

# **Institution strategy in transnational higher education: late entrants in mature markets – the case of international branch campuses in the United Arab Emirates**

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## **ABSTRACT**

Market entry timing strategies have been analysed by numerous scholars, but not in the context of higher education. Although there is to some degree consensus on first mover advantages, the research on late entry has been largely inconclusive. Thus, the purpose of this research was to identify and analyse the different positioning and differentiation strategies adopted by late entry institutions to gain a competitive advantage. The sample consisted of seven campuses established by foreign universities in the UAE between 2012 and 2018. Data were collected from sources freely available in the public domain, such as institution websites, promotional materials and press releases, as well as wider media coverage. Applying a content analysis procedure to institution websites, the results revealed that although the communicated identities and strategies adopted by institutions are largely homogenous, they also implement a range of positioning and differentiation strategies. One of the strongest differentiation strategies appears not related to any part of the marketing mix but to the targeted market segment – specifically, targeting students of a specific nationality. The potential advantages for institutions of a global market segmentation strategy are discussed.

## **KEYWORDS**

Transnational higher education; international branch campuses; international strategy; late entrant advantages; differentiation; market positioning

## **Introduction**

Many scholars have researched the concept of first mover advantages (Murray, Ju, & Gao, 2012), a term that refers to the ability of pioneering organisations – the early entrants in a market – to earn superior economic returns. Early market entrants may enjoy a first mover advantage by defining the key characteristics of the product market, securing the best locations and resources, and building relationships with customers and other key stakeholders. On the other hand, latecomers may learn from successes and mistakes of first movers and avoid some of the pressing risks of market entry.

Most existing studies have been concerned with manufacturing firms introducing consumer goods in developed markets (Magnusson, Westjohn, & Boggs, 2009). Researchers have largely ignored market entry timing in service industries such as higher education. One reason for the limited attention is that many higher education ‘industries’ are public and hence strongly state-regulated. This situation, however, has changed considerably in the past decades, with the rise of private higher education in many higher education systems that were previously primarily public. For private higher education providers, early or late entrance (and the profiling of these institutions, see e.g. Teixeira & Amaral, 2001) have become questions of strategic importance.

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A second area where we see quite some dynamics is that of provision in foreign countries. Mimicking to some extent the concept of the multi-national firm, many higher education institutions have set up international branch campuses in countries where markets are growing and/or governments explicitly invite foreign providers to enter the domestic market. With the emergence of international branch campuses in the 1990s and the surge of these campuses since then, one can assume that many of these markets have become saturated (see e.g. Alajoutsijärvi, Juusola, & Lamberg, 2014). This research therefore fills a gap in the literature, as it seeks to determine how late entrants in mature higher education markets may survive, prosper and make sustainable economic returns.

### **The case of the United Arab Emirates**

Our empirical focus is on the strategies of foreign providers that have chosen to set up a branch campus in the densely populated higher education system of the United Arab Emirates (UAE). The UAE has one of the world's most competitive higher education markets; the country has a population of only 9.54 million but there are over 100 licenced higher education providers. At the end of 2017, in Dubai alone, there were 62 higher education institutions in operation, which included 24 international branch campuses (KHDA, 2017). Researchers have claimed that the UAE higher education market is now saturated (e.g. Alajoutsijärvi, Juusola, & Lamberg, 2014; Wilkins, 2010).

Using the UAE higher education market as a case example, the purpose of this research is to (1) identify the different positioning and differentiation strategies adopted by late entry institutions to gain a competitive advantage; and (2) assess the extent to which these positioning and differentiation strategies appear to have been effective in delivering competitive advantage. The sample consisted of seven campuses established by foreign universities in the UAE between 2012 and 2018.

In the following two sections, a concise review of relevant literature on early and late entrant advantages is provided. Then, market positioning and differentiation are considered as strategies that may enable organisations to achieve a competitive advantage. Following this, the results of the study are presented. The section provides a summary of the market positioning and differentiation strategies used by institutions that established branch campuses in the UAE. Finally, explanations of institutional success/failure are offered, as well as recommendations that may be relevant and useful for institutions considering late entry into mature markets.

### **Early entrant advantages and disadvantages**

Much of the early research on timing or order of market entry found that pioneering organisations outperform late entrants in terms of revenue, market share and profit (Shankar, Carpenter, & Krishnamurthi, 1998). Early entrants into a market may develop superior market intelligence; select the favourable geographic locations; acquire scarce input factors; develop a brand that is trusted and attractive to consumers; and, essentially, define the category concept. They often benefit more than late entrants from host country government incentives. For example, reputed foreign universities have accepted the invitation of the governments of Malaysia, Singapore and UAE to establish campuses, offering as incentives land, premises, fast-track accreditation, and in some cases funding (Wilkins, 2016).

Early entrants have a lead in acquiring, developing and adapting the resources, capabilities and competencies needed for sustainable market success (Delios & Makino, 2003). They have more time to learn and acquire local knowledge than late entrants (Murray, Ju, & Gao, 2012). Higher education institutions may both influence and react to student preferences and expectations. The early entrants often possess superior organisational images in the minds of students compared to the late entrants, and this may lead to a favourable reputation in a

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relatively short period of time (Wilkins & Huisman, 2013). Previous studies have found that consumers often have a strong preference for, and loyalty to, early market entrants (Murray, Ju, & Gao, 2012).

Uncertainty is one of the major disadvantages of early market entry. Institutions may have insufficient knowledge about the market structure, local competitors, sector regulation, and the demand for different levels and types of programme (Delios & Makino, 2003). New entrants in international markets may face both the liabilities of newness and foreignness, and due to low student awareness of the institution and the quality of its offerings it may take several years for the institution to break-even. High costs associated with establishing a campus in a foreign country have, in some cases, led to early failure (Wilkins, 2016).

Early entrants in international markets face other risks as well. Higher education institutions may experience changing consumer tastes and preferences; new host country competitors; and changing economic, social, political and regulative conditions (Cui & Lui, 2005). Often, the forecasted student demand does not materialise (Wilkins, 2010). Although early market entry has possible risks and disadvantages, the literature suggests that the advantages of early entry tend to outweigh the possible disadvantages and that early entry organisations often grow faster and make superior returns compared to late entry organisations (Arthur, 1998; Shankar, Carpenter, & Krishnamurthi, 1998). However, first mover advantage does not materialise for every firm in every product market and in every operational context.

First mover advantage has been a popular topic for research among business researchers. Suarez and Lanzolla (2007) identified 839 peer-reviewed journal articles on first mover advantage. First mover advantage theory emerged as a result of empirical studies that focused mainly on two topics: (1) identification of the mechanisms used by first movers to protect themselves from imitative competition, and (2) the firm resources and capabilities that allow organisations to exploit first mover advantage. First mover advantage theory posits that the competitive performance of first movers tends to be better than that of late entrants. Logics from the fields of industrial economics and consumer behaviour have been used to explain the existence of first mover advantage. First mover advantage theory provides the theoretical framework for this research.

### **Late entrant advantages and disadvantages**

The limited research that has investigated the performance of late entrants in international service markets is inconclusive (Magnusson, Westjohn, & Boggs, 2009). Studies on early market entry suggest that early entry is generally advantageous in most markets, but there is less consensus in the literature about whether late entry is necessarily a hindrance to organisations, or the extent to which it can be beneficial. Late entrants face less uncertainty than early entrants because the experiences of the early entrants provide market information for the late entrants (Delios & Makino, 2003). Late entrants can enjoy a ‘free-rider’ advantage, by imitating the successful strategies of early entrants and avoiding and learning from their mistakes and failures (Cui & Lui, 2005). Thus, delaying market entry and adopting a ‘wait and see’ approach can be a prudent strategy for potential late entrants.

Alternative strategies that institutions may adopt to minimise the risks associated with uncertainty are to form a partnership with an organisation based in the host country that possesses local market knowledge and experience, or to undertake extensive market research, perhaps using the services of a specialist consultant. However, previous research has suggested that the judgements of such consultants are often no more accurate than chance (Cassidy & Buede, 2009).

In emerging economies such as the UAE, economic and market reforms have often evolved over time, and therefore the late entrants may be presented with a more favourable operating

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environment than the early entrants. For example, in the UAE, the policies and procedures of regulative organisations such as the Ministry of Higher Education & Scientific Research, the Commission for Academic Accreditation (CAA), and the Knowledge and Human Development Authority (KHDA) were developed largely after 2000. Thus, it is often the case that latecomers enjoy superior market opportunities and fewer uncertainties (Pan, Li, & Tse, 1999).

A major disadvantage of late entry is that the early entrants may secure the best assets and resources (see first mover advantage theory above), and may develop a favourable organisational image that boosts the institution's reputation and attractiveness. Analysing the failures of early entrants can help the late entrant to avoid unsuccessful strategies and to experiment with alternative actions, routines and business models. However, to extract value from early entrant failures, the late entrant must convert its observations into valid explanations and interpretations, which in practice may be very difficult to do (Yang, Li, & Delios, 2015). In other words, a late entrant may not be able to accurately identify the specific reasons for the failures of early entrants.

Late entrants may suffer from liability of smallness, possessing neither the best assets or resources, nor economies of scale (Shamsie, Phelps, & Kuperman, 2004). Thus, organisation size and financial strength may be important determinants of late entrant success, as suggested by resource-based view (RBV) theory. The international branch campus of an elite world-class institution may benefit from a favourable organisational image, which has essentially been derived from the institution's 'home' reputation (He & Wilkins, 2018).

In sum, the literature discussed above shows that there are theoretical arguments for both early and late entry into markets. There is limited insight in how late entrants fare in higher education and the puzzle is further complicated by the fact that higher education is a positional good (Marginson, 2006), which means competition is not only about the price, but also about status and prestige. It is also an experience good (Dill, 1997), which means there is considerable uncertainty about what exactly the returns will be, in the first instance for students, but consequently also for the entrants into the market.

### **Market positioning and differentiation strategies**

Market positioning in higher education is the process through which institutions locate themselves in specific niches within the higher education system (Fumasoli & Lepori, 2011). Positioning reflects the strategic intent of the institution, its capability to locate itself in a favourable niche, and its ability to develop and maintain beneficial relationships with key actors in the higher education system (Fumasoli & Huisman, 2013). The key aim of market positioning is to enable an institution to differentiate itself from competitors in the market (Nicolescu, 2009). Thus, an institution's 'position' refers to how the institution is perceived in the minds of stakeholders (e.g. students, employers and funding agencies), relative to competitors. Stakeholders are able to position an individual institution in the market only when its organisational image is strong and distinctive, and when the stakeholders possess relevant information about the institution, gained through its reputation, personal experience, the media, or word-of-mouth.

Positioning is largely determined by the institution's marketing mix, the components of which include campus location; programmes offered and their specifications; level of tuition fees charged and available financial aid; as well as the institution's marketing communications with students and other stakeholders (Lowry & Owens, 2001). Marketing communications include the institution's branding activities. Institution positioning is achieved by implementing strategies that associate the institution with particular attributes, product features, or user benefits in the minds of consumers. For example, ESMOD-Dubai – an

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institution based in France with a campus in the UAE – positions itself as the institution of choice for students in fashion design.

A higher education institution that fails to adopt a distinct market position and develop a strong and unique organisational image will remain undifferentiated in the minds of students. Mazzarol and Hosie (1996) push this argument, stating that universities in mature/saturated markets must differentiate to achieve a competitive advantage. However, universities tend to have similar missions, objectives and values, and as a result many higher education managers believe that genuine differentiation is difficult to achieve (Chapleo, 2007). Moreover, institutions should still be recognised as a legitimate provider and in that sense *cannot* deviate that much from what key stakeholders would see as a ‘proper’ higher education institution. In other words, there are boundaries to market positioning in that higher education institutions should stay relatively close to what is expected and legitimate in a highly institutionalised organisational field (Mampaey & Huisman, 2016; Quirke, 2013).

Huisman et al. (2002) show that this is a serious challenge for new higher education institutions to be significantly different. It may be a wise strategy (see e.g. Fumasoli & Huisman, 2013) to try to find a balance between being different (unique, niche player, etc.) versus staying in the comfort zone of legitimate action. Mimicking behaviour can be spotted for international branch campuses that claim that they are world-class institutions and/or that they provide world-class education (Siltaoja, Juusola, & Kivijärvi, 2019). To support such claims, these institutions frequently use words such as excellence, reputation and tradition when describing themselves, and they insist that high quality education and a high quality student experience is provided (Beneke, 2011).

The literature on late entry is inconclusive, and, in practice, it is not known what strategy higher education institutions adopt when entering new foreign markets. Hence, we offer two rivalling propositions:

- (1) Because of the perceived risks and disadvantages associated with late entry, international branch campuses will ‘play it safe’ and present fairly *homogenous* identities, with little differentiation in ‘product’ offering and target student population.
- (2) Because the foreign markets that are perceived as most attractive are often mature and already crowded with competitors, international branch campuses will try to be as different as possible and present very *heterogeneous* identities, with clear differentiation in ‘product’ offering and target student population.

### **Institution websites and marketing communications**

Strong institution identities and clear differentiation may help to attract students (Hemsley-Brown & Goonawardana, 2007), although there are signals that legitimacy requirements put a limit to differentiation. Universities are aware that their identities – which represent their key qualities, values and characteristics – influence how they are perceived by students, their parents and other stakeholders such as employers (Melewar & Akel, 2005). Institutions use a variety of methods to communicate their intended identities to stakeholders, but websites are the method most used by universities to inform and persuade students about the institution’s qualities and unique features (Chapleo, Durán, & Díaz, 2011; Gottschall & Saltmarsh, 2016). Thus, this research focused on institution websites as the means by which universities entering the UAE higher education market communicate their positioning and differentiation strategies.

### **Research design**

To identify the positioning and differentiation strategies of the different case institutions, the role of a prospective student was assumed, actively seeking information about each institution with the intention to enrol, where possible, in a broad-based undergraduate business

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programme. The UAE has many higher education institutions that offer business degrees and 39 of these institutions offer an MBA (Wilkins et al., 2018). In 2017, 59.3% of all higher education students in the emirate of Dubai studied business (KHDA, 2018). We refer to the student's overall perceptions of a university as its institutional image. The determined positioning and differentiation strategies of each institution were based on the likely image created by the prospective student based on the information presented to the student in the institution's website. In other words, the researchers attempted to establish the intended institutional identity that each new entrant tries to communicate to prospective students (Chapleo, 2007).

The English language versions of websites were examined, and only text was subjected to the content analysis. First, all general topic web pages were analysed – e.g. about the institution, its vision and mission, vice-chancellor's message, accreditation, campus facilities, university/campus life – and then the page(s) related to one (the most broad/general) undergraduate business programme (civil engineering for Balamand, as this institution does not offer any business programmes).

The content analysis procedure suggested by Krippendorff (2012) was adopted. The unit of analysis was phrases (parts of sentences) or complete sentences, depending on context and intended meaning. Phrases or sentences that contribute to construction of a prospective student's perceived institutional image were individually coded. The analysis was based upon the central message and/or intended meaning of a particular phrase or sentence. For example, if an institution claims that the target programme provides excellent career opportunities and then lists five desirable professions as examples, this would achieve only one count in the content analysis, for excellent 'graduate career prospects'. However, if the institution claims that students can enjoy a variety of extra-curricular activities that include sports, cultural and employment-related activities, this would achieve three counts in 'student experience' as three distinct and different types of activity are mentioned.

The codes represented distinct concepts that were derived from the institution websites, and when these codes could be grouped because of a common purpose or meaning, these groupings became the themes or categories (qualitative dimension of positioning) that were used to present the 'count' results (quantitative dimension of positioning). Table 1 presents the themes that were identified and the key concepts within them. A degree of subjectivity is acknowledged, but the analysis is sufficiently robust to reveal the most significant communalities and differences between the institutions.

Triangulation was used to establish the validity of the content analysis. Information freely available in the public domain, such as hard copy prospectuses, promotional materials and press releases, as well as wider media coverage enabled the researchers to gain additional insights in how institutions attempt to differentiate themselves. Also, one researcher attended a number of institution open days and higher education fairs/exhibitions, typically assuming the role of a prospective student. It could have been relevant to supplement the information obtained with findings from formal interviews, but it turned out that the managers and administrators of the institutions were very reluctant to participate in this study.

### **Strategies of late entrants in the United Arab Emirates**

This section describes the positioning and differentiation strategies that have (and have not) been adopted by institutions that established branch campuses in the UAE between 2012 and 2018. Table 2 shows the word counts for each of the identified themes or categories.

As universities are in the education 'business', it is unsurprising that there was a clear focus on providing messages related to education quality. Some 23.2% of the statements that were considered as communicating institutional identity or characteristics were related to education

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quality. In joint second place, with 16.8% of the counts, were institution reputation – which included messages about accreditations, rankings and external quality assurance – and student experience and support. In the minds of most students, institution reputation is actually more influential than teaching quality because institution reputation is known – through rankings, accreditations and word of mouth etc. – whereas teaching quality is mostly not (Marginson, 2006).

Table 1. Themes and concepts derived from institution websites.

Theme	Concepts derived from institution websites <sup>a</sup>
Education quality	<ul style="list-style-type: none"> <li>• Best lecturers from around the world</li> <li>• Lecturers with global industry experience</li> <li>• Students will be taught by experts in their fields</li> <li>• Institutions and programmes accredited and/or externally quality assured</li> </ul>
Institution reputation	<ul style="list-style-type: none"> <li>• History and heritage</li> <li>• Position in international university rankings</li> <li>• Member of a university mission group, e.g. Russell Group, UK</li> </ul>
Student experience and support	<ul style="list-style-type: none"> <li>• Friendly environment, assisting students in realising their potential</li> <li>• Student clubs and societies</li> <li>• Academic advice and support/ counselling</li> </ul>
Graduate career preparation and prospects	<ul style="list-style-type: none"> <li>• Preparing students for jobs of the future</li> <li>• Programmes have direct input from industry</li> <li>• Practice-oriented programmes</li> <li>• Provide access to internships and graduate employment opportunities</li> <li>• Careers advice and support</li> </ul>
Campus facilities	<ul style="list-style-type: none"> <li>• Recreational facilities, including provision for sports/ fitness</li> <li>• Residential facilities</li> </ul>
Learning environment and resources	<ul style="list-style-type: none"> <li>• Have specialised laboratories</li> <li>• Methods taught and used are in line with current industry standards</li> <li>• Opportunity to take part of the learning programme in a different country</li> </ul>
Campus ownership and institution strength/ experience	<ul style="list-style-type: none"> <li>• Have a strong, dependable UAE-based partner</li> <li>• Independent (no UAE partner)</li> <li>• Institution is large/ has a number of global campuses/ operations</li> </ul>
Subject specialisms	<ul style="list-style-type: none"> <li>• Limited number of faculties/ departments</li> <li>• Long history of teaching a particular subject</li> <li>• Claim to be prestigious in a particular discipline</li> </ul>
From second round of data analysis	
Target students	<ul style="list-style-type: none"> <li>• Country of origin emphasised (i.e. location of the institution's main campus)</li> <li>• Identification of benefits for particular nationalities</li> </ul>

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- Higher education progression in the ‘home country’, i.e. the country in which the university is based
- Emphasis on promoting national/ cultural/ religious values
- Use of non-English languages in websites

<sup>a</sup>Data collected in December 2018.

*Note:* Abasyn University’s campus in Ras Al Khaimah closed in 2017 and since then the institution has not had an operational website in the UAE.

Table 2. Content analysis word count derived from institution websites<sup>a</sup>.

Theme	Amity	Balamand	Birmingham	Curtin	Modul	Synergy	Total mentions	% of identity statements
Education quality	42	13	15	13	23	6	112	23.2%
Institution reputation	22	14	18	7	17	3	81	16.8%
Student experience and support	21	3	22	3	25	7	81	16.8%
Graduate career preparation and prospects	11	6	18	5	12	13	65	13.5%
Campus facilities	28	1	3	5	10	0	47	9.8%
Learning environment and resources	19	2	12	2	7	2	44	9.1%
Campus ownership and strength	6	10	3	5	15	3	42	8.7%
Subject specialisms	3	2	0	1	3	1	10	2.1%
Total number of identity-related statements	152	51	91	41	112	35	482	

<sup>a</sup>The analysis was applied to all general topic web pages e.g. about the institution, its vision and mission, vice-chancellor’s message, accreditation, campus facilities, university/campus life – and the page(s) related to one (most broad, general) undergraduate business programme (engineering for Balamand, as this institution does not offer any business programmes).

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A study conducted by Moogan, Baron, and Harris (1999) supports the assertion that institution reputation is very important to universities, as students in the UK were found to be more influenced by university prestige than measures of programme quality. Most international branch campuses are relatively small operations and thus the overall offerings at these campuses rarely comes close to the home ‘product’, in terms of breadth of curriculum, quality of academic staff, physical environment, learning resources and social facilities (Altbach, 2010). It is interesting therefore to see the sample institutions emphasising student experience and support in their websites.

Naidoo and Jamieson (2005) argue that students have become much more interested in the exchange value of their degree in the labour market. This applies in the UAE, where tuition fees and the general costs of living are relatively high. Students are nowadays more motivated to study at institutions that are likely to offer superior graduate career prospects. This explains why graduate career preparation and prospects was the fourth most common theme found in the sample institution websites.

The quantity of identity-related statements provided in the institution websites varied quite considerably. Amity and Modul offered the highest number of identity-related statements, while Curtin and Synergy offered the lowest number. Being by far the largest institution in terms of student enrolments, it was unsurprising that Amity emphasised its campus facilities and learning environment/resources. At the other extreme, Synergy made no statements about campus facilities and Balamand offered only one statement.

Because of word count restrictions, we singled out five of the eight themes and present findings in more detail.

### ***Education quality***

The purpose of every higher education institution is to facilitate student learning. Very often, reference to high quality academic staff or the acquisition of employability-related skills are used to support the claims of education quality:

“Amity University Dubai is home to the best lecturers from around the world, and many come with global industry experience.” (Amity)

“Excellence in teaching which ensures that the graduates have the knowledge and the professional skills they need.” (Balamand)

Sometimes, education quality is not explicitly mentioned, but is implied through references to holding accreditations or external quality assurance. Interestingly, such achievements typically relate to the institution’s ‘home’ campus rather than its UAE campus, and so some students and parents may regard this information as misleading.

“All undergraduate and postgraduate programs offered at Curtin University are also quality assured by The Tertiary Education Quality and Standards Agency (TEQSA), Australia’s regulatory and quality agency for higher education. TEQSA’s primary aim is to ensure that students receive a high-quality education at any Australian higher education provider.” (Curtin)

### ***Institution reputation***

Superior institution reputation was argued using three main approaches: institutional history and heritage; accreditations; and institutional rankings. Accreditation was mentioned by every institution and three of the six sample institutions made reference to institutional rankings, e.g.:

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“Established by Queen Victoria in 1900, the University of Birmingham is ranked in the top 1% of universities across the globe. We are a member of the elite Russell Group of UK universities, which includes Oxford and Cambridge, and are proud of the work we do to change the world. We bring all of this heritage, prestige, and global renown to our new campus in Dubai.” (Birmingham)

“The only business school that received 6 prestigious accreditations from the international organization Association of MBAs (AMBA).” (Synergy)

At times, some institutions use quotes that are quite broad or bland. For example, Synergy University Dubai’s website claims that the institution is a “time-tested prestigious business school”. As with some of the claims about education quality, some of the statements used to support claims of institutional reputation actually relate to the home campus rather than the UAE campus. An example from the University of Birmingham Dubai’s website:

“11 of our former staff and students have been awarded Nobel Prizes. From revealing the structure of DNA to developing new treatments for heart disease and cancer, the research and work of our Nobel Prize winners has made an impact worldwide.” (Birmingham)

### ***Student experience and support***

“At Amity University Dubai, we place great importance on academics, however we also believe in the importance of nurturing your emotional and physical well-being.” (Amity)

“UOBD believes that learning occurs not only in the classroom, but also through engagement in campus life and in communities and organizations beyond the university. UOBD provides a holistic education that equips the learner with the necessary skills, knowledge, and abilities to build up a bright future for the student personally and for the community.” (Balamand)

Statements such as those above were found in all of the institution websites. In higher education, the product offering extends beyond the academic provision. Student experience may be enhanced through participation in sports, clubs, societies and recreational activities, some of which may also support academic learning and skills development. Clearly, a large institution like Amity, with 2,000 students, can provide a larger range of extra-curricular and support activities than smaller institutions like Balamand, Curtin and Synergy. Even though the smaller institutions may not own their own football or cricket pitches, or indoor facilities for basketball and gymnastics, they still do promote student participation in sports and fitness activities.

“Studying at the university is always accompanied by active student activities. (...) Together with your friends, you will visit a large number of events and places that will forever remain in your memory! Sports at the university is an integral part of student life, actively supported by both students and university staff. You can take part in our sporting events such as basketball, football, beach volleyball and sports running.” (Synergy)

In summary, although it may be assumed that the variety and quality of student experience and support may be related to institutional size – with larger institutions having more resources and

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superior facilities – all institutions appear aware of the need to demonstrate their ability to provide a high quality student experience and appropriate out-of-classroom support.

### ***Campus facilities***

Institutions with good or excellent campus facilities – like Amity – publicise this as much as possible, and institutions like Balamand and Synergy, which have few physical facilities beyond classrooms, a library and basic computing facilities, avoid making statements about campus facilities.

“Our 700,000 square feet campus in Dubai International Academic City boasts top-notch infrastructure that inspires anyone who walks through our doors. From our digital classrooms and high-tech specialised labs in the academic block, to the world-class residential, recreational and fitness facilities, the campus is unmatched by any other in the region.” (Amity)

Interestingly, the University of Birmingham Dubai’s website provided pictures and details about a campus that had only just been approved and which would take two years to build. Little information was provided about the campus at which students will actually study until the new campus opens.

### ***Learning environment and resources***

Amity and Birmingham were the two institutions that offered the most statements related to the learning environment and learning resources. These topics were not completely ignored by any institution, but Balamand, Curtin and Synergy only made two statements each. Modul University emphasised the opportunity for students to study part of their programmes at other Modul campuses outside the UAE.

“To help students gain important practical experience and conduct advanced research, we have specialised laboratories at Amity University Dubai. The work and methods used are in line with current industry standards, ensuring students gain the experience they need to comfortably transition from university to a competitive workplace environment.” (Amity)

“Modul University Dubai campus offers you a unique opportunity to benefit from its rotation programmes with the home campus in Vienna and the Nanjing Campus.” (Modul)

### ***Target students***

Information that was obtained from hard copy prospectuses, promotional materials and externally provided sources such as newspapers, as well as institution open days and higher education fairs/exhibitions provided the means of triangulation to confirm the validity of the content data analysis that had been applied to the institution websites. No conflicting data was observed with regard to the themes derived from the content analysis. However, examination of additional sources of data available in the public domain – particularly media coverage, as well as interpretations of communications with institution staff and observations made at education fairs – suggested an additional theme: the nationality and/or ethnic/religious background of students. Thus, while this research started with adoption of an inductive research approach, a deductive approach was also used as part of the study’s triangulation process.

Media coverage of the opening of Abasyn University’s campus in Ras Al Khaimah made it clear that the Pakistan-based institution would be targeting Pakistani nationals already living in the UAE (e.g., Swan, 2014). Expatriates account for 88.5% of the UAE population, and of

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these individuals, 27.5% are Indian and 12.7% are Pakistani (GMI, 2018). The children of expatriate families living in the UAE generally attend international schools and these often follow the national curriculum of their home country.

Many of the Pakistani expatriates living in the UAE earn only modest salaries, and families cannot afford to send their children to the majority of universities operating in the UAE. Traditionally, this has meant that Pakistani children have had to return to their home country for higher education, or miss out on higher education altogether. Pakistan's Abasyn University recognised the need of Pakistani families living in the UAE to have access to reasonably priced higher education. In order, to minimise operating costs, Abasyn University established its campus in Ras Al Khaimah, rather than the more popular but much more expensive emirates of Dubai or Abu Dhabi. The cost of land and premises, as well as the cost of living, is considerably lower in Ras Al Khaimah compared to the larger emirates and this allowed Abasyn to have among the lowest levels of tuition fees in the UAE. Furthermore, the university provided logical progression for students that followed a Pakistani high school curriculum, and it offered a supportive study atmosphere that respects Islam and Pakistani values. Abasyn University's product offering was clearly attractive to students as its first intake in 2014 had 75 students. However, the regulations in Ras Al Khaimah required Abasyn to possess particular accreditation in Pakistan, which it was unable to obtain, and the UAE campus was forced to close in 2017.

When observing the institution stands at education fairs it was clear that virtually all of the prospective students visiting Amity were Indian or South Asian and those visiting Balamand were Arab. Indeed, staff at the Balamand stand at the Gulf Education and Training Exhibition (GETEX) 2019 confirmed that over 95% of the institution's students are Arab nationals, and approximately half of all students are Lebanese. Lebanon is the country in which the University of Balamand is based.

The newly identified 'student nationality' theme was not obvious in the first round of content analysis of the institution websites because most institutions emphasise that they welcome students of any nationality.

“With more than 50 different nationalities, our campus is truly international.” (Amity)

“Like the United Arab Emirates, which offers a unique mix of nationalities and cultures, the University of Balamand Dubai extends a welcoming environment for all students.” (Balamand)

However, a second round of content analysis, searching specifically for statements relating to student nationality, ethnicity or religion revealed that such statements did in fact exist, but that they were less obvious. Sometimes, the institution identified advantages or benefits that are specific to a particular national group.

“The programme is designed to give students a clear understanding of management concepts and an understanding of doing business internationally. It provides a multi-dimensional focus of study and the student, at a young age, is able to comprehend nuances of business. It also lays a knowledgeable foundation for students who may want to pursue higher education in *India* or internationally.” (Amity)

“Students should be able to... have pride in *Arabic* culture and Islamic values.” (Balamand)

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In the two example statements above, the italics were added by the authors to emphasise that Amity attempts to appeal particularly to Indians, while Balamand targets Arab nationals. Furthermore, Amity University states its programme entry criteria using the Indian CBSE high school qualification. In Synergy University’s website, a section titled ‘Legal information about the university’ is available only in the Russian language, and in the university’s photo and video gallery there is only one picture, which shows two flags displayed on a table – the Russian tricolour and Synergy University’s own red and white logo flag. In conclusion, although the sample universities may welcome students of any nationality, it is clear that some institutions target specific nationalities.

To provide an overview of the results presented in this section, Table 3 shows the identity-related themes most emphasised by institutions in their websites and the differentiation strategies they adopt to compete in the UAE higher education market.

Table 3. Identity-related themes emphasised in institution websites and differentiation strategies of international branch campuses established in the United Arab Emirates after 2010.

Branch Campus Name;	Home Country	Year Established in the UAE	Number of Degree Programmes	Differentiation Strategies	Number of Students <sup>b</sup>
<b>Amity University Dubai</b>  <i>Themes emphasised:</i> Education quality (28%) Campus facilities (18%)	India	2012	32	<ul style="list-style-type: none"> <li>▪ Claims to be India’s top private university and India’s leading research funded university.</li> <li>▪ One of the best campuses of any private university in the UAE, which has high-tech specialised labs and world-class residential, sports and recreational facilities.</li> <li>▪ Programme portfolio includes specialised subjects such as aerospace engineering, nuclear science and forensic science.</li> <li>▪ Caters for the large Indian expatriate community in the UAE, but 40 different nationalities represented among students.</li> <li>▪ Extensive support for career planning and employment.</li> </ul>	2,000

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<p><b>Synergy University Dubai</b></p> <p><i>Theme emphasised:</i> Graduate careers (37%)</p>	Russia	2013	9	<ul style="list-style-type: none"> <li>▪ With more than 35,000 students globally, it is Russia’s largest private university and it is one of the top ranked business schools in Russia.</li> <li>▪ Emphasises graduate careers and employability.</li> <li>▪ Although programmes are taught in English, the university particularly appeals to speakers of Russian.</li> <li>▪ First Russian university to be accredited by the Association of MBAs (AMBA) and it is also accredited by KHDA in Dubai.</li> <li>▪ First business incubator embedded within a university campus in the Middle East.</li> <li>▪ Arranges internships in UAE-based companies.</li> </ul>	140
<p><b>Abasyn University, Ras Al Khaimah Campus</b></p> <p><i>No operational website to analyse</i></p>	Pakistan	2014	7	<ul style="list-style-type: none"> <li>▪ Was located in Ras Al Khaimah rather than Dubai.</li> <li>▪ Offered programmes in business, commerce and computer science.</li> <li>▪ Catered for the large Pakistani expatriate community, including low income families. Also accepted students of any other nationality.</li> <li>▪ Tuition fees, which started at \$4,000 per year, were among the lowest in the UAE and could be paid on a monthly basis.</li> </ul>	Closed in 2017
<p><b>Modul University Dubai</b></p> <p><i>Themes emphasised :</i></p>	Austria	2016	4	<ul style="list-style-type: none"> <li>▪ Programmes focus on Business, Management, Sustainability and Tourism.</li> </ul>	360

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Student experience and support (22%)  
Education quality (21%)

- Students are guaranteed a paid internship in Austria.
- Students can study for one semester at its campuses located in Vienna or Nanjing, China.
- Has identified sustainability as one of its key founding values and principles.
- Reputable founders: Vienna Chamber of Commerce Industry in Austria and Dubai Investments in the UAE, which is the investment arm of the Dubai Government.
- Uses social media extensively for marketing communications.

**Curtin University Dubai**

Australia

2017

7

*Theme emphasised:*  
Education quality (32%)

- International university with campuses in Australia, Malaysia, Mauritius and Singapore.
- Ranked in the top one per cent of universities worldwide in the Academic Ranking of World Universities 2017.
- Emphasises practical learning and industry connections, e.g. finance students use an online trading platform that gives them a live view of the stock market.
- Targets mature age students; runs sessions to provide friendly and helpful guidance to mature age prospective students.
- Competitive tuition fees. At US\$11,000 per year, one of the cheapest Western universities in the UAE.

200

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<p><b>University of Balamand Dubai</b></p> <p><i>Themes emphasised:</i> Institution reputation (27%) Education quality (25%) Campus ownership (20%)</p>	Lebanon	2018	6	<ul style="list-style-type: none"> <li>▪ Specialises in science and engineering programmes.</li> <li>▪ Undergraduate degrees based on American model of higher education.</li> <li>▪ Targets Arab nationals. Approximately half of students are Lebanese.</li> <li>▪ Dubai Investments, the investment arm of the Dubai Government, is the UAE-based partner, thus providing financial security.</li> <li>▪ Accredited by the UAE Commission for Academic Accreditation (CAA).</li> </ul>	100
<p><b>University of Birmingham Dubai</b></p> <p><i>Themes emphasised:</i> Student experience and support (24%) Institution reputation (20%) Graduate careers (20%)</p>	United Kingdom	2018	9	<ul style="list-style-type: none"> <li>▪ Emphasises status as the first 'global top 100' university and Russell Group member to establish a campus in Dubai.</li> <li>▪ Emphasises student experience and support.</li> <li>▪ Emphasises graduate careers and employability.</li> <li>▪ No local investment partner; campus is owned, managed and operated by the University.</li> <li>▪ Entry requirements and tuition fees in the UAE same as in the UK.</li> <li>▪ Recruits students internationally, including in China and Mauritius.</li> </ul>	160

<sup>a</sup>Identity-related statements associated with a particular theme as a percentage of the institution's total identity-related statements.

<sup>b</sup>Registered students in the 2018-19 academic year.

*Note:* Abasyn University's campus in Ras Al Khaimah closed in 2017 and since then the institution has not had an operational website in the UAE. Data presented in this table were obtained from various sources in the public domain, e.g. press releases and media coverage.



## Discussion and conclusion

The purpose of this research was to identify the different positioning and differentiation strategies adopted by institutions to gain a competitive advantage, and to assess the extent to which these positioning and differentiation strategies appear to have been effective in delivering competitive advantage. Specifically, we were interested to discover the degree of homogeneity or heterogeneity in the communicated identities of international branch campuses, their ‘product’ offerings and target student populations. In terms of our two rivalling propositions, it may be concluded that the reality is somewhere between the two stated extremes. Given that the UAE higher education market is mature and very competitive it was to some extent surprising not to witness more product differentiation in terms of study disciplines and subjects offered.

With the exception of Synergy University, which did not mention campus facilities, each institution addressed each of the eight themes (see Tables 1 and 2), admittedly stressing some themes more than others. This finding indicates the homogenous approach adopted by institutions to communicate their intended identities. Despite similarities in institution strategies – e.g. focusing on business/vocational programmes and emphasising graduate prospects and employability – the seven case institutions do also implement a range of different positioning and differentiation strategies.

Due to previous campus failures, most institutions attempt to reassure students and parents about the institution’s stability and ability to deliver high quality programmes to completion by emphasising their size or financially-strong UAE-based partners. The University of Birmingham is alone in emphasising that it is completely independent and does not have a UAE-based partner. Student experience and support are other things that every institution mentions in their website and promotional literature. In many start-ups, the liability of smallness may hinder institutional competitiveness, which result from the institution possessing fewer resources, capabilities and economies of scale (Yang, Li, & Delios, 2015). Although it appears that operational scale is related to student experience and support outside of the classroom, some institutions have still found ways to differentiate themselves.

Next to these similarities, several institutions attempt to differentiate themselves by emphasising their heritage, reputation or positions in rankings. As there are no domestic rankings in the UAE, students in this country have been less exposed to rankings and some individuals may be easily misled or deceived by inaccurate or exaggerated claims about rankings, accreditation or reputation. Some of the institutions appear to make claims about quality without providing substantial detail, which may make it difficult for potential students to make reasoned judgements. Students often avoid institutions that do not have an attractive and well-resourced campus. Amity invested the most in physical infrastructure and Amity has by far the largest student population.

One of the most effective differentiation strategies appears to be unrelated to any part of the marketing mix, but rather to the *targeted market* segment. Amity, with 2,000 students and the largest of the late entrants, targets Indian expatriates living in the UAE. As Amity is widely regarded as India’s top private university, students may believe that when they return to India an Amity degree will give them a competitive advantage in the labour market. Amity is not the first Indian university in Dubai to target Indian/South Asian students, as some of the largest branch campuses already operating in Dubai are Indian institutions following the same strategy, e.g. Birla Institute of Technology and Science, Pilani - Dubai Campus (established in 2000); Manipal University, Dubai (established in 2000); and The Institute of Management Technology, Dubai (established in 2006).

Abasyn University targeted Pakistani students living in the UAE, and locating in Ras Al Khaimah rather than Dubai or Abu Dhabi allowed Abasyn to have among the lowest levels of

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tuition fees in the UAE. Its strategy of targeting Pakistani nationals appears to have been successful until the institution was closed because of an accreditation issue in Pakistan. In 2013, Synergy University, Russia's largest private university and one of the top ranked business schools in Russia, established a campus in Dubai. All programmes are taught in English and although there is little evidence that Synergy has been targeting the 10,000 Russian nationals living in the UAE or the 55,000 Russian speakers from the Commonwealth of Independent States (the former Soviet republics), these two groups do account for a high proportion of student enrolments at the university.

More recently, Balamand University, from Lebanon, started operations at its Dubai campus in September 2018. There are few international branch campuses in the UAE originating from another Arab country, so it is expected that University of Balamand's Dubai campus will be popular with both Emiratis and Arab national expatriates. If the effectiveness of an institution's positioning and differentiation strategies are judged using the number of students enrolled, then Amity's strategy of targeting Indian/Asian students to a diverse range of (sometimes specialised) programmes in a purpose-built campus appears to be the most successful strategy/marketing mix.

First mover advantage theory provided a useful theoretical frame for this study, and the findings of this research support the notion that late entrants may enjoy superior competitive performance as well as early entrants. However useful, the findings did not offer unambiguous support for one of the rivalling propositions. The key practical implication for institutions highlighted by this research is that by focusing on a specific target customer and implementing a global market segmentation strategy, a stronger and more distinctive organisational identity may be developed. In fact, the benefit of market segmentation is that a higher education institution can still very much build on the traditional – strongly institutionalised and legitimised – model of higher education institutions, circumventing some of the challenges of liabilities of newness.

Global market segmentation is based on the characteristics of individual consumer groups that share similar attributes and who are likely to share similar buying behaviours (Hassan & Craft, 2005). Potential benefits of a global market segmentation strategy include increased opportunities to transfer products, brands and ideas across campuses in different countries; improved institution branding; and cost efficiencies. To achieve a sustainable competitive advantage in foreign markets, institutions should each identify their particular niche; establish long-term goals; and align their actions to achieve these goals, all the time adapting to changes in the external environment (Fumasoli & Lepori, 2011). Therefore, the institution's strategic positioning should be the result of both purposeful institutional actions and environmental circumstances (Fumasoli & Huisman, 2013). Among new entrants in a market, institutions that have previous experience in international markets – such as Amity and Curtin – may have a competitive advantage in that they can repeat successful strategies and avoid the unsuccessful strategies.

This research is not without limitations. Whereas the findings resonate with studies that focus on identity, image and positioning in higher education (see e.g. Huisman & Mampaey, 2018; Lowry & Owens, 2001; Steiner, Sundström, & Sammalisto, 2013; Wilkins & Huisman, 2013), it should be recognised that in different countries institutions are exposed to different environmental conditions. The study was conducted in only one market and with a sample of seven institutions; therefore, the results are not generalisable to all mature higher education markets. However, this provides an opportunity for replication studies to be undertaken, which may in future support the generalisability of this study's findings. Although the content analysis approach used in this study was effective in helping identify the different positioning and differentiation strategies used by late entry institutions in the UAE, future studies may adopt

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alternative methods, such as multimedia/visual text analysis (see e.g. Gottschall & Saltmarsh, 2016), which may provide richer data for analysis of things such as student experience or institution attractiveness.

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