

Two decades of international branch campus development, 2000-2020: A review

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Abstract

Purpose – The research aims to assess the achievements and challenges of international branch campuses (IBCs) to date, and to consider how IBC development may progress in the future.

Design/methodology/approach – The article presents a review of the scholarly and grey literatures on IBCs. The commentary and discussion is structured around the objectives, perspectives and experiences of three key stakeholder groups, namely the institutions that own IBCs, students and host countries.

Findings – Some IBCs have failed to achieve their student recruitment and financial targets, while others have been successful, often expanding and moving into new, larger, purpose-built campuses. In the last few years, several countries have announced their intention to become a transnational education hub, or at least to allow the establishment of IBCs. It may be reasonable to assume that when there is demand for a particular product, supply will eventually follow. IBCs will survive and prosper as long as they provide benefits to each of their main stakeholder groups (i.e., students, institutions and governments), and as long as the local demand for higher education places exceeds the total supply.

Originality/value – The article provides a comprehensive and up-to-date review of IBC developments and research during the period 2000-2020. The findings and conclusions will be of interest to both researchers and practitioners.

Keywords Transnational education, Cross-border education, International branch campuses, Offshore campuses, International programme and provider mobility

Introduction

Over the last three decades, international branch campuses (IBCs) have emerged as a distinctive and prominent feature on the global higher education landscape, but it was not until after 2000 that the rate of IBC development accelerated quite dramatically. In 2000, there were 72 IBCs operating globally, but by 2017 this number had grown to 263 (Garrett *et al.*, 2017). Although IBCs account for less than 0.1% of higher education student enrolments globally (Altbach and de Wit, 2020), the success of IBCs may be important to a range of stakeholders, which include the institutions and partners that own them; the source and host countries; students; and employers.

Many host countries rely on IBCs to increase higher education capacity, satisfy labour market skills needs, and contribute to knowledge creation and innovation (Wilkins and Juusola, 2018). However, Altbach and de Wit (2020) claim that there is little or no evidence that IBCs contribute to the improvement of higher education in host countries, while other research has found that

students at IBCs are often dissatisfied with the standards of teaching, learning resources, support services or campus infrastructure and facilities (Bhuiyan, 2016).

The purpose of this review is to consider, on the basis of published research and data, the extent to which IBC stakeholders' objectives, needs and expectations are being satisfied. This review is important and necessary because IBCs are among the biggest financial and reputational risks that universities take, and also host country regulators must ensure that IBCs fulfil quality, cultural and ethical expectations. Thus, the study's research question may be stated as, 'To what extent are the objectives, needs and expectations of IBC stakeholders being satisfied?'. Before the literature and data that may answer this question are considered, a working definition of an IBC is offered; trends in IBC development are identified, in terms of source and host countries; and an overview of published research on IBCs is provided.

Definition of international branch campus

IBCs have been defined in various ways, but to date the most used definition among researchers is that offered by Garrett *et al.* (2016). However, Wilkins and Rumbley (2018) suggested that this definition unreasonably includes the requirement to deliver entire academic programmes, while at the same time omitting certain key features that are essential to the essence of what a branch is, at least according to how the terms 'branch' and 'campus' are used in business and higher education. This article uses the Wilkins and Rumbley (2018, p. 14) definition of an IBC:

“An entity that is owned, at least in part, by a specific foreign higher education institution, which has some degree of responsibility for the overall strategy and quality assurance of the branch campus. The branch campus operates under the name of the foreign institution and offers programming and/or credentials that bear the name of the foreign institution. The branch has basic infrastructure such as a library, an open access computer lab and dining facilities, and, overall, students at the branch have a similar student experience to students at the home campus.”

International branch campus development

As IBCs involve the movement of higher education providers and academic programmes across national borders, they are a form of transnational or cross-border higher education. The direction of the earliest IBC development was generally from the global north (the developed Western countries) to the global south (e.g. developing countries in the Middle East and South East Asia). By the late 2000s, Australia, the United Kingdom (UK) and United States (US) accounted for 65% of all IBCs operating globally (Becker, 2009). Institutions from these countries have two clear advantages in the global higher education marketplace: they operate in higher education systems perceived internationally as high quality and they teach in English, the lingua franca in international business and diplomacy. Some of the institutions that established an IBC were prestigious and could be considered as 'world class' – such as Monash University, University College London, Carnegie Mellon University, and New York University – while other institutions were from the second and third tiers of global rankings. In fact, Kosmützky (2018) suggests that an IBC may be a suitable internationalisation strategy for any type of higher education institution.

Of the IBCs that were established between 2017 and 2020, approximately half belonged to institutions based in the US or UK. However, by the late 2000s, developing countries increasingly became source countries as well as host countries. In 2017, Russia was the source of 23 IBCs, while India provided seven and China six (Garrett *et al.*, 2017). Since the mid-2010s, the rate of IBC development has slowed, possibly because the most popular transnational education hubs – i.e. Malaysia, Qatar, Singapore and the United Arab Emirates (UAE) – became saturated, and

institutions found it increasingly difficult to attain student enrolment targets. Also, institution managers increasingly recognised that a foreign outpost was more likely to generate a financial loss than profit. Nevertheless, new IBCs have still been established and others are planned for the early 2020s, indicating that this form of transnational higher education remains attractive to some institutions, students, and host country governments.

One of the drivers of continued IBC development is the increase in countries seeking to act as transnational higher education hubs. The term 'education hub' has been applied to countries that attempt to position themselves as centres for student recruitment, education and training, and in some cases research and innovation (Knight, 2011). Some higher education hubs aim to attract internationally-mobile students from neighbouring countries, who remain in the country after they graduate (e.g. Singapore), generate foreign exchange and employment (e.g. Mauritius), or project soft power (e.g. Qatar) (Healey, 2020). To realise their ambitions to become education hubs, governments have had to encourage inward international provider and programme mobility. In 2009, the UAE was the largest transnational higher education hub, as it was host to 40 IBCs, which represented 25% of all IBCs globally (Becker, 2009). By 2016, China had overtaken the UAE as the largest host of IBCs (Garrett *et al.*, 2016). The other major transnational higher education hubs are Singapore, Malaysia and Qatar.

In recent years, a diverse range of countries have welcomed IBC development, often creating special zones for them. These countries include Armenia, Mauritius, South Korea and Uzbekistan. India is the latest country that is in the process of developing legislation that will allow the establishment of IBCs (Chopra, 2019), and if such legislation is passed, India could become a major host of IBCs. Not only are new IBCs appearing in all corners of the globe, existing providers are also expanding and developing new campuses. In the 2020-2021 academic year, four IBCs in the Emirate of Dubai have relocated, establishing new purpose-built campuses that have increased capacity, namely Heriot-Watt University (UK), Murdoch University (Australia), Rochester Institute of Technology (US), and the University of Wollongong (Australia).

Although the majority of IBCs have less than 1,000 students, the largest IBCs now enrol more than 5,000 students, and several are on track to have more than 10,000 students before 2025. It is the larger IBCs that tend to operate from purpose built campuses that offer superior facilities and resources (see Plate 1). However, for some years, several commentators have questioned whether the IBC model is sustainable (e.g. Altbach and de Wit, 2020; Bothwell, 2019b).

Research on international branch campuses

Altbach and de Wit (2020) suggest that, based on their share of student enrolments, IBCs receive more attention from researchers than they perhaps deserve. However, IBCs are a distinctive, visible and curious organisational form that offer scope for investigation in many different areas, such as institutional strategy; national education policy; teaching and learning; managerial and staffing issues; and quality assurance. To date, the most comprehensive review of published research on IBCs was conducted by Escriva-Beltran *et al.* (2019). They counted 173 publications that are concerned with IBCs. The most popular scholarly journals for full-length peer-reviewed articles are the *Journal of Studies in International Education*; *Higher Education*; *Studies in Higher Education*; *Higher Education Policy*; and *New Directions for Higher Education*.

Other major providers of research on IBCs are the editor-reviewed journal *International Higher Education* and two specialist research organisations: *The Cross-Border Education Research Team* (C-BERT), which operates from the State University of New York at Albany and Pennsylvania State University, and *The Observatory on Borderless Higher Education* (OBHE),

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which was an invaluable source of information for many years, but which appears to have been inactive since 2019.

IBC researchers come from a wide range of countries and discipline backgrounds. Escriba-Beltran *et al.* (2019) cite the most prolific researchers on IBCs as Jane Knight (Canada); Stephen Wilkins (UAE); Jason Lane (US); Nigel Healey (Ireland); Jeroen Huisman (Belgium); and Philip Altbach (US). While these researchers publish a lot of their work as journal articles, it should be noted that much of the research on IBCs is provided in the grey literature, such as reports published by government and regulatory bodies (in source and host countries); higher education institutions; non-governmental organisations; and specialist research organisations. Grey literature often lacks a systematic means of distribution, and it is often confidential/semi-confidential or paywalled, making it often difficult to find and access.

This review draws upon diverse sources of information, which includes both the scholarly and grey literatures. The findings are presented thematically, according to the key objectives and interests of specific stakeholders, namely the institutions that own IBCs, students and host countries. For the institutions, financial performance, internationalisation, status and reputation, altruistic motives and soft power are considered; for students, student experience and satisfaction, quality assurance and employability are considered; and for host countries, knowledge, skills and innovation, as well as quality assurance.

Plate 1. A selection of international branch campuses.



Amity University Dubai



Curtin Singapore



Heriot-Watt University Dubai



James Cook University Singapore

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Lomonosov Moscow State University in Yerevan



Middlesex University Dubai



New York University Abu Dhabi



Stenden University Bali

Note: All photographs were taken by Stephen Wilkins

Institution objectives

In order to assess whether institution and partner objectives have been achieved, it is necessary to first establish the varied objectives of these organisations. Towards the end of the 20th century, higher education became widely accepted as a private good, a commodity that can be freely traded. The General Agreement on Trade in Services (GATS) of the World Trade Organization (WTO) established a regulatory framework for international trade in education and service-related industries, which supported the rise of transnational education. Increasingly, state funding in the global north countries became insufficient to satisfy the investment and expansion objectives of institutions, which encouraged the institutions to seek new sources of revenue (Welch, 2011). At the same time, governments in source countries encouraged institutions to be entrepreneurial and to play a larger role in the global higher education market (Wilkins and Huisman, 2012).

In response to changes in their operating environments, earning profit was the most common motive of institutions that established an IBC before 2010 (Altbach and Knight, 2007; Becker, 2009; Wilkins and Huisman, 2012). Many IBCs are established with a partner that is based in the host country, which typically provides premises, infrastructure, equipment and sometimes even staff. Many of these partners are existing education providers, property developers or investment companies, most of which seek to pursue profit-making opportunities. However, a survey

conducted by Knight (2006) found that some institutions saw IBCs as a means by which they could enhance research, knowledge capacity and cultural understanding.

Although generating a positive financial return is important to some institutions, since 2010, the institutional motives for establishing an IBC have somewhat broadened. Lane (2011) noted that in addition to the desire for new revenue streams, institutions became increasingly driven by activities that could enhance their prestige and educational quality. Some institutions believe that owning an IBC enhances their legitimacy and helps in building a global brand (Farrugia and Lane, 2012; He and Wilkins, 2018). In most countries globally, it has become an expected norm that higher education institutions and their academic staff engage with internationalisation issues (Wilkins and Juusola, 2018). Most institutions nowadays have internationalisation objectives and an internationalisation strategy, which involve international students, student and academic staff mobility, research partnerships, and curricular reforms (Buckner and Stein, 2020). Many institutions have considered an IBC as a convenient vehicle to attain internationalisation goals, which sometimes positions the IBC as an aid project, to support educational development in a developing country.

Financial performance

One of the reasons that motives for establishing an IBC have broadened is that institutions quickly discovered that it is difficult to produce a profit from these campuses (Wilkins, 2017). Many institutions underestimated the set-up costs, and overestimated their ability to attract students (Bothwell, 2019b). For example, in Cyprus, the University of East London recruited just 17 students in its first year of operation (after which it was closed), while the University of Central Lancashire enrolled only 140 students in its first two years (Morgan, 2013). In Mauritius, the University of Wolverhampton closed its IBC after enrolling only 140 students over three years, which was then followed by Aberystwyth University, which closed after enrolling 106 students in its first two years (Bothwell, 2018).

The advice offered by 'expert' consultants and partners in the host country has often influenced institutions' strategic decisions, but research has suggested that both consultants and partners have a tendency to underestimate risks and produce inaccurate and overly optimistic forecasts (Cassidy and Buede, 2009; Shanahan and McParlane, 2005). As a result, most institutions now budget for between 5-10 years to achieve break-even, and until this occurs, the losses can be substantial. For example, the University of Reading opened a campus in Malaysia in 2015, but in 2018 it still made an annual loss of £27 million (Bothwell, 2019a). In 2013, of the eight IBCs in Malaysia, at least half failed to make a profit (Tan, 2015).

To achieve their financial objectives, some IBCs have been very skilful in obtaining financial support and assistance from host country governments and agencies. Lawton and Katsomitros (2012) found that nearly one third of IBCs had received some form of financial support in the host country. At the extreme, some institutions have been lucky in having both their set-up costs and on-going operational expenses fully met by the host country government, such as New York University and Sorbonne University in Abu Dhabi. Institutions that are funded by a host country government or organisation, may avoid incurring debts, but they will not benefit financially from the revenues generated. Funded institutions are typically motivated by reputational and educational benefits. It is likely that some of the specialist business schools produce handsome profits, as their campuses are relatively cheap to establish (because they require minimal equipment and resources) and they can enrol large cohorts paying very high tuition fees. It is almost impossible to obtain precise figures, as most institutions do not publish separate financial accounts for their IBCs.

Host country partners that enter into joint ventures with foreign institutions or that simply provide premises and infrastructure typically anticipate making a financial return. If a profit fails to materialise, or if a partner fears for the viability of a project, then they may terminate the partnership agreement, which is what happened to Middlesex University in India. In this case, the local partner, which constructed and owned the premises, pulled out of the project, leaving Middlesex with losses of US\$7.5m (McGettigan, 2011).

Internationalisation

In the last few years, the educational benefits derived from internationalisation are probably the most common reasons given by institutions for establishing an IBC (Garrett *et al.*, 2016). Given that institutions generally deliver the same programmes at home and branch campuses, academic staff are forced to address cross-cultural issues in programme content and delivery. IBCs may facilitate both student and academic staff mobility, but the truth is that student flows from the IBC to the home campus are generally much higher than in the other direction. For example, Garrett *et al.* (2017) reported that for every ten students going from the University of Nottingham's Ningbo campus in China to the home campus in Nottingham, UK in 2016-2017, only one student came in the opposite direction.

Many institutions consider IBCs to be an important source of international students for the home campus. Often, undergraduate students are offered tuition fee discounts or other incentives if they progress onto graduate study at the home campus. A survey of Chinese IBCs by Mok and Han (2016) found that in all institutions at least half of students who continued their study did so abroad, outside China, and in some institutions the proportion of students going abroad was 90-95%. Although managers and educators frequently talk about the benefits of 'internationalisation at home', in practice, inward student mobility to the home campus is driven by the need to achieve revenue targets. There is little evidence to suggest that student or staff mobility involving IBCs is any higher than mobility using traditional partnerships.

Institution status and reputation

Many institution leaders claim that IBC ownership enhances the institution's global status and reputation. IBCs are frequently used by institutions in marketing communications, to support claims of being a global or world-class university (Siltaoja *et al.*, 2019). However, in practice, different stakeholders may have different views about how owning an IBC impacts upon an institution's status or reputation. Academic staff and students at New York University's home campus likely do not perceive that the institution's campuses in Abu Dhabi and Shanghai have increased the university's status or prestige; rather, these individuals tend to regard these branches as an unnecessary distraction that may divert managerial attention and resources away from the home campus, e.g., by having home campus faculty teach at the IBCs (Wilkins and Huisman, 2012).

On the other hand, awareness about a university among students and employers in its host country may enhance the institution's reputation locally. For example, if it was not for their branch campus, students and employers in Dubai may never have become aware of universities such as Curtin, Heriot-Watt, Middlesex and Wollongong. Even so, unless they had previous first-hand experience with either institution, most high school leavers in Dubai would likely be unable to differentiate between Modul University, from Austria, and Murdoch University, from Australia.

Altruistic motives

IBCs are often established with altruistic motives, particularly with the aim of supporting human development in developing countries. A number of case studies undertaken by Wilkins and Urbanović (2014) found that several institutions had established IBCs to serve home country citizens living in foreign countries (such as Saint-Petersburg State University of ENGECON, which serves Russian-speaking expatriates living in the UAE) or foreign citizens that are ethnically related to the institution's home country (e.g. most of the students at Soochow University of Laos are Lao citizens, but also ethnic Chinese).

While the majority of IBCs teach in English, Russian IBCs teach completely or mostly in Russian, to support the Russian government's Russification policies (Chankseliani, 2020). Monash's IBC in South Africa was originally intended as a for-profit operation, but was later changed to aid project status (McBurnie and Ziguras, 2007). There is plenty of unsatisfied demand for higher education across the African continent, but because average levels of income are very low in many African nations, these countries are not attractive to profit-seeking institutions. Nevertheless, there are at least 13 IBCs located in the African continent (Garrett *et al.*, 2017).

Soft power

Governments worldwide have encouraged higher education institutions to establish IBCs, often as a form of soft power, as a means to build and maintain influence in foreign countries. Although the governments of countries such as China and Russia may be attracted to the idea of soft power gained through higher education, gaining soft power may not actually be a specific or observable objective of institutions (Chankseliani, 2020; He and Wilkins, 2019). However, when for example, the quality of China's education, science and technology is already recognised by citizens in a host country, this can help with student recruitment, and once students are enrolled, soft power influences can be reinforced (He and Wilkins, 2019). Iran is another country that has been keen to use higher education to gain soft power, and it has exported its brand of Shiite Islamism to Africa by targeting influence in minority Muslim communities in Sub-Saharan states (Sawahel, 2018). In terms of student enrolments, with a student body of 1.62 million, Iran's Islamic Azad University is the world's fourth largest university, and it has branches in Afghanistan, Lebanon, the UAE and UK.

Student experience and satisfaction

Students are undoubtedly the main stakeholder in higher education, so no institution can afford to ignore student experience and satisfaction. Given that the vast majority of students at IBCs pay tuition fees, which are often relatively high, it is likely that most students expect an economic return on their outlay, in the form of enhanced employment prospects. Virtually all IBCs conduct student satisfaction surveys and evaluations of courses/programmes, but the results are not available in the public domain. Thus, to assess student experience and satisfaction, it is necessary to review the findings of scholarly research and the audit results of home and host country quality assurance agencies.

The term 'student experience' generally refers to a student's overall interaction with an institution, which includes teaching and learning activities, non-academic support and student life (Wilkins, 2020). Some institutions claim that the student experience is equally excellent at both their home and international campuses. Research on IBC student experience has reached different conclusions. Bhuian (2016) and Shah *et al.* (2010) found that students tended to be less satisfied than their counterparts at the home campuses, while Ahmad (2015), Pieper and Beall (2014), and

Wilkins *et al.* (2012) found that IBC students are generally satisfied with their programmes, teaching, learning resources, academic and non-academic support, and social life. With regard to programme content; lecturer support and interaction with students; facilities; and learning resources, there is sometimes a considerable gap between student expectations and their perceived reality (Yang *et al.*, 2020). The results of home and host country quality assurance audits have also generated mixed results.

Quality assurance

Achieving and maintaining quality standards is one of the key challenges for IBCs (Healey, 2015). IBCs must conform with the regulations and requirements of both home and host country quality assurance agencies. IBCs generally implement similar quality procedures to their home campus counterparts. Some quality assurance agencies make their audit results freely available in the public domain, such as the UK's Quality Assurance Agency for Higher Education (QAA). The QAA publishes both institution and country reports. The QAA concluded in 2014 that only two of the eleven British universities that were operating in the UAE could be recognised as campuses in terms of their infrastructure and facilities (QAA, 2014). Even in Russia, the Ministry of Education has recognised that the quality of education at Russian IBCs varies considerably, and it has vowed to close those campuses that do not improve (Chankseliani, 2020).

It is generally not politically acceptable for IBCs to be financed from home country operations, thus in the medium term IBCs are expected to be self-financing and to at least break-even. Many IBCs have limited financial resources to invest in campus infrastructure, equipment and learning resources, although students nearly always benefit from access to the home campus e-resources, such as the scholarly journals. To minimise costs, some IBCs rely too much on employing locally recruited adjunct faculty, who often lack experience and appropriate qualifications (Wilkins, 2017). Even the IBC managers often lack managerial experience, both in the institution's home country and in transnational education settings (Healey, 2016). To achieve recruitment targets, some IBCs enrol students who would likely not have been accepted onto the same programme at the university's home campus (Altbach, 2010).

Most of the transnational higher education hubs (such as Dubai, Malaysia, Qatar and Singapore) now have quite well-developed quality assurance agencies. In Malaysia, programmes must be approved by the Malaysian Qualifications Agency, while the Ministry of Higher Education must approve an IBC's entry qualifications and tuition fee levels. Programme evaluation is a rigorous process that often takes over one year to complete. In countries such as China, Laos and Malaysia, there are requirements for IBCs to teach certain cultural and/or political courses. In Dubai, the task of assuring IBC quality is undertaken by the Knowledge and Human Development Authority (KHDA). Dubai is the first transnational education hub to publish quality ratings for IBCs.

KHDA's higher education classification system rates IBCs on their teaching, research, employability and internationalisation, and it awards an overall result of one star to five stars, where five stars represents the highest quality. In 2019-2020, six institutions out of the seventeen assessed were awarded five stars (four British IBCs and two Indian IBCs); two were awarded two stars (an Iranian IBC and a Pakistani IBC); and no institutions were awarded only one star (KHDA, 2020). It should be noted that the KHDA has closed a number of institutions in the past, which it judged were of insufficient quality. The results of the current rating scheme suggest that the host country regulator is now broadly satisfied with the quality of IBCs in Dubai.

Knowledge, skills and innovation

The development and marketing of host countries as education hubs has contributed significantly to IBCs' ability to provide education, training, knowledge production and innovation (Knight, 2011). Host countries have welcomed, and even funded, the development of IBCs as a means to increase higher education capacity; address skills shortages in the labour market; reduce 'brain drain', i.e., the emigration of highly trained, qualified and experienced individuals; reduce youth unemployment; and contribute to innovation and knowledge creation. IBCs may, to some extent, have helped host countries to achieve these objectives, although it is difficult to quantify some IBC contributions.

The motivations of transnational education students largely fit within the positional/transformational dimensions, where positional motivation is work or job-related, and transformational is geared towards personal development (Jones, 2019). IBCs offer students the opportunity to improve English skills and gain international and intercultural experiences without studying overseas (Li, 2020). In many cases, students' preference for a transnational education may result from an ingrained structure of perceptions which naturalises the superiority and distinctiveness of certain standards, such as the standards of higher education and innovation in Western countries such as the US and UK, and even China (Sin *et al.*, 2019). Sometimes, such perceptions are reinforced by the perceived weaknesses of domestic higher education providers, which may be known for rigid and insular curricula, rote learning, and a lack of academic freedom. As a result, some IBCs are highly selective and have low acceptance rates. In China, the University of Nottingham typically only recruits students that score in the top 10% in the Gaokao national college entrance examination (Garrett *et al.*, 2017), and in 2019, New York University Abu Dhabi offered a place to only 4% of applicants (Morgan, 2020).

A survey by Mok *et al.* (2018) of Chinese IBC graduates found that the majority of the students perceived that a transnational education had facilitated their career development, and at one IBC, 94% of graduates were in employment within six months of graduation. In a similar survey of IBC students conducted in Malaysia, the students perceived substantial enhancement of their employability skills, particularly the ability to work independently; command of English; adaptability; subject knowledge and expertise; team working skills; and analytical/problem-solving skills (Belderbos, 2019).

A study conducted in Ghana concluded that transnational programmes enhance students' learning experiences through diversified and reflective curricula, highly rated pedagogical approach, and acquisition of knowledge in global business practices (Owusu-Agyeman and Amoakohene, 2020). Mellors-Bourne *et al.* (2015) claim that the majority of IBC graduates globally have achieved some positive employment or career-related outcome, such as gaining a job or progress to further study. Despite the perceived benefits of a transnational education, if personal, financial and family circumstances permitted, many students would rather study abroad, e.g. in the US or UK, than at an IBC, as studying abroad is seen as the 'gold standard' (Sin *et al.*, 2019).

To succeed in the global economy and in international trade, firms need employees with English language competency. Cheong *et al.* (2016) found that employers in Malaysia believed that IBC graduates had the advantage over public university graduates of having more international exposure and a better command of English. Also, a study by Belderbos (2019) concluded that Malaysian IBC graduates are well-equipped with the skills and attributes that employers find most important, particularly soft skills and personal attributes. Many employers, and particularly multinationals, recognise the knowledge and skills that IBC graduates possess. In some years,

RMIT Vietnam has received 50% more internship offers than the number of students seeking an internship (Garrett *et al.*, 2017).

Most IBCs aim to deliver the home campus programmes as closely as possible, but with some degree of customisation, to address the host country and regional contexts (see e.g. Jing *et al.*, 2020). IBC graduates may be highly skilled, but they may not necessarily possess the knowledge and skills needed by the local labour market and host country government, which may be seeking to develop a knowledge and innovation economy (Jones, 2019). In some locations, IBCs offer only a narrow range of subjects. In Dubai, approximately 40% of students at IBCs study business, and there are relatively few programmes in science, engineering and medicine (Wilkins, 2020). The majority of IBCs are small scale operations that focus on teaching rather than research and innovation. However, at many of the larger IBCs, research and scholarly publications are becoming more important. For example, in Qatar, IBCs account for over a quarter of the national scholarly research output (Pohl and Lane, 2018).

Discussion and conclusion

The rate of IBC establishment between 2000 and 2010 was so great that several commentators described the phenomenon as an ‘education gold rush’ (Lewin, 2008). However, citing the challenges of student and staff recruitment, difficulties with replicating the home campus experience, and changing host country conditions, Altbach (2010) claimed that the IBC model may be unsustainable. More recently, Healey (2020) observed a range of factors that may make future IBC development less attractive, such as higher costs, increased home and host country regulation, and increased competition from domestic higher education institutions. Altbach and de Wit (2020) even question the future relevance of IBCs. They suggest that host countries may close more IBCs that fail to satisfy quality standards or requirements; that the sponsors which fund IBCs may reduce or withdraw funding; that there may be more conflict between institutions and host country governments over curriculum requirements and academic freedom; and that stakeholders may increasingly question IBC academic standards and replication of the home campus student experience.

It is difficult to make generalisations about IBCs as they have diverse objectives, ownership structures, modes of operation, and access to financial resources. Undoubtedly, there have been both successes and failures. By 2016, at least 42 IBCs had closed or changed status. A number of universities that had planned to open an IBC later abandoned these plans, which include the universities of Aberdeen, Texas A&M and Warwick (Bothwell, 2019b). However, despite the challenges, institutions continue to establish new IBCs. Examples of IBCs that have opened after 2018 include the University of Birmingham Dubai (UAE), Lancaster University Leipzig (Germany), Peking University HSBC Business School (UK), Texas Tech University-Costa Rica (Costa Rica), and Webster University in Tashkent (Uzbekistan). Interestingly, development flows are no longer primarily from developed to developing countries, but also now from developed to developed (e.g. Lancaster University Leipzig), and developing to developed (e.g. Peking University HSBC Business School).

Some IBCs have failed to achieve their student recruitment and financial targets, while others have been successful, often expanding and moving into new, larger, purpose-built campuses. Such investments suggest that institutions are committed to their IBCs, at least in the medium term, i.e., the next 5-10 years. In the last few years, several countries have announced their intention to become a transnational education hub, or at least to allow the establishment of IBCs. These countries include Egypt, India, Indonesia, the Philippines and Sri Lanka. It may be reasonable to

assume that when there is demand for a product, supply will eventually follow, and so it is unlikely that the IBC model of transnational education will disappear any time soon. Indeed, Lien and Keithley (2020) found that education hub status and a favourable regulatory regime were key drivers of IBC flows.

Assessing the extent to which IBCs are fulfilling institutional objectives is difficult because institutions rarely publish objectives related to their IBCs in the public domain. As the vast majority of IBCs are expected to be self-funding, and many are actually loss making, there are clearly many IBCs that are not achieving their parent's financial targets. The success of some business schools and several of the largest IBCs has indicated that in the long term these overseas ventures can be very lucrative. However, to fulfil ethical expectations, or to satisfy host country requirements, institutions are increasingly reinvesting profit to improve or expand the IBC rather than sending it back to the parent campus.

Most institutions that possess an IBC appear to believe that having physical international operations enhances the institution's status and reputation. Reputation is a very difficult concept to measure, and so no clear-cut conclusions can be drawn from this review. Although IBCs may be a highly visible form of internationalisation, for most institutions, IBCs facilitate fairly modest levels of student and academic staff mobility, except in some cases, for large student flows from the branch to home campus. Although some authors have suggested soft power as a motive for IBC development, in practice, soft power is more the objective of governments rather than institutions, and institutions often support soft power objectives merely by adopting the home country's higher education system and teaching in the home country language.

Wilkins (2013) suggested that IBCs would continue in existence as long as they are attractive and provide benefits to each of the main stakeholder groups (i.e., students, institutions and governments), and as long as the local demand for higher education places exceeds the total supply. The findings of this review suggest that IBC stakeholders still have much to benefit from the existence of IBCs. Clearly, students are a major beneficiary of IBCs, because without these campuses many of these students would be unable to participate in higher education, usually because of insufficient higher education capacity in the host country, but also sometimes because of the subject they want to study, or their level of educational achievement, nationality or socio-economic background (Wilkins and Juusola, 2018).

The cost of studying at an IBC may be considerably less than half the cost of studying overseas as an international student, due to differences in rates of tuition fees, and the need to pay for travel and accommodation when studying abroad. Thus, IBCs may improve access to higher education for lower income groups. Although the quality of transnational education provision may vary, in many host countries, foreign providers are perceived to be higher quality than domestic institutions.

Host country governments generally accept that IBCs may contribute to increasing higher education capacity, satisfying labour market skills needs, reducing youth unemployment, and contributing to knowledge creation and innovation. Thus, on the basis of the literature and data examined, to answer the study's research question, it is concluded that the objectives, needs and expectations of IBC stakeholders are largely satisfied, despite the fact that many IBCs have access to limited financial resources and have the challenge of satisfying diverse student groups with varied needs and wants.

Wilkins (2013) also predicted that future IBCs would take a diverse range of organisational forms, including various types of partnership or collaborative arrangement. Yale-NUS College, a liberal arts college in Singapore, is an example of a partnership between Yale University and the

National University of Singapore. A recent development on the transnational education landscape is the renewed interest in developing networks of global micro-campuses or international study centres, i.e., small-scale foreign campuses. Columbia University has established eight global centres – in locations such as Beijing, Istanbul, Mumbai, Paris, Rio de Janeiro and Santiago – while the University of Arizona has so far opened four micro-campuses. It is likely that, finance permitting, institutions will continue using IBCs as altruistic aid projects. In 2019, with plans to double student enrolments, Carnegie Mellon’s operation in Rwanda moved to a new campus.

In summary, the international higher education market is complex and unpredictable, but all the signals suggest that new IBCs will continue to emerge over the next decade. Undoubtedly, some IBCs will fail, while others continue to grow and thrive, into forms that more closely resemble their home campus counterparts.

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