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The Future of TNE

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In summer 2017, the British Council published a research report entitled “The Shape of Global Higher Education” that measured and compared governmental support for international mobility, transnational education (TNE) and international research collaboration. It noted that there was, within countries, “a strong positive relationship” between having supportive policies for international student mobility and for TNE, and suggested that this is in part because student mobility “is an integral part of many types of TNE” (Ilieva et al. 2017: 25).

This seemingly simple statement on the relationship between TNE and mobility shows the extent to which TNE has been reconceptualised in very recent years. In fact, much of the activities that institutions now call TNE are outside its traditional definition: education leading to a

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degree that is delivered in a country other than the country in which the awarding institution is based.

The traditional concept of TNE refers to programme mobility rather than person mobility. TNE in this sense has been brought into operation within institutions as a strategic alternative to international student recruitment—that is, an alternative to person mobility. At institutional level, this has been, therefore, consistent with the development of TNE export precisely as a hedge against volatility in international student recruitment markets.

TNE has been a rational response to such risk—and it remains so today. At the time of writing (September 2017), onshore recruitment of international students to the UK is stagnant but TNE is experiencing a boom. In fact, TNE growth was five times greater than international student recruitment to the UK in 2014–15 (HEGlobal 2016; see also Chap. 8). The downturn in inward mobility was a consequence of two factors identified in the Introduction: the rise of new players in the global higher education (HE) market and the UK government's political decision in 2012 to stem the number of incoming students. Brexit is a further self-imposed reason for the slowdown in recruitment.

But there is a problem—one that is frequently alluded to at TNE seminars and conferences. It is that the traditional concept of TNE implies a “neo-colonialist” mindset. This was discussed briefly in Chap. 4. The essence of this mindset is twofold: first, that degree provision developed over a long period of time in one location can be transplanted and reproduced in another; and second, that the principle behind the traditional definition is mercantilist and unidirectional: we produce, they consume.

This export-led approach to international HE remains an enduring part of the UK mindset, but many within the HE sector at least are aware that it is no longer consistent with the aspirations of prospective partners in other countries. The UK government's view of HE internationalisation, however, remains firmly instrumental and mercantilist. This is illustrated by the arbitrary targets for export revenue placed by the government upon the sector. The most recent target, articulated in 2015, was earnings of £30 billion by 2020 (Government of UK 2015). This is not what the “importing countries” want to hear, but their perceptions and aspirations are evidently not a concern.

From One-Way to Partnership Models

Some TNE delivery models do fit well into the traditional import/export definition, with one-way programme provision and no student mobility. Distance learning delivered online to students in other countries represents more than half of UK TNE in terms of student numbers, and is mostly one-sided. The same goes for franchising and validation, in which an exporting institution's programme is delivered by a partner institution overseas for a series of fees (franchising) or in which an exporting institution awards a degree for a programme designed largely by the overseas partner (validation). Given that these are also large delivery modes in terms of student numbers, export-led TNE remains dominant.

Chapter 5 discussed the dynamics of managing the relationship between home and branch campuses. The evolution of international branch campuses is interesting. They appear to epitomise the traditional definition of one-way programme mobility but there are as many different models as there are campuses. As has been argued elsewhere (e.g., Hiles 2016), the “take-it-or leave-it” neo-colonial picture is really no longer accurate: UK branch campuses are increasingly integrated into local environments and many have local partners (they are often required to).

Two big developments in branch campuses illustrate the departure from the export-led programme mobility concept. The first is inter-campus mobility programmes: Nottingham and Heriot-Watt universities, for example, have well-developed programmes for their students to transfer freely between campuses in the UK, China, Dubai and Malaysia, and this includes mobility back to the UK. In a similar vein, New York University insists that there is no hierarchy of home-versus-satellite operations across its integrated network of three full campuses and 11 other sites around the world. This network-type model of TNE could be considered as a precursor of what Hawawini (2016) defines as the “metanational institution”—that is, an open and fluid network of campuses that has no home-campus bias (Hawawini 2016). Overall, we observe bidirectional person mobility, and less hierarchical organisational structures are quickly becoming part of the branch campus collaborative offer.

The second development, which takes years to come to fruition, is the implementation of distinct research agendas relevant to the host countries and regions—the University of Nottingham’s Centres for Islamic Finance and Tropical Environmental Studies in Malaysia are good examples. On a similar line, the American campuses at Qatar Education City, such as Texas A&M, have developed collaborative research on water reclamation and solar energy with local industry and with Qatar University itself.

Branch campuses are prestige projects for exporting universities and the governments of importing countries, and they consequently receive more media attention than their relatively modest student numbers warrant (see also Brexit, below). But the gradual trend in TNE is towards explicitly partnership models that include student mobility. These include articulation (or progression or pathway) arrangements, by which students typically do a foundation course with a partner institution abroad and progress to degree study in, for example, the UK. A report for Higher Education Funding Council for England in 2014 found that 34% of international students arriving in the UK did so via an articulation programme—and much higher percentages of students from China and Malaysia in particular (Ilieva 2014). On a practical level, it is becoming increasingly difficult to distinguish between “at home” and “abroad” provision—this observation is developed below.

But the most egalitarian partnership model for TNE is that of international dual degree programmes. In Chap. 4, it was pointed out that such programmes—many of which are at postgraduate level—are marginal in terms of both student numbers and income generated (data from HEGlobal 2016). It is very likely that online delivery (with or without local partners) and franchising and validation will continue to dominate TNE delivery at undergraduate level and in terms of overall student numbers.

Even so, the direction of travel matters. A British Council TNE project in Thailand that commenced in 2015 drove home the point strongly that the future of TNE—for research-intensive universities especially—will be built on equal international partnerships. The priorities of the participating Thai universities were, and continue to be, dual degrees (including at postgraduate level), student and staff mobility in both directions, and developing existing research expertise and new research collaborations (Lawton 2016).

Their prioritising of mobility as a core rationale for TNE challenges our traditional definition of TNE, but the recent British Council report mentioned above (“The Shape of Global Higher Education”) demonstrates that our thinking is already changing. Although the Thai Ministry of Education is a very recent (in 2017) convert to the presumed benefits of enticing foreign universities to establish campuses in Thailand, Thai universities see TNE as part of a wider international partnerships strategy. They do not want to “import” anything and do not see foreign involvement primarily as a matter of “capacity-building”—they believe they are past that stage of development. Chapters 2 and 3 demonstrate, incidentally, that this collaborative view of TNE is much closer in ideal to the non-commercial and institutional partnership approach assumed by the German and Dutch governments from the start.

Brexit and TNE

There is currently (2017) little respite from the Brexit debate in the UK and this concluding chapter offers none either. The Brexit vote in 2016 was strongly but unsuccessfully opposed by the UK university sector. The debate and its aftermath triggered media excitement over how the sector would respond; perhaps predictably, this focused on the possibility of new UK campuses on the continent as a means of securing continued access to both EU students and EU research funding.

Europe has historically been more important to the more research-intensive universities in the UK. Sixty per cent of the UK’s internationally co-authored papers are with EU partners, and German and UK researchers co-author more papers with each other than with any other country except the USA. In 2015, TU Dresden alone had 132 research projects with 57 UK universities (and 15 more under negotiation).

But the teaching-led universities that compete with each other for international students have tended to look *beyond* Europe to the bigger student markets in Asia—although this historical distinction is changing.

UK TNE in Europe involved about 75,000 students in 2015–16—about a tenth of the worldwide total for UK TNE. Most is delivered by a

partner or by distance education, and there are only a handful of UK campuses in the EU (including Middlesex in Malta, Central Lancashire in Cyprus, Sheffield in Thessaloniki—and University of London in Paris, depending on the definition used).

The Brexit-led speculation was that a campus presence in Europe would both offset the recruitment risk once free movement of people was terminated, as well as facilitate access to funding from the European Research Council and Horizon 2020.

But branch campuses are not part of the internationalisation strategies of most universities; in this case, leaders at universities such as Manchester said they did not see the value or logic of a European campus. Branch campuses may work best where there is under-capacity in HE, and UK campuses would be competing in markets where quality is generally high and tuition is free or subsidised. Perhaps the risk to recruitment was over-estimated because thousands of EU students come to England already and take out substantial student loans when they can study at home for free. In the event, the decline in recruitment from other EU countries for autumn 2017 entry was about 4%—less than feared.

For many UK universities, the biggest threats posed by Brexit are to the maintenance of collaborative research links with Europe and to the ability to attract top researchers from the continent. The UK government may wish to have the “associated country” status of non-EU members such as Switzerland, Norway and Turkey in order to participate fully in EU research programmes. But the European Commission might see that as incompatible with the ending of free movement of people. A clear implication of Brexit, for which there is already anecdotal evidence, is the exclusion of UK scholars from big collaborative research bids.

In regard to TNE, perhaps a more rational concern is the manner in which Brexit will impact on *existing* UK TNE provision in the rest of Europe. This includes consideration of cross-border degree recognition. In Greece, for example, where the UK has a substantial amount of franchised and validated TNE provision, the government defied EU directives for years and did not effectively recognise any TNE qualifications until 2015. Brexit means the potential loss of the EU legislative protective net for TNE students and local providers.

Conclusions

As HE provision internationalises and traditionally importing countries develop their own capacity, it can be asked whether TNE is an idea whose time has already come and gone. The answer depends on what exactly is meant by TNE. The example from Thailand suggests at least that when a HE sector reaches a certain level of maturity, the producer-consumer model of TNE is inconsistent with their institutional and national aspirations.

TNE models are evolving in conjunction with this development of capacity in education-importing countries. The direction of travel is towards bidirectional partnerships with mutual benefits for all parties. As the HE sectors of countries that import HE develop and mature, it seems inevitable that, at both governmental and institutional levels, they will seek bidirectional partnerships with universities in the traditionally exporting countries. In an echo of the Uppsala internationalisation business model for companies (Johanson and Vahlne 1977), this might be seen as an entirely predictable trajectory for the internationalisation of HE: from domestic provision, to export-led, then franchising, and finally mutuality.

The preferred partnership models require that academic ownership must consequently shift to them. Students in the traditionally importing countries have more options to choose from and competition between foreign and domestic providers can increase (Tsiligiris 2014). The current situation in Qatar shows also that initial competition can give way to collaboration. TNE providers seek to develop differentiating attributes for comparative advantage but in all cases these must demonstrate relevance to the host environment—not least through establishing research and skills links with local industry and institutions.

As the provision of TNE matures, the boundaries between at-home and offshore provision blur. The amalgamation or convergence of TNE with traditional at-home activities is exemplified by the increasing difficulty to develop a fixed definition for TNE that captures the full range of existing activities.

It would appear in fact that the future of TNE is secure. It remains a work in progress. Its continuing expansion follows from the adaptability of its business models, the expectation that global demand for HE will continue to grow and on the risks inherent in international student recruitment—or even the perception of those risks. Predictions that the growth of TNE would be greater in student numbers than the growth of international student mobility have been borne out over the past few years.

There will be a mass market for HE globally for the foreseeable future. Where mass HE exists, technology-assisted education is the norm and it provides the scale. Online and distance learning is a growth industry from Latin America to North Africa. In South Asia, it is taking hold, slowly.

Online education is expanding as a preferred model of TNE for most Western universities. Fifty-two per cent of UK TNE is delivered through distance or online learning, and more than 80% of these students are with the Open University and University of London International Programmes. Top research universities in the UK offer fully online versions of their master's degrees—using very different models but often at the same price as the campus version. For all the unrealised hype attached to MOOCs (massive open online courses), one of their undisputable effects was to raise the profile of online HE and to legitimise it in the eyes of students, universities and governments. Online provision can be cost-effective and it is a delivery mode that carries relatively low reputational risk because control of academic quality and operations is maintained.

At the same time, it appears that blended learning is becoming the “new normal”. For example, 70% of University of London International Programmes TNE students are undergraduates and almost all of them have a blended option through which partner institutions worldwide provide either full-time or part-time provision face-to-face. Some German universities such as the Free University of Berlin also offer blended master's degrees. In the Netherlands, as we saw in Chap. 3, online learning is characterised as a supplement to the traditional face-to-face forms of HE and learning.

Franchising and validation are also relatively easy modes of delivery for institutions prepared to invest in monitoring and overcoming the potential reputational risks posed by local partners.

However, one-way producer-consumer relationships are increasingly seen as insufficient and unsustainable by importing countries. Sending your students abroad, receiving a very few students from other countries, and importing HE through TNE are not a pathway to realising the goals of developing quality HE at home, with excellence in research and relevance to regional, national and local economies. Instead, the models of TNE that interest like-minded and research-driven prospective international partners are egalitarian in formal structure, even if the partner institutions occupy vastly different pegs on the international reputation hierarchies. For example, double degrees at master's and doctoral levels, with student mobility in both directions and the promise of research collaboration, meet these strategic requirements. This "mutual mobility" model of TNE is seen as qualitatively distinct from the programme mobility model and is increasingly preferred by major TNE importing countries.

TNE has been a driving force behind emerging forms of global HE delivery. A very nascent one is the use of virtual reality technology that facilitates synchronous online delivery so that the physical locations of providers and students become irrelevant. At the bricks and mortar level, TNE was the genesis and driving force behind the evolving transition from the campus model to the "metanational" university.

The relevance of TNE is apparent and its value to prospective partners is shifting. Traditional views are being challenged and new ones adopted. TNE as a delivery mechanism for education and as a subject of research in its own right deserves consideration and discussion. This book has demonstrated some distinct approaches and programmes and highlighted key thematic concerns within the theory and practice of TNE. TNE is no silver bullet to educational reform and success. It is increasingly delivered within distinct contexts and being leveraged accordingly. The balance of power is shifting towards the "receiving" countries. The understanding of opportunities and challenges changes also.

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