantly since its beginning six years ago, and it has faced some important challenges in the process. One major hurdle is that both universities have restructured their delivery operations. In LSBU, LSBU Global has been established to manage TNE partnerships and programme delivery. Meanwhile, IU has grown rapidly to become Germany's biggest institution – essentially an edtech – with large-scale online delivery. Inevitably this has affected the relationship between the two universities. Where once LSBU saw itself as the major partner with total control over the validated programme offer, the balance of power and decision-making have shifted to give IU a much greater say. The relationship

between the two universities, as well as between LSBU Global and LSBU academic departments, has posed challenges requiring careful management. LSBU employs link tutors who provide a bridge between academic content and delivery and have been instrumental in working through solutions to any issues that have arisen.

### **Working in Germany**

Some cultural and academic differences between the German and UK HE systems have also been challenging. These have given rise to some misunderstandings between the partners and also by the students. While the German system is extremely robust, much of it is also based on trust and understandings that are part of a strong academic culture. This is not always transparent outside the system. One example is that German students expect their degrees to be confirmed immediately after their final exam marks are published. In the UK, degree awards are subject to formal approval by the relevant academic board, causing a time lag that students have sometimes found inexplicable. Limited understanding of each other's academic processes also caused some system challenges. One of the challenges for LSBU was obtaining access to their students' data, in particular the monitoring of assessment samples for QA purposes. IU management staff were initially unable to see why LSBU would need this.

Increased staff capacity in LSBU Global has enabled much greater interaction and communication between the partners. This has helped to build considerably better understanding of the different academic approaches and expectations. In turn it has removed some of the initial operational barriers.

### **Lessons learned**

In the future, IU is keen to grow the partnership with LSBU. As yet, it's unclear whether this will continue to be through an online model, as the German government is moving its focus away from online.

LSBU identifies lessons learned:

- Getting to know the country, its HE regulations, requirements and academic approaches and culture is essential.
- Communication is key. Priority needs to be given to this, including investment of staff time and resources to ensure effective communications between the partners. Communication with academic departments in the home university is also crucial.
- TNE needs to be adequately resourced and appropriately structured within the university to maximise its strategic contribution.

# Liverpool Online

## Background

The University of Liverpool's online education model is primarily asynchronous and uses digital techniques to facilitate rich interactions between students and with faculty. Liverpool Online was established in 2000 and celebrates its 25th anniversary this year. Over 22,000 students from 204 countries worldwide have graduated from the university's portfolio of 100 per cent postgraduate courses. These range across business and management, computer science, law, education, psychology, medical and health sciences.

The university's current partnership with Kaplan started in 2019 and it launched its first portfolio in 2021. The partnership delivers 22 master's level programmes hosted across all three university faculties, with academic leads for each programme. Academic direction is set by the university, with programmes going through the university's normal design, approval and governance processes.

Kaplan provides leading-edge digital expertise to bring academic content to life in the online classroom and manage the day-to-day delivery of the programmes, as well as providing a full spectrum of student-related services, including marketing, recruitment and student support.

## Governance

The partnership between the university and Kaplan is clearly defined contractually. University faculty are primarily responsible for academic content and direction, monitoring, moderating and quality-assuring the content. All online lecturers are honorary faculty of the University of Liverpool, many of whom have been part of Liverpool Online for 25 years. In practice, university and Kaplan staff work seamlessly together to ensure a high-quality educational offer for students.

## Students

Students are typically mid-career professionals, aged 35–40 years old, seeking the flexibility to study online and part-time alongside busy work and family commitments, and without taking a career break. While motivations can differ between disciplinary areas, students are commonly investing in their online degree to advance their career and enhance their professional impact in their home country and community. Their experience as students is measured using the same indicators as those used for students on campus in Liverpool, but technology and algorithms are used to more fully understand how students are engaging with the service. This enables early intervention when students are struggling, and the continual shaping and optimisation of the offer in response to their needs and preferences.

## Lessons learned

The University of Liverpool is committed to developing its leadership in online education and to continue to make high-quality education available everywhere in the world to those who would otherwise face barriers to access. While numbers continue to grow, the entry of edtech companies and big corporations vying for students alongside universities makes the market much more competitive.

There are challenges in how to reach and attract the highest-quality students and how to make courses accessible, flexible and responsive to their needs. Rising expectations of quality and demands for clear evidence of tangible outcomes sit in the context of downward pressure on pricing and the need for delivery models that are not easily accommodated within traditional academic structures. For universities who want to succeed in this space, the ability to effectively balance the need for quality, accessibility and innovation in a financially sustainable way will be key.



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