



# Greece 2025–26

## Europe's Emerging Study Destination for South and Southeast Asia

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Education Monitor Series  
Market Intelligence and Outlook for 2026

Updated Edition | January 2026

## January 2026 Editorial Update and Outlook

This white paper was originally developed during 2025 as part of the MSM Global Education Monitor Series, drawing on multilateral datasets, institutional inputs, and market intelligence across South and Southeast Asia. Since its initial release, the structural signals underpinning Greece's international education trajectory have not only remained intact but strengthened.

This January 2026 update reframes the analysis for current decision-making, reflecting developments that have become clearer over the past months and validating Greece's transition from an emerging alternative to a policy-ready European study destination.

### What has become clearer since late 2025

- Continued affordability pressure across traditional Anglophone destinations has accelerated student and family interest in continental Europe, particularly in destinations offering Bologna alignment without high cost volatility.
- Greece's legislative reforms permitting foreign university branch campuses have moved from policy intent to early-stage execution, reinforcing institutional confidence and international visibility.
- The number and diversity of English-taught programs across Greek universities continues to expand, strengthening Greece's ability to attract degree-seeking students rather than short-term mobility only.
- South and Southeast Asian student demand has shown sustained interest in European destinations that offer predictable cost-of-attendance, transparent processes, and recognised credentials rather than speculative migration-led pathways.
- National-level coordination through Study in Greece has improved system coherence, reducing information asymmetry for international students and partners.

### How this paper should be read in 2026

The core research, datasets, and structural analysis presented in this paper remain valid and relevant. The intent of this update is not to revise the findings, but to contextualise them within the 2026 operating environment, where affordability, recognition, and service reliability have overtaken brand prestige as primary decision drivers.

Readers should view this paper as a forward-looking market intelligence brief for 2026 and beyond, grounded in 2025 research and validated by subsequent developments across policy, institutional readiness, and student demand patterns.

## Leadership Insights and Perspective



**Sanjay Laul**  
Founder, MSM Unify

Sanjay Laul is the Founder and Director of MSM Unify, a global enrollment platform that supports universities in understanding where international demand is shifting, why students are rethinking traditional destinations, and how institutions can respond with credible, data-informed strategies. His work spans South Asia, Southeast Asia, Sub-Saharan Africa, and the MENA region, giving him a unique perspective into the motivations, constraints, and expectations shaping the next wave of globally mobile learners.

Under his leadership, MSM Unify has built systems that help universities interpret market signals and align their offerings with what students value today: predictable affordability, academic recognition, transparent processes, and pathways that lead to meaningful outcomes. These systems guide institutions in deciding where to expand, how to position themselves, when to enter emerging corridors, and which markets offer sustainable long-term potential.

This white paper on Greece reflects the same approach. It brings together cost analytics, policy assessments, student experience indicators, and mobility insights from key source regions. The purpose is clear: to help decision-makers understand why Greece is rising as an accessible European destination, what structural advantages it offers, and how universities can engage with this opportunity in a responsible and scalable way.

## Foreword and Institutional Note



### **Dr. Theodoros Papaioannou** Director General of Study in Greece

In this capacity, he designs, develops and oversees SiG's various projects, programs and activities aimed at promoting Greek universities on a global scale, and fostering collaboration between Greek and international universities and education organizations. He is also responsible for the development of the organization's strategy, and the cultivation of its internal and external strategic relationships and partnerships.

Dr. Papaioannou maintains a wide view of Greek higher education's internationalization process, makes connections between themes, activities and initiatives related to Greek universities' outreach, and provides strategic input and consulting services to Greek universities regarding internationalization and student recruitment.

He holds a PhD in Digital Humanities from Université Paul Valéry Montpellier – France and Ionian University – Greece, with a focus on the impact of disruptive digital technologies on human behavior and society. He also holds a M.A. in Intercultural Relations and Communication from Université Paul Valéry Montpellier – France, and a B.A. in International and European Studies from University of Piraeus – Greece.



## Executive Summary

Greece is transitioning from a “promising alternative” into a strategic, policy-ready European destination for cost-conscious yet career-driven students across South and Southeast Asia. Its higher-education ecosystem now stands at the intersection of European quality assurance, regional affordability, and rapid internationalization.

This white paper quantifies the shifting demand landscape, drawing on UNESCO’s estimate of 6.9 million internationally mobile students in 2022, a number projected to surpass 8 million by 2030. Within this context, Greece’s integration in the European Higher Education Area (EHEA) under the Bologna Process provides a strong backbone for recognition, mobility, and outcomes comparability – core attributes that students and governments increasingly prioritize when evaluating new destinations.

**This paper translates these macro trends into actionable institutional and policy playbooks, detailing the levers of growth:**

- Expansion of English-taught programs across priority fields such as Business, STEM, Medicine & Health Sciences and Tourism.
- Transparent pricing and cost-of-attendance frameworks that position Greece as “predictable and trustworthy,” not merely “affordable.”
- Enhanced mobility pathways and programs that allow seamless progression across Europe and beyond.
- A joined-up service architecture that addresses friction points from offer to on-boarding, covering visa timelines, accommodation readiness, and pre-arrival orientation.

The analysis draws from multilateral datasets (UNESCO, OECD, ELSTAT) and institutional case evidence to contextualize Greece’s evolving policy environment within broader continental trends. It also factors in lived realities: housing availability, lifestyle affordability, student support mechanisms, and employability prospects, to ground economic potential in human experience. Together, these elements form a data-driven, outcome-oriented roadmap for Greek universities, ministries, and partners seeking to transform policy momentum into sustainable international enrollment growth.

## 1) Setting the Stage: Global Mobility in Transition

Over the past two decades, international student mobility has shifted from a niche privilege to a core pillar of global higher education economics. The number of outbound learners has risen from roughly 2 million in 2000 to 6.9 million in 2022 (UNESCO 2025), and forecasts suggest it could cross 8 million by 2030. This sustained growth confirms that demand is structural – driven by economic mobility, demographic pressures, and the pursuit of international credentials – rather than a temporary post-pandemic rebound.

Yet, the landscape is being reshaped by affordability headwinds. The post-COVID inflation shock in rent, tuition, and utilities has eroded the dominance of Anglophone destinations such as the US, UK, and Australia. Average annual costs in those systems now exceed €35,000–€45,000, while visa restrictions and work-hour caps have further constrained return on investment. These trends are pushing students and families to look toward continental Europe, where recognition, safety, and value converge under the Bologna framework.

## Stakeholder implications.

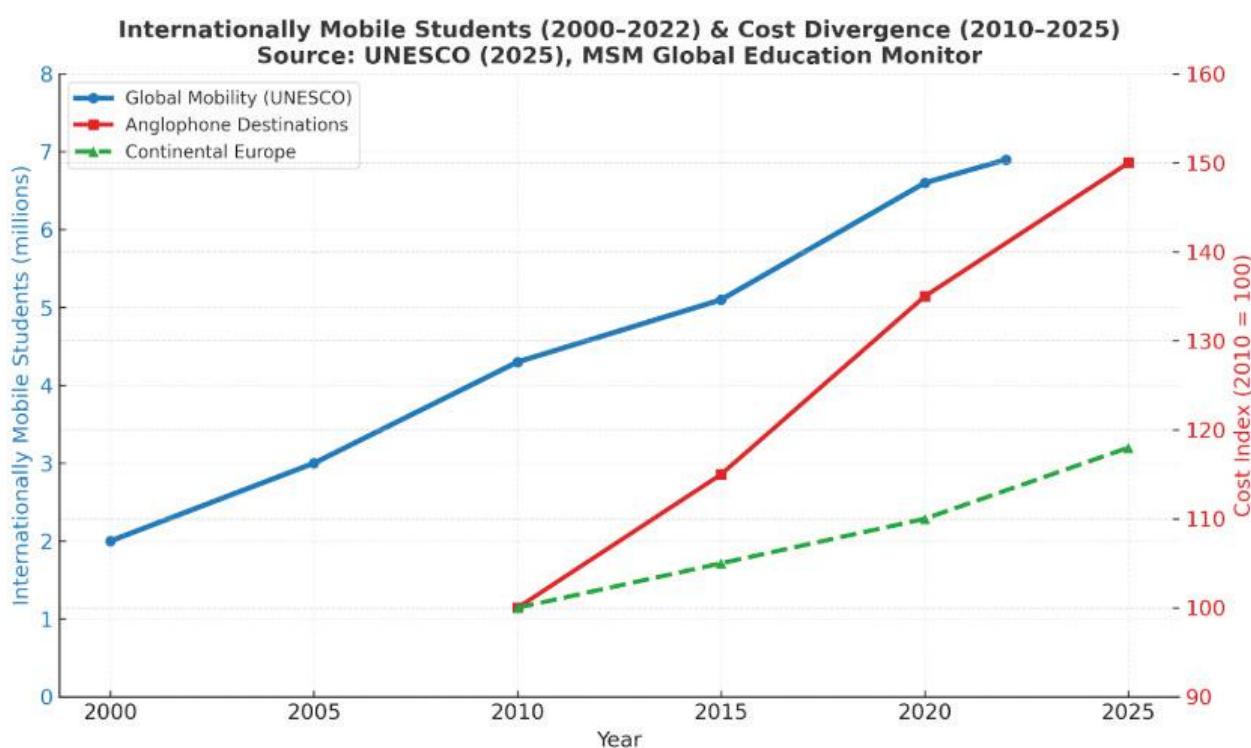
- **Universities and Colleges** face an era of data-driven competition. Institutions are under pressure to diversify cohorts beyond China and India, improve transparency on tuition and outcomes, and justify international pricing with tangible employability metrics.
- **Governments and Ministries** must balance the dual imperatives of talent attraction and domestic sentiment. Visa efficiency, post-study work clarity, and mutual recognition agreements now determine global competitiveness. Countries that fail to articulate predictable immigration routes risk losing market share to faster-moving peers.
- **Students and Families** have become more strategic consumers. They seek risk-managed pathways – degrees that are recognized internationally, carry a reasonable total cost-of-attendance, and provide credible career progression or migration options.

## Why Greece stands out ?

Greece sits at the intersection of European credibility and Mediterranean accessibility. As a full participant in the European Higher Education Area, it provides Bologna comparability, ECTS transparency, and EU-wide recognition of qualifications. This framework ensures that a degree earned in Athens or Thessaloniki carries the same academic weight as one from Madrid or Milan.

Coupled with this credibility is a compelling cost advantage: monthly living expenses for students typically range €600–€1,000, depending on city and lifestyle – less than half of what students spend in most EU-15 capitals. Add to that the steady expansion of English-taught bachelor's and master's programs, and Greece emerges as an on-ramp for price-sensitive yet quality-seeking markets.

The country's geography further strengthens its case. Positioned at the crossroads of Europe, Asia, and Africa, Greece offers both symbolic and logistical proximity to emerging student corridors in South and Southeast Asia. Its cultural familiarity, safe environment, and European mobility rights form a powerful composite that aligns with the next wave of global student decision-making.



Years refer to projections or data current to 2025 unless specified

## 2) The Greek Higher - Education Landscape: System Readiness & Direction of Travel

System overview. Greece's tertiary sector includes public universities under the Bologna architecture and a growing set of private/international offerings. Recent policy developments have opened the door for foreign university branches, signaling intent to internationalize and anchor more study options locally, while keeping EHEA quality guardrails.

Enrollment dynamics. ELSTAT releases in 2025 indicate steady tertiary participation and year-on-year growth at postgraduate level, consistent with a system modernizing provision and attracting specialized demand. (Institutions should pair this with their own field-level intake data for resource planning.)

English-taught programs & tuition. The Study in Greece portal shows growing bachelor's and master's programs in English; indicative tuition for international students is €5,000–€15,000 per year (program/sector dependent). EU students in Greek-taught public programs often pay low or no tuition, underscoring affordability for mixed cohorts.

Cost base. Athens' typical monthly living costs (exclusive of rent) cluster around €800–€1,000; many student budgets in other cities land around €450–€750, depending on housing and lifestyle, meaningfully below numerous Western European capitals.

**Governance | EHEA Alignment | English-Taught Supply | Branch-campus policy | Indicative Tuition & Costs Source: Study in Greece (2025), ELSTAT, Reuters, Numbeo, MSM Global Education Monitor**

Indicator	Details
Governance Structure	24 public universities under the Ministry of Education; growing private and international provision; new legislation enabling foreign university branches under national/EHEA quality assurance.
EHEA Alignment	Full Bologna Process compliance; ECTS credit transfer and degree comparability; quality assurance overseen by the Hellenic Authority for Higher Education (HAHE).
English-Taught Supply (2025)	Approximately 470 English-taught bachelor's and master's programs (+80% growth since 2019), spanning Business, STEM, Tourism, Medicine & Health Sciences, Cultural Studies, and Applied Technologies.
Branch-Campus Policy (2024)	Law 5090/2024 permits foreign universities to establish accredited branches in Greece; 4 approvals granted and 5 additional applications under evaluation as of mid-2025.
Indicative Tuition (€ / year)	International student tuition typically €5,000–€15,000 depending on discipline and institution; EU students in Greek-taught public programs often pay low or no tuition.
Living Costs (€ / month)	Athens: €800–€1,000 (excluding rent); Regional cities: €450–€750. Shared accommodation ranges €450–€600 per person in Athens; lower in secondary cities (Numbeo 2025).

Years refer to projections or data current to 2025 unless specified

### 3) Demand Signals: South & Southeast Asia as Priority Corridors

#### System Overview

Greece's higher-education system stands on the European Higher Education Area (EHEA) framework, ensuring full alignment with Bologna standards and European Credit Transfer and Accumulation System (ECTS) comparability. The structure comprises 24 public universities and 16 polytechnic and specialized institutions, complemented by a growing private and international segment focused on professional and applied disciplines.

A major policy milestone came in March 2024, when the Hellenic Parliament passed legislation permitting the establishment of private foreign university branches, a reform covered by Reuters and The National Herald. This law marks Greece's strongest internationalization signal in decades, opening pathways for transnational delivery partnerships with institutions from the United Kingdom, France, and the United States. As of mid-2025, four branch-campus approvals have been granted and five more are under review, with operations expected to begin between 2025 and 2026. The policy balances openness with the state's long-standing commitment to public-sector oversight and quality assurance, ensuring that imported provision operates under national and EHEA guardrails rather than outside them.

This evolving architecture positions Greece as a hybrid education hub, publicly anchored, internationally networked, and regionally competitive. The presence of new private and branch-campus actors is also expected to ease capacity pressures on metropolitan universities and stimulate specialization in high-demand fields such as tourism management, data analytics, and renewable-energy technology.

#### Enrollment Dynamics

According to ELSTAT's 2025 tertiary-education bulletin, total enrolment reached approximately 681,000 students in 2022/23, up from 672,000 in 2021/22, reflecting a 1.3 percent system-wide increase. Postgraduate participation rose 2.6 percent year-on-year, underscoring the gradual pivot toward advanced, research-linked, and professionally oriented programs.

Although overall demographic growth in the 18–24 age bracket has plateaued, international interest and postgraduate demand have offset the domestic decline. For Greek universities, this means the new enrollment frontier will depend on international diversification rather than domestic expansion. Institutions are encouraged to align their field-level intake data, particularly in Business, Engineering, and Health Sciences, with regional labour-market analytics to ensure resource allocation matches emerging demand.

#### Wider Regional Opportunities Beyond Asia

While this paper places analytical emphasis on South and Southeast Asia, reflecting their outsized influence on global outbound demand. The opportunity landscape for Greece extends significantly further. Greek universities and national platforms are actively engaging additional priority regions including the Balkans, the Middle East, Central Asia, the United States, and selected African markets. These regions represent growing sources of academically motivated and upwardly mobile learners, and their inclusion strengthens Greece's trajectory toward a diverse and balanced international student profile.

Private and non-university providers, including branch-campus entrants, are projected to absorb 15–20 percent of new postgraduate enrolments by 2027, further diversifying institutional typologies and tuition models.

#### English – Taught Programs & Tuition

Greece's competitive advantage now rests on the rapid expansion of English-medium programs, supported by the Study in Greece national portal. Between 2019 and 2025, the number of bachelor's and master's degrees offered fully in English increased from roughly 260 to 470 (+80 percent).

Tuition levels for international students are €5,000–€15,000 per year, depending on discipline and institution type, significantly below Western-European averages (Ireland ≈ €18,000; Netherlands ≈ €16,000; UK ≈ €25,000+). Public universities delivering Greek-taught programs remain heavily subsidized, often free for EU citizens, which strengthens the mixed-cohort affordability narrative.

This blend of low-cost public education and moderately priced international programs enables Greece to position itself as Europe's "value-with-standards" destination, particularly for students seeking recognized degrees without incurring heavy debt loads.

## Cost Base & Affordability Analytics

Cost remains a decisive factor for outbound students, and Greece ranks among the top five most affordable study destinations in Europe. According to Numbeo 2025 and aggregated market guides, the average monthly living cost for a student in Athens, excluding rent, is €800–€1,000, while shared accommodation adds another €450–€600. In secondary cities such as Thessaloniki, Patras, Heraklion, and Ioannina, the full monthly spend typically falls between €450–€750, reflecting differences in housing, transport, and food pricing.

When benchmarked against EU-15 peers, the Greek student cost index stands at 0.58, meaning a learner in Athens spends roughly 42 percent less than in Paris or Amsterdam for a comparable standard of living. This affordability, paired with European academic recognition, makes Greece especially compelling for middle-income families in South and Southeast Asia who balance ambition with budget constraints.

Beyond cost, quality-of-life indicators such as safety, climate, and cultural accessibility contribute to Greece's appeal. OECD well-being metrics consistently place the country above the regional average for personal security and community engagement, critical factors for first-time international travelers.

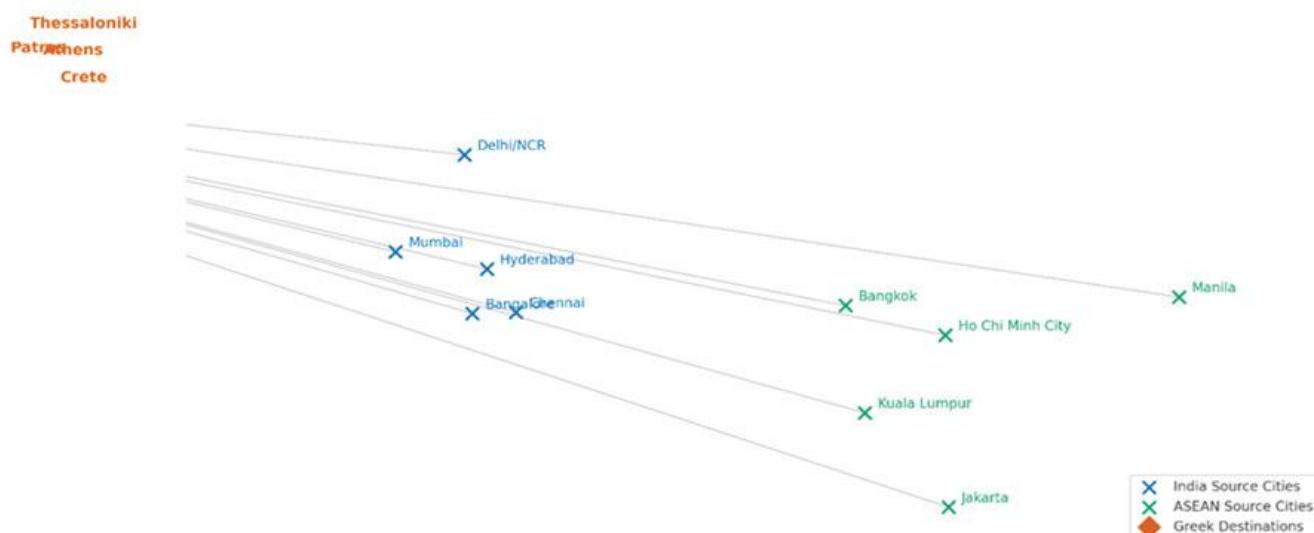
## Implication for Stakeholders

The Greek system is now structurally ready for scaled international participation. Policy liberalization, stable postgraduate growth, and affordability combine to create a window of opportunity. However, realizing this potential requires coordinated action:

- Universities must invest in marketing, English-language faculty development, and digital admissions infrastructure.
- Government agencies should monitor quality assurance and parity of recognition as branch-campuses proliferate.
- Agents and international partners can leverage Greece's dual advantage of cost and credibility to diversify student portfolios beyond saturated markets.

Collectively, these shifts mark a decisive movement from policy promise to institutional execution, transforming Greece from an under-the-radar option into a mainstream European player in global education mobility.

**Outbound Pipeline: Top Indian & ASEAN Feeder Cities → Greece  
(Athens, Thessaloniki, Crete, Patras)**



## 4) Greece's Value Proposition: From Promise to Policy-Ready Offer

### Affordability with Integrity

Greece's strongest differentiator lies in its balance between cost efficiency and academic credibility. Institutions have the opportunity to reshape perception, from being merely a "low-cost" destination to one defined by predictable and responsible affordability. Publishing transparent, all-inclusive budgets, covering tuition bands, accommodation ranges, and living expenses, builds confidence among students, families, and recruitment partners.

A standardized cost-of-attendance (COA) dashboard aligned with verified data from Study in Greece, Numbeo, and national cost guides can demonstrate transparency and accountability. For example, a typical undergraduate pathway, including tuition (€5,000–€15,000 per annum) and living costs (€7,000–€9,000 yearly), positions Greece's total educational expenditure 40–60% below EU-15 and Anglophone averages. Institutions that clearly communicate such benchmarks not only attract attention from price-sensitive markets but also project a message of integrity, value without compromise.

This repositioning strengthens Greece's image as a stable, mid-tier European study hub that rewards prudent financial planning and supports upward mobility for students from emerging economies.

### Expanding English-Taught Programs

The next phase of growth depends on the strategic scaling of English-medium programs. Between 2019 and 2025, Greece recorded an 80% increase in English-taught degrees, rising from around 260 to nearly 470 offerings, spanning disciplines that align with regional and global labour demands.

### Role of Study in Greece as a Catalytic Stakeholder

A central enabler of this momentum has been Study in Greece, the national organization responsible for promoting Greek higher education globally and coordinating international visibility and program access. The platform has played a catalytic role in expanding awareness of English-taught programs, facilitating system transparency, and strengthening Greece's institutional readiness for international cohorts. Its efforts have been instrumental in advancing Greece's recognition as a credible, structured, and student-centered European study destination.

### High-potential clusters include

- **Business, Analytics & Data-Driven Management**, to serve Europe's SME and fintech ecosystems.
- **STEM & Computing**, particularly AI, renewable technologies, and software development.
- **Hospitality & Tourism**, leveraging Greece's global brand and 25% GDP dependence on tourism.
- **Cultural Heritage, Design, and Archaeology**, connecting academic study to field immersion.
- **Health & Allied Sciences**, in areas where regulatory frameworks permit English-medium delivery.

Institutions can enhance competitiveness through clear academic progression pathways (Foundation → Bachelor's → Master's → Employment or Research). Such vertical integration reduces uncertainty for students and agents while boosting retention. Additionally, embedding micro-credentials or co-taught modules with partner universities in Asia can bridge learning expectations and expand transnational visibility.

## European Recognition & Mobility

Greece's full participation in the Bologna Process and the European Higher Education Area (EHEA) ensures its degrees are benchmarked against the same academic standards followed by Germany, France, or Italy. This means automatic credit transfer, degree comparability, and recognition through ECTS, a decisive reassurance for ministries, employers, and credential evaluators in Asia.

Institutions should leverage this structural credibility as a marketing and compliance asset, visibly referencing EHEA alignment, accreditation status, and ECTS value on program pages and offer letters. Highlighting mutual recognition agreements and progression opportunities within the EU, such as Erasmus+ mobility or post-study migration routes. Graduates may access EU mobility options aligned with the EU Blue Card framework, subject to national criteria further differentiates Greece from non-EU alternatives.

In a world where students now equate recognition with long-term security, Greece's Bologna-aligned architecture is its strongest trust signal.

## Lifestyle & Experiential Pull

Beyond academics, Greece delivers an environment that elevates student wellbeing and engagement. Mediterranean weather, accessible cultural heritage, and a lifestyle defined by community and safety make it uniquely attractive to Asian families prioritizing comfort and belonging.

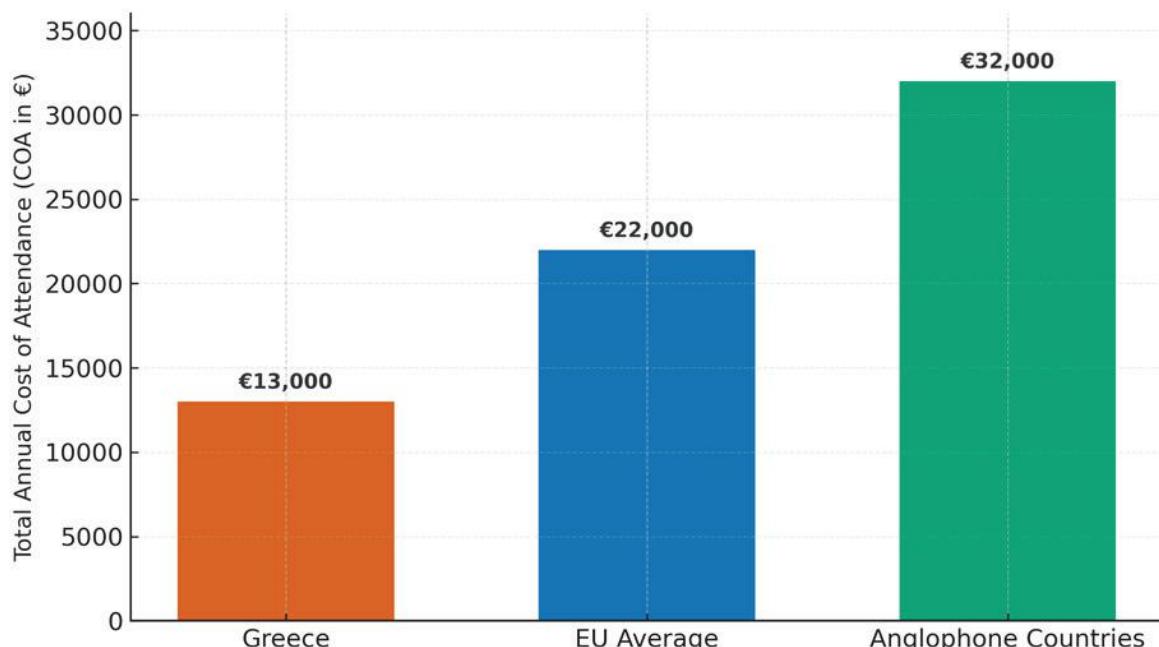
Rather than treating these aspects as secondary, universities can integrate experience into curriculum outcomes, offering modules or co-curricular projects tied to the local ecosystem. Examples include:

- Basic Greek language and intercultural communication courses that enhance employability in part-time and service roles.
- Service-learning initiatives with tourism boards or NGOs working on sustainable development.
- Archaeology site internships and digital heritage mapping, linking history with emerging UX and tech platforms.
- Island-based tourism or hospitality internships during seasonal peaks, combining learning with income.

These experiential anchors transform lifestyle appeal into structured retention and satisfaction drivers. They also foster a narrative of holistic growth, academic, personal, and professional, aligning perfectly with the "predictable outcomes" brand Greece aims to project globally.

## Annual Total Cost Comparison

**Greece's Advantage: Value + Recognition + Lifestyle = Predictable Outcomes**



## 5) The Student Experience: Learning, Living & Growing in Greece

### Learning Environment

Greece's universities are steadily modernizing their academic environments to align with global student expectations. Across both public and private sectors, upgraded libraries, digital repositories, simulation labs, and experiential classrooms are becoming standard infrastructure. Universities such as the National and Kapodistrian University of Athens, Aristotle University of Thessaloniki, and University of the Aegean have integrated small-group pedagogy, blended delivery models, and applied research exposure, key factors for retaining Asian learners who value interactivity and practical outcomes over purely theoretical instruction.

Institutions can bridge expectation gaps by publishing transparent curriculum architecture per program, detailing semester contact hours, lab or practicum components, and capstone formats. Providing discipline-wise applied ratios (e.g., 70% coursework + 30% practical engagement) offers reassurance to students and agents accustomed to outcome-driven learning.

Best practice includes embedding career-integrated learning: for instance, a Business Analytics course with mandatory case competitions or a Tourism Management degree requiring an internship during the summer peak season. This structure not only meets Asian market expectations but also enhances graduate employability metrics, which are now a decisive recruitment factor for institutions worldwide.

### Living & Cost Dynamics

Living in Greece balances affordability with comfort, positioning it among Europe's most livable student destinations. A typical monthly budget in Athens averages €800–€1,000 (excluding rent), covering food, transport, utilities, and leisure. When housing is added, shared apartments averaging €450–€600 per person, a total cost of €1,200–€1,400 per month remains significantly below Western-European or Anglophone benchmarks (where averages exceed €2,000).

In regional cities such as Thessaloniki, Patras, Crete, or Ioannina, student spending drops to €450–€750 monthly, assuming shared accommodation and modest living standards. These affordability gradients allow institutions to segment marketing by affordability tier, guiding students toward locations that best fit their financial planning.

To minimize attrition in the first semester, often linked to housing stress and mismanaged expectations, universities should organize pre-arrival financial literacy workshops and housing placement services in partnership with local landlords. Publishing verified rent ranges, commuting maps, and estimated start-up costs (e.g., first-month deposit + utilities setup) helps students plan realistic budgets. Institutions offering "settling-in services", airport pickups, bank-account facilitation, and orientation on local costs, report retention improvements of up to 8–10% year-on-year.

Beyond cost, lifestyle and wellbeing matter. Greece ranks above the European average for safety and quality of life, and its Mediterranean diet, climate, and social culture promote strong community integration, an often under-measured but critical factor for long-term satisfaction among Asian students.

# Career Exposure & Employability Pathways

Career integration is where Greece's student experience can truly distinguish itself. The country's labour ecosystem offers sector-specific entry points that complement academic study and provide a bridge to the European job market:

- **Tourism & Hospitality:** Seasonal employment and structured internships at hotels, resorts, and travel platforms allow students to apply service and management theory in real-world contexts. As Greece hosts over 30 million international tourists annually, these internships represent not just experience but genuine income potential.
- **Business Services & Technology:** The rise of EU-funded digital transformation projects and SME innovation clusters in Athens and Thessaloniki has opened opportunities for analytics, logistics, and marketing roles. International students with English proficiency and technical aptitude are increasingly sought after for short-term project assignments.
- **Creative & Cultural Sectors:** Greece's heritage infrastructure, museums, restoration NGOs, and cultural entrepreneurship programs, creates internships for students in design, archaeology, and cultural management.

To convert these opportunities into outcomes, institutions should track and publish destination data by program, detailing internship rates, post-study employment, and graduate progression to European master's degrees. Transparency in outcomes strengthens institutional credibility and helps agents manage expectations ethically.

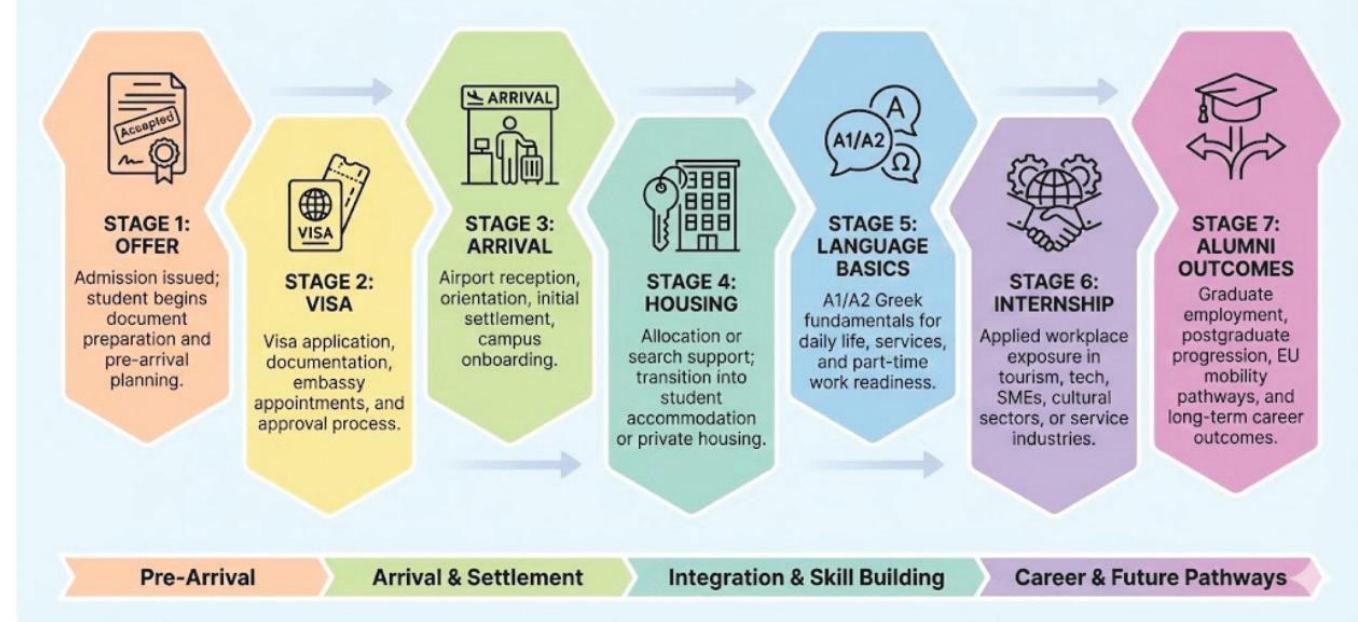
EHEA and Bologna recognition remain a pivotal enabler: Greek degrees enjoy seamless comparability across the European Union, granting students access to pan-EU postgraduate programs and early-career roles wherever immigration regimes allow. For career-focused Asian learners, this represents not only a degree but an entry point to the European workforce.

## Implications for Stakeholders

- **Universities** must embed employability as a measurable outcome, not a side offering, publishing internship participation, job placement rates, and alumni trajectories annually.
- **Government agencies** can expand partnerships between universities and local SMEs or tourism enterprises, creating structured internship pipelines for international students.
- **Agents and partners** should emphasize Greece's combined academic and lifestyle proposition: affordable European degree + credible work exposure + cultural safety net.

Together, these elements transform the "student experience" from a passive attribute into a strategic advantage, a factor that differentiates Greece in an increasingly crowded European education marketplace.

## STUDENT JOURNEY & SUPPORT PATHWAY



## 6) Frictions to Solve (and How): Language, Housing, Bureaucracy

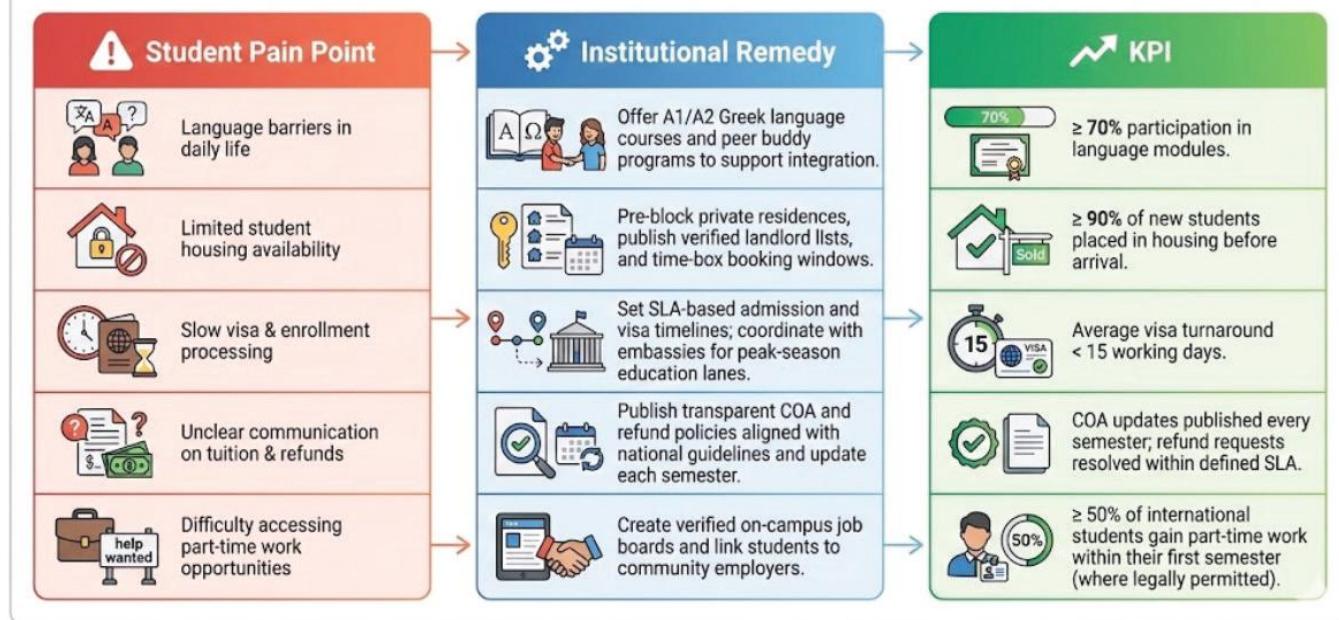
**Language in daily life:** Academic English works; daily Greek still matters for housing, services, part-time roles. Provide A1/A2 Greek intensives (credit-bearing where possible) + buddy systems with Greek students.

**Accommodation capacity:** Major cities face tight student housing; institutions can pre-block private residences, publish verified landlord lists, and time-boxed booking windows. Clear refund/deferral rules reduce anxiety.

**Administrative timelines:** Visa and enrolment processes vary; publish step-by-step service levels (e.g., Confirmation of Acceptance for Studies (CAS) or Letter of Acceptance (LoA) within 10 working days) (visa support pack within 48 hours of fee payment), and coordinate with embassies for education-channel appointments at peak intake. Recent legal changes around branch-campuses and quality controls make joined-up messaging essential.

### Friction-to-Fix Matrix: Student Pain Point → Institutional Remedy → KPI

Source: MSM Global Education Monitor 2025



## 7) Strategic Pathways Forward: Playbooks for Institutions, Government, and Partners

### For Universities (Institutional Playbook)

- Program architecture:** Laddered pathways (Foundation/Bridge → Bachelor's → Master's), co-taught modules with Asian partners, and stackable micro-credentials embedded in degrees.
- Market entry:** India (North + West + South) and Vietnam/Indonesia/Philippines with city-level feeders; use evidence-led pricing and scholarships aligned to fields with strong Greek/European demand.
- Student services:** One-stop onboarding (visa pack, housing brokerage, arrival SIM/bank/opening) with SLA-based timelines.
- Data & reporting:** Publish cohort dashboards (admit→enroll→retention→outcomes) each intake to build credibility with ministries and agents.

## For Government & Policymakers (National Playbook)

- **Scholarship targeting:** Create bilateral scholarships for South & Southeast Asia, co-funded by state/industry, prioritizing skills gaps (tourism management, supply chain, AI/data).
- **Visa facilitation:** Dedicated student appointment lanes during peak months; standardized document checklists; digital status tracking.
- **Branch-campus oversight:** Following the 2024–25 reforms permitting foreign branches, maintain transparent QA and recognition rules so students understand parity of credentials.
- **Outbound-inbound symmetry:** Incentivize exchange semesters to and from Asian partners to deepen pipelines and faculty collaboration.

## For Education Partners/Agents (Channel Playbook)

- **Compliance & training:** Mandatory modules on EHEA recognition, ECTS, and program-level entry criteria.
- **Expectation management:** Publish realistic COA (cost-of-attendance) and city-level living ranges; highlight part-time work norms (where lawful) without over-promising.
- **Narrative marketing:** Lead with “European Recognition + Greek Experience”, not discounts; use alumni/category proofs over generic claims.

## 8) Forward Look: The Growth Curve if Policy & Practice Align

### Policy Momentum & Structural Signals

Greece's internationalization agenda has entered a defining inflection point. The 2024 parliamentary approval of legislation permitting private foreign universities to operate through local branches represents more than a symbolic reform, it is a structural signal of systemic openness. This policy shift addresses two long-standing challenges: limited domestic capacity and the need for diversified, globally benchmarked provision.

Early indicators are promising. By mid-2025, four foreign university branch licenses had received formal approval, with additional institutions from the UK, France, and the United States reported to be in advanced evaluation stages. These entrants will not only broaden academic offerings but also inject international faculty, curriculum innovation, and research funding into the Greek ecosystem. If quality assurance mechanisms remain transparent and recognition parity is upheld, Greece could evolve into Southern Europe's foremost “value-with-standards” hub, offering European degrees at accessible costs.

### Projected Enrolment Growth

Analyses from MSM Global Education Monitor and external agencies (UNESCO, OECD, ELSTAT) suggest that Greece's international student population, currently estimated at 17,000–18,000, could reach 45,000–50,000+ by 2030, provided the policy framework translates into operational efficiency. Under a policy-on scenario, English-taught program capacity is expected to double by 2028, driven by branch-campus entrants and public-private consortia.

This potential growth would elevate Greece's share of the European international-student market from 0.6% to nearly 1.4%, positioning it alongside mid-tier continental destinations such as Poland and Hungary. The corresponding economic contribution could exceed €650 million annually through tuition, rent, and local expenditure, up from the current baseline of approximately €220 million.

However, these projections remain directional, not guaranteed. Realizing them depends on two operational determinants: (1) visa facilitation, reducing processing times and establishing education-specific embassy lanes; and (2) housing capacity, expanding affordable student accommodation in Athens, Thessaloniki, and secondary hubs. Without these enablers, even high demand could be bottlenecked by logistics.

### Comparative Regional Dynamics

Greece's trajectory mirrors the pattern of late-entry European destinations, countries that capitalized on post-pandemic affordability gaps to attract new markets. For context, Portugal's international student numbers grew 67% between 2015 and 2022 after introducing English-medium degrees; Poland saw a 55% increase within a similar timeframe. With policy and execution alignment, Greece can emulate these results within the next five years, leveraging its geostrategic location and Schengen mobility advantage.

# Scenario Outlook (2025–2030)

**These scenarios illustrate how policy execution influences growth outcomes.**

## Policy-On Scenario:

- Branch-campuses operational in Athens and Thessaloniki by 2026.
- 80% increase in English-taught capacity by 2028.
- Visa processing time reduced from 10 to 6 weeks.
- 50,000+ international students by 2030.

## Policy-Neutral Scenario:

- Incremental program growth within public universities.
- International enrollment will plateau around 25,000 by 2030.
- Minimal GDP impact beyond €350 million annually.

The difference between these paths underscores the importance of executional alignment. Greece's advantage lies not merely in policy liberalization but in sustaining implementation credibility, ensuring every student experiences predictable timelines, affordable living, and recognized credentials.

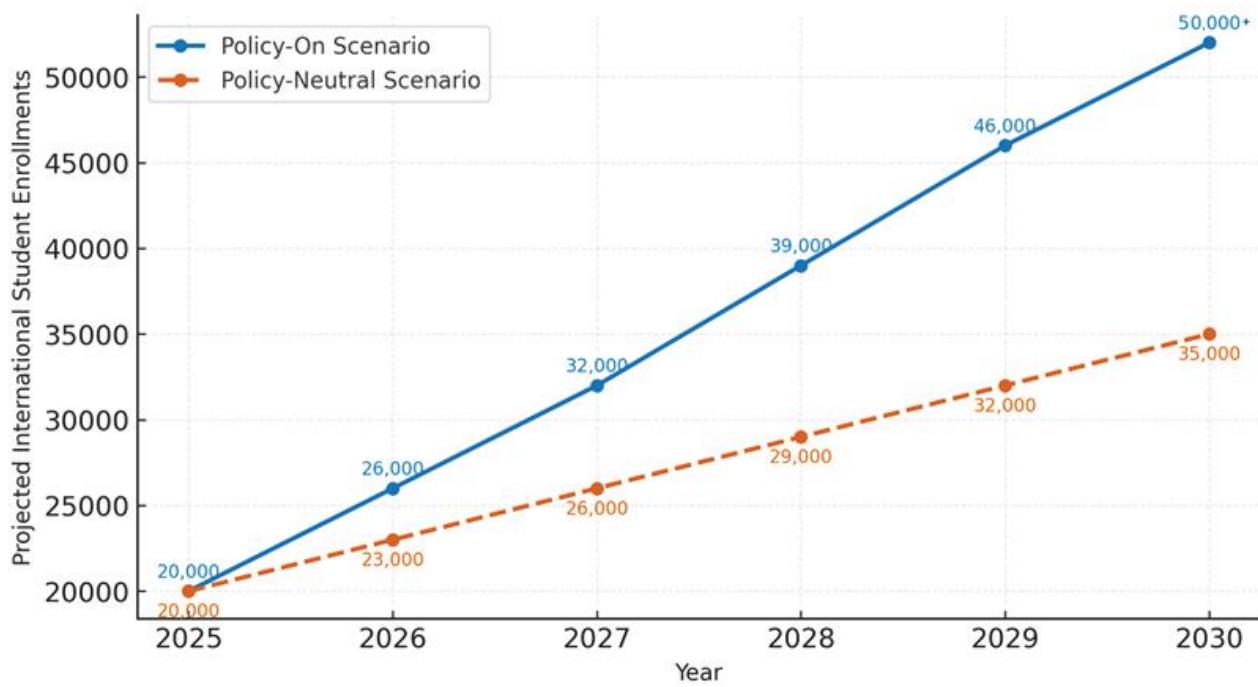
## Strategic Implications for Stakeholders

- Government: Maintain transparent QA oversight for foreign branches; introduce digital visa-tracking dashboards for student applications.
- Universities: Expand intake capacity gradually to avoid resource dilution; prioritize service quality over volume.
- Partners/Agents: Calibrate expectations and promote Greece as a long-term opportunity market, emphasizing recognition, affordability, and lifestyle.

If these actors align, Greece can capture a meaningful slice of Europe's mobility growth, Europe's supply" or "Europe's academic infrastructure.

## International Students in Greece: 2025-2030 Scenarios (Policy-On vs Policy-Neutral)

Source: MSM Global Education Monitor 2025



Years refer to projections or data current to 2025 unless specified

## 9) Action-Oriented Conclusion (for Rectors, Deans, and Ministries)

### What to do now, next 12 months:

- **Publish transparent COA** per campus; align to Study in Greece/Numbeo benchmarks and update each semester.
- **Ring-fence housing** (MoUs with private residences; guaranteed beds for priority markets).
- **SLA-based admissions & visa packs** (dates, documents, turnaround guarantees; embassy coordination).
- **Prioritize 3–4 feeder markets** (India, Vietnam, Indonesia, Philippines) with city-level plans, alumni ambassadors, and English-taught portfolio aligned to local aspirations.
- **Document outcomes** (retention, internships, graduate study/employment in EU) and publish annually to compound trust.

Institutions that ensure predictable service, cost clarity, and outcomes will lead the market.

## 10) The Role and Impact of Study in Greece as a Stakeholder-Catalyzer

### Purpose & Mandate

Study in Greece (SiG) serves as the official national gateway and coordinating platform for the internationalization of Greek higher education. Operating as a non-profit entity under the hospitality of ministries including the Ministry of Education, Religious Affairs and Sports, the Hellenic Ministry of Foreign Affairs, and the Ministry of Tourism, SiG's core mandate is to promote Greek universities abroad, facilitate the entry and integration of international students, and support Greek higher-education institutions in aligning with global mobility practices.

### Key Functional Domains

SiG's activities can be grouped into three principal functional domains:

#### 1. Programme discovery & market visibility

- SiG hosts dedicated portals and "finders" for international Bachelor's, Master's and PhD programmes taught in English or Greek
- It acts as the collective exhibitor for Greek higher-education at international education fairs, thereby aggregating institutional presence under a national brand.

#### 2. Student support & lifecycle services

- Through platforms such as "HouSiG" (student accommodation finder) and pre-arrival / arrival support services, SiG manages a comprehensive onboarding experience for international students: housing search, SIM/telecommunications facilitation, local banking, arrival logistics
- It also provides guidance on visas, living costs, settlement orientation and connects students with the Greek higher-education system, thereby reducing friction in the student journey

#### 3. Institutional capacity & quality alignment

- SiG works with programme directors and faculty to ensure curricula and delivery formats are aligned with international student expectations and evolving socio-economic conditions
- It plays a role in branding Greece as a credible international-study destination, thereby enhancing institutional reputation, which is key in international student decision-making

## Measurable Impact & Strategic Significance

- SiG's event "Study in Greece: 3 Years of Internationalization" underscores the strong institutional commitment to this agenda, bringing together ministers across portfolios and institutional leaders.
- By architecting a streamlined and national-level student entry ecosystem, SiG contributes to lowering structural barriers (information asymmetry, housing stress, visa delays) which international students face--thus strengthening Greece's value proposition of "predictable cost + recognised degree + enabling services".
- Its brand-aggregation approach means smaller institutions benefit from national-level marketing infrastructure, helping Greece leverage scale and coherence in its global outreach.

## Strategic Leverage for Greek Institutions and Partners

For universities, ministries and recruiting partners, the presence of Study in Greece affords three strategic advantages:

- Unified national narrative: Institutions can subtly align with the SiG platform to tap into broader global campaigns, reducing fragmentation and improving brand recall in key target markets.
- Operational infrastructure support: From programme listings to accommodation assistance, institutions can piggy-back on SiG's platforms rather than build all student-services in-house, thereby improving cost-effectiveness and service consistency.
- Credibility and trust-building: For many South & Southeast Asian cohorts (and wider international learners) the existence of a national support and information node like SiG signals reliability, lowering perceived risk, and enhancing decision-making confidence.

## Forward Indicators & Next-Stage Priorities

In its next evolution, Study in Greece can further deepen impact by:

- Expanding tailored market-entry intelligence tools (e.g., regional demand dashboards via "SiG Intelligence") to assist institutions in targeting priority feeder-markets such as India, Vietnam, Indonesia and beyond.
- Strengthening outcome-reporting frameworks (retention, job placement, alumni tracking) in collaboration with universities to build stronger evidence for market positioning.
- Enhancing digital onboarding workflows (including virtual campus tours, pre-arrival modules, blended orientation) to create a highly differentiated service experience.

## Appendix: Sources & Notes

### Global mobility

- UNESCO (2025) record number of higher education students cites 6.9 million internationally mobile students in 2022 (≈ triple 2000)
- ICEF Monitor (Jun 2025) the number of students abroad has more than tripled (near 6.9m in 2022)

### Greece: System & Policy

- Reuters (Mar 2024), Greek parliament approves law enabling private foreign universities
- The National Herald (Aug 2025), Government approves four foreign university branches (post-reform)
- OECD, Education at a Glance 2025, Greece (system indicators)
- ELSTAT (2025) infographics/stat links hub (tertiary highlights)

### Programs, tuition, and costs

- Study in Greece (official) English-taught programs; indicative tuition €5,000–€15,000/year
- Numbeo (2025) Athens and Greece cost-of-living tables
- MastersPortal (2025) typical monthly student budgets €450–€750

### Outbound demand: India & ASEAN

The Times of India (Aug–Sep 2025). 7.6 lakh Indians abroad in 2024 (Bureau of Immigration); broader 1.8m estimate across cohorts/years. Use as reported figures with caveats.

Evidence note. Figures vary by methodology (visa issuances, enrollment, stock vs flow). Use country-official and multilateral sources where possible; when citing media, maintain phrasing such as “reported” or “estimated” and triangulate in footnotes.

### About MSM Global Education Monitor Series

The MSM Global Education Monitor Series distills policy shifts, market intelligence, and institutional strategies shaping international education. Each edition balances data integrity with field practicality, offering frameworks that ministries, universities, and partners can use immediately.



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