

# TNE PARTNERSHIPS IN SPAIN

## SUMMARY & CONCLUSIONS

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## KEY FINDINGS

The UK-Spain higher education relationship is dynamic and embraces the full range of cooperation that might be expected between internationally successful national higher education sectors. Activities involved include long-term student mobility and recruitment, research cooperation (including for universities and industry), short-term student and staff exchanges, joint & dual degrees, TNE, distance education and language study. To contribute to this over eight thousand Spanish students are enrolled at UK universities and some three thousand UK students study in Spain each year, the latter through Erasmus and other programmes.

The research for this study clearly indicated **a strong interest from both UK and Spanish universities to extend collaboration and reinforce their current good ties.**

The increasing trend of student mobility between the two countries is also driven by student demand to acquire higher competencies in Spanish and English languages respectively. Reflecting this demand, there has been good growth in the provision of programmes delivered in English in Spanish universities, and at both undergraduate and postgraduate levels. In the UK it is apparent that Spanish is becoming increasingly popular with students with many more studying at school level, than ever seen previously.

## UNIVERSITY INSTITUTIONAL PARTNERSHIPS

At the institutional level there is good evidence that universities in both countries are interested in growing more strategic relationships, with similarly focused universities; such institutional links would be comprehensive and embrace more than one activity and/or subject area.

Some Spanish and UK universities are already involved in larger global networks, such as the Coimbra Group (see Section 3) or UNICA (that involves King's College with Universidad Autónoma de Madrid and Universidad Complutense de Madrid).

Santander Universities Global involves directly ninety-two higher education institutions in Spain and over sixty in the UK, this network might offer new opportunities for cooperation.

## CURRENT ECONOMIC CONTEXT

There is uncertainty in the UK associated with the implementation of the new changes to fees and student loans for domestic undergraduates, and thus for any student enrolling from another EU member state. As has been shown in this study, UK universities prioritise the recruitment of Spanish students to postgraduate programmes, and matched with this is the demand from Spanish students for these, but it does seem likely that fees for UK Master degrees are likely to rise. The financial difficulties in Spain are likely to affect private sector enrolments to universities in Spain and likewise on both university and research funding at UK.

The existence of full-fee private sector universities in Spain has resulted in Spanish students being more aware of the true costs of provision, compared with students elsewhere. Thus Spanish students, seeking undergraduate programmes, might be attracted to the UK in greater numbers, given that they can access low interest loans in the UK. Additionally the repayment for

these loans is income contingent and thus would be advantageous to Spanish students entering employment in Spain, given relatively lower salaries in the country.

Affordable options for postgraduate programmes delivered in English, including for employment related Master degrees will likely become increasingly attractive in Spain. As has been seen in other countries with high levels of unemployment, new graduates frequently seek additional skills to compete more favourably in a competitive labour market. This implies probable growth in demand for dual and joint degrees and TNE programmes delivered in Spain.

## RECRUITMENT FOR STUDY IN THE UK

**Undergraduate recruitment:** There would seem to be much potential to attract more undergraduates to follow programmes in UK higher education institutions. UK universities are an attractive destination for Spanish undergraduates, amongst whom there is a strong desire to acquire both English language skills and follow a high quality degree programme, both perceived as essential to enhance their international mobility and employment. There are already nearly three thousand Spanish undergraduates enrolled and while business and related studies are popular, there is also strong interest in engineering and technology, creative arts and design, languages and literature, politics and biosciences. These disciplines in general accord with the recruitment priorities mentioned by UK universities with interests in Spain.

It is also apparent from the enrolment data that Spanish undergraduates are spread across many universities, no single group or geographical location seem to dominate. However, for some reason, a smaller proportion are enrolled in Scottish institutions, which is somewhat surprising given the 'no-fees' regime in the country.

Spanish students seeking study in the UK are influenced by their peers, both in Spain and those already studying in the UK, and by staff at their current place of study. They use social network sites and undertake detailed web research on all study opportunities. Any UK university seeking to recruit Spanish students needs to ensure that its web presence is optimised for Spanish searches and also that pages are available in Spanish; this latter helps intending students show their parents options for study destinations. A further easily identified target group for recruitment are the international schools in Spain that offer English medium programmes leading to A level and IB qualifications.

As was discussed in Section 4, given the changes to undergraduate fees in English universities, and the removal of number restrictions on the recruitment for high achieving students<sup>1</sup> implemented in Autumn 2012, this introduces new uncertainty across the English higher education sector. Currently most Spanish undergraduates in English<sup>2</sup> universities are counted in the 'capped' programmes, except those who might have taken A Level or International Baccalaureate examinations and achieved the 'AAB' grades. However this might not necessarily be a factor in the future. An additional consideration, as mentioned previously, could be the added benefit for Spanish students to access official loans available for EU students enrolling in England and Wales.

**Masters degree recruitment:** There has been very strong demand growth amongst Spanish students to study at Master degree level in the UK, no doubt the existence of affordable one-year programmes leading to an internationally recognised postgraduate degree delivered in English is very attractive. This contrasts with the general lower availability of Spanish Master

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<sup>1</sup> Relaxation of the 'cap' on students achieving AAB grades at A level.

<sup>2</sup> Note that although Scottish universities have a 'no fees' policy there is also a cap on enrolments of all Scottish and non-UK EU students

degree programmes, many of them two years in duration and many of which charge fees near the levels of those in the UK.

In addition to the direct marketing and communication approaches mentioned for undergraduates above, there would seem to be opportunities to grow double degree and articulation (or twinning) partnerships with Spanish universities for delivery of Master degree programmes (see below).

There will no doubt be increases in fees for UK domestic (and hence EU) Master degree students, however programmes could still be affordable to Spanish students, as is apparent from the business studies area where many Spanish students are enrolled on UK programmes with fees in excess of £10,000.

**Research students:** The UK has consistently attracted about eight hundred enrolled Spanish students each year. The largest concentration is in all the STEM areas, although with politics, amongst the social sciences being popular. The main research-intensive universities attract the majority of students, and while Cambridge, Oxford and UCL are the leading recruiters, no one university dominates.

The largest single funding source for fees derives from the student's own resources and these account for over a third of enrolments, UK institutions pay for about thirty percent of students and many research students in engineering and physical sciences have their costs met by UK Research Councils. Spanish and other foreign funding sources account for most of the rest.

## TNE MODELS AND OPPORTUNITIES

The research identifies a good number of TNE agreements between UK and Spain Higher Education institutions but, most importantly, it highlights there is a strong interest to build these type of agreements by a much larger number of institutions at both sides. Apart from Student exchanges (Erasmus included) and Research, the reports identifies 4 main types of Transnational Education models:

- **Validation or franchise programmes.**
- **Delivery in Spain of a UK degree top-up to a Spanish qualification:** formalised accreditation of a Spanish qualification to grant direct access to Part II of a degree course, provided that the content in Spain might be satisfactorily mapped onto Part I of the UK course. Accreditation of these qualifications, which are often delivered outside the validated college, might allow students to qualify for their UK degree after two further years of study.
- **Articulation with a Spanish qualification for a top-up in the UK:** Several UK universities monitor and accredit some three-year private college diplomas to allow entry to a final year top-up taught on the UK University's own campus in the UK.
- **Articulation with UK qualification for entry to a UK degree top-up delivered in Spain:** Edexcel has accredited several colleges for the delivery of HND programmes in Spain. Two of these, have been validated by a British University to offer Bachelor degrees in Creative Media Production and in Video Game Design and Art and Design (with Graphic Design and Fashion options).

## THE FUTURE OF TNE AND DEGREE DELIVERY PARTNERSHIPS

**Double, joint and other forms of degree delivery partnerships:** There are already a number of successful degree delivery partnerships with Spanish universities that fall within these general descriptions and they seem set to expand. Joint degrees seem less common, probably because they normally require more complex clearances in the participating universities.

Double degrees offer an attractive proposition at the Master degree level, especially if, as expected, Spain changes its current degree structure and moves to a 3+2 format. These might also include some form of articulation route, for example an initial period in a Spanish university followed by up to twelve months in the UK partner where the Master degree will be awarded.

Similar articulation or transfer agreements are possible at the undergraduate level, with a number of programmes in place. It could be that the Scottish four-year degree might offer more flexibility for such partnerships.

**Delivering UK degrees in Spain (TNE):** There were over four thousand Spanish students enrolled on UK degree programmes delivered in Spain in 2010-11. The largest single group (2,300 enrolments) were following University of Wales validated programmes and there remains some doubt regarding successor arrangements, following the recent changes at the University. The success of the University of Wales in developing these partnerships with some high quality private sector, non-degree awarding institutions in Spain, indicates there is **strong in-country demand**. The local partners for these programmes have been appreciative of the support from the University of Wales particularly the attention to detail, the quality assurance requirements, and checks through all aspects of delivery and assessment. There is no doubt that they would welcome some form of successor arrangement.

While the degrees validated by the University of Wales are delivered completely in-country, some other institutions have developed partnerships based on accreditation and advanced standing to qualify their students for a top-up course, to be delivered on the UK university's home campus. Two colleges have developed articulation arrangements with a UK university based on a HND programme followed by a degree top-up totally delivered in Spain.

Students enrolled on these programmes have typically paid about €6,000 per annum in fees. There is likely to be a growth in demand for affordable, good quality and employment related degree programmes in Spain, both to top-up local non-degree programmes as well as for applied Masters' degrees.

In addition the Open University had successfully developed its delivery of programmes in Spain with over five hundred students enrolled. The activity to date has involved local support staff, however policy changes for the delivery of programmes in Europe at the Open University, will result in support coming direct from the UK.

Given this demand as well as for the degree partnership arrangements mentioned previously, the need is for any UK university interested in growing in-Spain delivery to assess the potential market and its segmentation in Spain and the variety of institutions that might prove to be appropriate partners, from public and private sectors, and both degree and non-degree awarding institutions.

## PERCEIVED DIFFICULTIES

A number of UK institutions identified reasons for them not prioritising TNE delivery in Spain; these included lack of understanding of both the Spanish market for such programmes and also the local regulatory requirements. Other respondents suggested that countries outside Europe were normally a higher priority in their international strategy.

## THE FUTURE

The report outlines the **demand is high at both sides**. It also highlights there are a number of constraints which are, namely:

- 1.- The lack of knowledge of the regulatory and legal requirements in country

2.- The need to explain the market opportunities in Spain.

The British Council Spain is happy to pursue any individual requests from British Universities and provide the necessary information about regulation, the contacts of key local institutions that may be willing to enter TNE agreements or direct marketing in the form of advertising, roadshows or other, under our SIEM services. Contact [carolina.jimenez@britishcouncil.es](mailto:carolina.jimenez@britishcouncil.es) for a quotation of any of the services above.