

Kleibert, Jana M.; Rottlieb, Tim; Schulze, Marc; Bobée, Alice

Research Report

Strategy first: Ten questions to answer before starting an international campus

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Policy Paper

Jana M. Kleibert, Tim Rottlieb, Marc Schulze, Alice Bobée

Strategy First: Ten Questions to Answer before Starting an International Campus



Leibniz-Institut für
Raumbezogene Sozialforschung

Strategy First: Ten Questions to Answer before Starting an International Campus

Authors: Jana M. Kleibert, Tim Rottlieb, Marc Schulze, Alice Bobée

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Executive Summary

The report is intended for senior managers and decision-makers of internationalisation strategies at higher education institutions around the world, and organisations that are involved in consulting, advertisement and support of the internationalisation of higher education. Based upon 136 qualitative interviews with senior higher-education managers and transnational education stakeholders in Europe, Asia and the Middle East conducted between 2018 and 2020, we develop recommendations for developing strategies and avoiding risks in offshore campus development.

The report:

(1) Discusses the key challenges for international campus developments. It reveals lessons to be learned from failures.

(2) Systematically discusses the six most common risks for offshore campuses; including a lack of institutional strategy, financial and reputational risks as well as risks relating to peripheral locations, risky partnerships, and changing regulations in host environments.

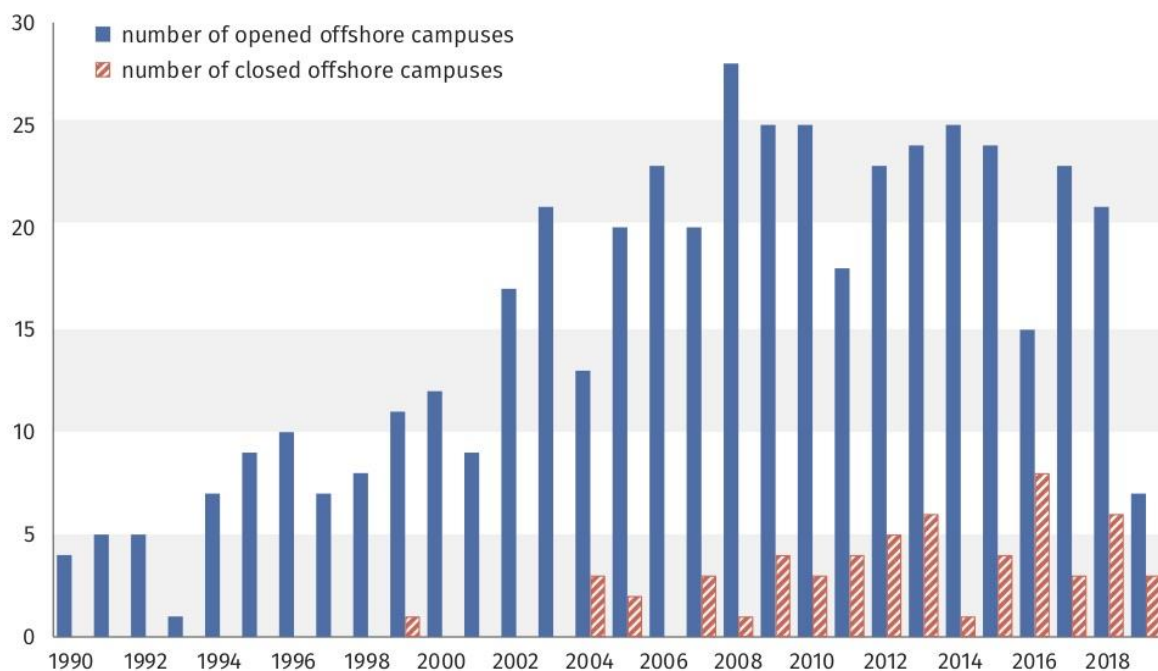
(3) Develops risk mitigation strategies on the basis of a ten-question checklist.

Unrealised Ambitions and Campus Closures

“There are some horror stories out there that we kind of pick up on [...] There are many universities who have gone on very, very ambitious schemes and establishing big campuses very expensively. And we feel from the intelligence we pick up, that quite a few of them do not make any money. And quite a few of them have actually cost the universities significant sums of money [...] So, I guess it depends on the risk appetite of different universities, and also, I think sometimes the naivety of universities as they approach different markets. You know? They naturally seem that it is all going to go fantastically well, they put down millions into those markets and then perhaps realize it is not going quite so well as they hoped” (Interview Pro-Vice Chancellor, UK)

Our data show a paradox: offshore campuses, defined as transnational education involving physical presences of universities that deliver international degrees in another country, have grown strongly and amount to almost 500 campuses globally (Kleibert et al., 2020a). Simultaneously, we see how offshore campuses have closed every year over the past 15 years. Several cases of failed investments have been prominently covered in the news, for instance [University of New South Wales pulled out of Singapore just four months after its opening](#).

Figure 1: Offshore Campus Closures



(Source: Kleibert et al., 2020a: 17)

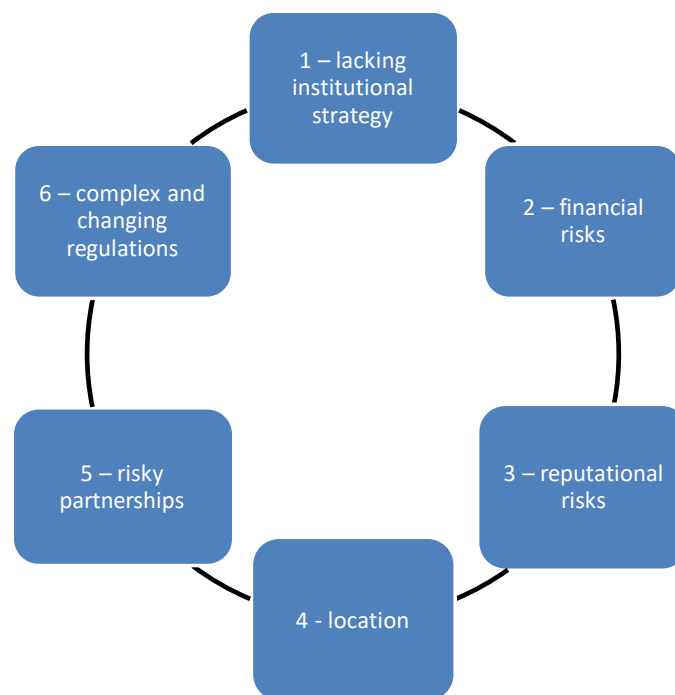
The reasons for campus closures are diverse; some may have been set up with a limited time frame of existence planned from the start. Moreover, our research shows that many offshore campus projects were planned but were cancelled prior to starting their operations. These ‘ghost’ campuses, proudly announced in newspaper reports on the web but never materialised, will have cost the universities significant sums of time and money at the planning stage, while ultimately failing to take off. These closures and cancelled projects may only be the visible top of an iceberg in the water, with

many more campuses experiencing fundamental problems in their day-to-day operations and challenges to realise their ambitions. The difficulties inherent in offshore campus development as a particular form of internationalisation of higher education are manifold.

The academic community acknowledges the risks of offshore campus development, which often involves sizeable investments of time and financial resources in non-core activities. Higher education scholars have argued that international branch campus development is a “high-risk growth strategy and unsuccessful ventures can result in huge financial losses and reputational consequences” (Wilkins and Huismans, 2012: 628; see also Altbach, 2015).

Based on our discussions with 136 senior higher education managers and transnational education stakeholders in Europe, Southeast Asia and the Middle East held between 2018 and 2020, we analyse the six most important risks for offshore campuses. These include a lack of institutional strategy, financial and reputational risks as well as risks relating to peripheral locations, risky partnerships, and changing regulations in host environments. By learning from cases around the world, we hope to develop ideas on how to assess and mitigate risks and develop more sustainable campuses in the future. We conclude with a checklist of ten questions to ask prior to starting a branch campus.

Figure 2: Predominant Risks of Offshore Campus Development



1. Lacking Strategy

How is the decision to open a campus taken and by whom? A central and somewhat surprising issue during our interviews has been the overall lack of strategy for the development of offshore campuses by many institutions across geographies. Rather than resulting from a carefully planned overarching strategy of the university, offshore campus projects and openings often resulted from a moment of opportunity or personal interest of a few individual decision-makers and ad hoc decision-making. Respondents often expressed the fact that “chance” or “serendipity” guided the decision to set up an offshore campus. When asked to elaborate, offshore campus managers were usually contacted by

governments or private business partners, sometimes chaired by former alumni, who “invited” universities to come in and develop offshore campuses. In these examples, it is thus actors in host countries who act strategically, while decision-makers at universities are simply in the position to follow their guide and make situational decisions based on individual “opportunities” instead of developing own coherent strategies. A key question is whether the campus fulfils more than one strategic objective of the institution - and whether this objective can be reached without the establishment of an offshore campus and its associated financial and reputational risks.

As one example of many, a respondent told us about how he became vice president at a higher education institution with four branch campuses. During his job interview, he asked about the institutional strategy driving the development of those four campuses. To his surprise, those sitting in front of him could not provide any answer: “I did not get an answer, because they did not have one. These four branch campuses arose more or less out of a request by the overseas partner.” Often, these projects are then retrofitted into a strategy and are then starting to guide decisions at the university more broadly, such as focus areas for research. It is thus important to choose a region which is relevant for the strategic engagement of the university beyond the opportunity to broaden the student market. Whether the region is relevant for faculty for international collaborations, the ability to conduct research projects, or for domestic students to study abroad will be important factors in whether the offshore campus receives the buy-in and commitment of faculty and students and does not remain an isolated project by the President of the University. In order to gauge the interest and willingness of faculty and students to support the project, a consultation process with stakeholders needs to be organised that goes beyond marketing top-down decisions.

Often, offshore campuses are perceived to be the [personal projects championed by a single powerful individual](#), usually the (Vice-) President of the University. Without the commitment of the individuals who are involved in the day-to-day operations and the broader academic community, the frictions caused by integrating new campuses into the university structure may be significant and may jeopardise the entire project. A second problem arises for the future of the offshore campus when the single backers of offshore campuses retire or leave the institution. Thus, even if a personal relationship between two powerful individuals forms the basis for the offshore campus, it is important to institutionalise these relationships and develop longer-term strategies of these campuses that enable them to exist independently from their founders.

2. Financial Risks

A major risk that most respondents were keenly aware of, is the financial risk involved in setting up offshore campuses. The University of Reading is still continuing its Malaysian campus but has incurred [financial losses for its overseas campus of GBP 27 million in the academic year 2017/2018](#). However, financial losses rather than financial gains are the result of many offshore campuses. An offshore campus manager in Malaysia explains that they find themselves in a *Red Ocean*, “which means we're all bleeding, everybody's losing money.”

The key issue is understanding the domestic market and having a realistic expectation of student demand. In many cases, offshore campuses close due to only very limited numbers of student enrolment in the first years. Campuses that are not funded by host governments but depend entirely for their financial viability on tuition fees will not be able to sustain themselves if only few students enrol. A certain overestimation of the brand value of their own institutions in a different market,

highly optimistic estimations for student demand supplied by domestic government and business stakeholders and simply a suboptimal choice of study programmes can together lead to a lower-than-expected student turnout. A second issue is the proper calculation of the actual working time (and thus salary costs) of all staff involved in the offshore campus operations. Several interviewees stated that they underestimated the extensive and ongoing effort required for operating an offshore campus, including by very senior management staff.

The manager of a French offshore told us about the failure of a campus established in the Maghreb. The campus was initiated by a local partner and by the French institution's director. Certain that the French image would carry a positive value in a post-colonial context, they did not conduct any market study before opening the campus. In the first year only nine students enrolled, which resulted in financial losses and campus closure. This story does not only emphasise the importance to decolonise thinking when planning offshore campuses. It also shows how crucial it is to take seriously the quality of higher education that needs to be delivered to the students, students' demands and the domestic higher education context *before* opening a campus.

This could for example mean to conduct an independent business study that takes account of existing higher education institutions and identifies unique selling points of the programmes of the offshore campus - rather than simply relying on reputational brand value in home markets. An offshore campus manager argued that building relations and reputation in a new environment requires time: "It takes a lot of time to get established in a certain country because it's not that you open up a campus and then the country, the local higher education landscape, [is] gonna open its arms and say 'Oh yeah, welcome, you're a partner of our higher education community.'" Offshore campuses may take a decade to reach break-even point and thus constitute long-term investments that require sufficient time to deliver returns and require capital to sustain themselves until that moment.

A [trade-off between quality and financial risks](#) seem to exist for transnational education operations, and which side the balance swings depends on the type of transnational education model. If the university invests into a fully-owned campus and controls all operations, financial risks are higher but the loss of (quality) control is diminished. In models where the university is partnering with another institution and only delivers the curriculum and quality assurance, but is not engaged in facilities management, recruitment or teaching, financial risks are much lower. An education industry observer from the UK explains: "If you are just rubber-stamping a qualification that is essentially delivered by another college or many other colleges around the world, it is much cheaper to run, much wider audience, but there's a much higher [quality] risk, because you have much less control." Thus, we turn to the issue of reputational risks.

3. Reputational Risks

The loss of reputation can easily tarnish the reputation of the entire higher education institution and thus affect the "brand value" of an institution, also in the home country. There are several different issues that affect reputation. The first is related to the offshore campus model itself. In media portraits offshore campuses are often portrayed as a symbol of marketised higher education that puts money before all else. Both the opening and closure put higher education institutions in the media spotlight, and particularly the latter can affect the institutions' reputation as it tends to be associated with managerial failure.

Much academic and practice-oriented debate focuses on *quality assurance* to prevent reputational damage from lower-quality degrees and safeguard academic standards. [Large reputational risks](#) loom in case the quality of degrees awarded abroad (sometimes only under the brand name of the university, usually without indication to the place in which these were attained) is considered to be too low. Poor quality degrees may “dilute the brand”, in the words of one of our respondents. Thus, having strong quality assurance processes in place are required to not lead to degree inflation.

However, reputational risks exist beyond narrowly defined criteria of teaching and examination “quality”. They also concern thorny political issues over *academic freedom*. Many international branch campuses are situated in and have been established with financial aid from non-democratic governments. University managers should not underestimate the negative effect of decisions to open offshore campuses in countries which are known for human rights abuses and are low-ranking in the [Academic Freedom Index](#). Given that offshore campuses overwhelmingly exist in countries with low track-records on academic freedom, including China, the United Arab Emirates, Qatar and Singapore, difficult discussions will occur in negotiating what is possible in a given environment.

Independent from the outcome of these discussions on campuses in situ, the mere fact to operate campuses in these countries will most definitely lead to criticism by the home universities’ faculty and students. In a recent open letter, academics have called for a suspension of branch campus projects in Egypt until (academic) freedoms are protected, stating: “We are also deeply concerned that once again, UK universities are showing their willingness to put potential revenue from student fees before commitment to human rights and academic freedoms, by pursuing partnerships with private educational firms running ‘branch campuses’ or offering UK degrees in Egypt” (E-mail via LSE Listserv Mail on 4 October 2019). Similarly, when a philosopher recruited to teach at the Sorbonne’s offshore campus in Abu Dhabi was dismissed in the last moment, following a refusal from the Emirati authorities to approve her visa, an open letter, signed by 135 academics, asked “Should this cooperation be pursued [at the cost of academic freedom and university independence?](#)”. Depending on their voice within decision-making processes, the [protests and objections of staff and students](#) can even lead to the cancellation of plans to open a campus as occurred with the planned University of Groningen’s campus in Yantai, China.

4. Location, Location, Location

Another risk, which is of particular interest for us as geographers, comes with the concrete geographical location of the offshore campus. The location choice of campuses by campus managers often reflects the overall goal of being located within a particular region. Respondents in Malaysia, for instance, argued their location choice was based on their wish to “be located in a region of three billion people”, thus counting the entire populations of India and China as being within reach. Similarly, offshore campus managers in Dubai were less aiming to recruit students from the emirate itself but rather recruit international students from a larger region. As an offshore campus manager in Dubai explains “Our strategic decision to go somewhere and open the campus has just a little to do with the [local] market. We do not recruit too many people from Dubai [...], the [United Arab Emirates] in general.”

The viability of visions of accessing a greater region and its students depends on whether international students can actually be attracted to offshore campuses. International student recruitment depends fundamentally on immigration regimes in host countries, several of which are

highly restrictive. Singapore, for instance, restricts the enrolment of international students by offshore campuses unless they undergo special accreditation by the Ministry of Education through its EduTrust programme. Campus managers operating in different contexts expressed their concerns with visa restrictions for international students that hampered their business models.

Many offshore campuses are located within “transnational education zones” (Kleibert et al., 2020b) which are specifically designed to host a larger number of offshore campuses and provide shared infrastructure for their operations in dedicated zones. Examples of such education zones are Education City in Qatar, Dubai International Academic City in the United Arab Emirates, or EduCity in Malaysia. These planned higher education hubs have the advantage of increasing visibility and branding of higher education institutions, but they also come with the downside of heightened competition. If offshore campuses offer their degrees door-to-door from each other, this may create a situation where many institutions compete for the same students. Rather than the hoped-for collaboration between different higher education institutions co-locating within a zone, the reality more often seems to be competition. Some education zones, however, are carefully curated by governments to make sure universities offer different disciplines and degrees (offshore campuses in Qatar, for instance, specialise in medicine or journalism), thus avoiding competition between providers. In some cases, restrictions such as the existence of “exclusivity clauses” for teaching only in certain narrow fields, as applied in the case of EduCity in Iskandar Malaysia, can diminish the number of potential students.

A crucial decision is the location and connectivity of the campus vis-à-vis urban amenities. Specifically designed transnational education zones are often established as Greenfield investments in rather peripheral and sometimes remote locations. This presents not only challenges for student recruitment but also for developing further linkages with actors in the city-region. In particular international business schools are keen to be located within central business districts. One respondent explained their location choice outside of Qatar’s Education City: “It made more sense to be in the centre of the business district and not in the remote location outside of Doha, which is in the middle of the desert.” Some of our respondents relocated after an initial period. The manager of a campus initially located in Dubai International Academic City argued that they moved to the more centrally located Dubai Knowledge Park in order to improve the ability to collaborate: “We want to work far more closer with [the] industry and with the professional communities. Obviously, it’s a much more urban environment in there and it’s also at the right side of the town.” Whether campuses are perceived to be “on the right side of town” or peripheral by local actors, whether they are accessible via (existing and not simply to be built) public transportation and whether they offer relevant urban amenities are critical factors for the viability of a campus development.

5. Risky Partnerships

Host government regulations determine whether universities are allowed to set up independently run campuses or whether partnerships with domestic actors are obliged. In China, foreign universities always form joint-ventures with domestic higher education institutions, for instance the Xi’an Jiaotong-Liverpool University (XJTLU) campus. Similarly, Malaysian regulations limited foreign ownership in higher education until 2015, initially stipulating a limit of 49 per cent, thus effectively requiring all universities that set up offshore campuses to have domestic partners. Often, these partnerships are not visible in the names of the offshore campuses and the partners do not stem

from the field of higher education but are private or government-linked conglomerates. The University of Nottingham's large campus in Semenyih is in fact a joint venture with Boustead Holdings, which engages in a range of activities, including plantations, real estate or weaponry. These kind of partnerships do not only raise questions about the offshore campus project's legitimacy but also about the partner's lasting support of transnational education operations if they do not pay off immediately.

In other cases, close partnerships with local government actors might be necessary to get access to financial resources. In Qatar, those foreign universities selected by Qatar Foundation for full funding and a location in the expensive infrastructure of Education City are assigned the status of "partner university" and become closely integrated in Qatar's political developmental agenda. Partners from the field of higher education can support the recruitment of students and the localisation of foreign degrees. On the downside, the sending institutions are less able to act independently and may be asked to accept different standards of academic freedom. Commercial partners tend to be less involved in the content of the programmes and can minimise financial risks, but their financial interests in the worst case may lower quality in order to increase student numbers and thus profits. It makes sense to not only differentiate between campuses that are independently run and those with partners, but also to weigh the benefits and limitations that different types of partners bring to the partnership. In the case of commercial partners, a due-diligence check should be conducted prior to signing the partnership.

6. Complex and Changing Regulations

Higher education is a highly regulated field in most countries and often involves many stakeholders and regulations. The key issue most offshore campus managers immediately think about is the regulation and accreditation procedure for foreign degrees. The many ways in which foreign degrees at offshore campuses are regulated depend on host country and country of origin accreditation bodies and policies, leading to overlapping regulatory frameworks. As a result, challenges exist around the different regulation of quality assurance and degree accreditation (Hou et al., 2018). Our respondents argued that in many cases, high workloads resulted from the requirement to satisfy two regulators. The manager of an Australian offshore campus in Dubai explains that they have to report both to the Australian higher education quality assurance organisation TEQSA, as well as Dubai's Knowledge and Human Development Authority: "So it means in some cases reporting the same data to two different regulators, but in different cycles and in different formats."

But higher education regulation is not the only policy field that impacts offshore campuses. Rules for foreign direct investment and ownership (see Schulze, 2021), including on the ability to transfer profits, apply as well. Moreover, labour laws and immigration policies are critical to the operation of campuses that do apply international faculty and students. A respondent from Singapore argued that "We deal with a lot of visa rejections for student passes. That's a challenge [... also for] our students who do an internship [and require] a training work permit, which is a special work pass for interns." In the United Arab Emirates, a respondent explains that "The government has announced longer-duration visas for certain profiles with academic credentials, typically medical doctors, engineers, professors. But still, although those are longer-term visas, they can still terminate your visa anytime they want at any point in time. [...] If you're no longer wanted, it makes no difference whether you're on a two-year or 10-year visa." Being knowledgeable and aware of all relevant regulations across

policy fields is essential. Importantly, however, these frameworks are not static but are subject to (sometimes very fast) change. The Singaporean government has changed the regulation of its offshore campuses several times, as an offshore campus manager with a longer experience at the campus has seen: “At first, they brought in their enhanced registration framework, so then you had to get certification to be a school. Before 2010 that wasn't necessary. Shortly after that, they tightened regulations again and brought in EduTrust. The EduTrust framework is quite a stringent audit and you have to have this to recruit international students.” Continuously adapting to changing regulations and shifting responsibilities on different administrative levels in the host country may also entail further risks and additional costs for the offshore campus.

Also, entire political frameworks can change. In the United Arab Emirates, for example, there are continued discussions about a more unified federal accreditation system, which is currently still organised on the emirate, sub-national, level. Changes in the accreditation system would have consequences for the programme design of most offshore campuses in the United Arab Emirates. Finally, changes of government or its strategic orientation can also bring about changes in the political will to honour existing agreements, which can entail reviewing and re-negotiating financial subsidies granted to offshore campuses.

How to Avoid Failure?

Many higher education institutions find themselves in a squeeze. Home governments have over time reduced the funding of higher education and have made higher education providers responsible for generating sufficient revenues for supporting their core function of research and teaching through competing for funds on different markets. This has in many instances led to an increased dependency on tuition fees by international students, a situation we commonly know from neoliberal higher education systems (such as Australia, the United Kingdom, the United States) but can increasingly be observed in other national contexts as well, such as France. In Australia, international students' tuition fees are essentially subsidising core activities, including research. This makes higher education institutions dependent upon volatile flows of income, which are easily unsettled by shifting demands from students, (geo-)political conflicts, more restrictive migration policies or restrictions on international mobility. Brexit has presented uncertainty and financial pressures on the British higher education system (Kleibert, 2020), whereas the repercussions of the Covid-19 pandemic are still unfolding. It seems clear that actors in more neoliberal higher education systems are more vulnerable to sudden changes. In these situations, offshore campuses may seem like a “fix” to temporary problems. We urge to not jump into these projects without planning ahead and developing a strategic, thought-through, long-term response. Otherwise, the solution may turn into the problem.

We developed a simple ten-question checklist to alert to the potential risks identified above. We believe that seriously considering these questions may serve as a broad orientation for developing risk-mitigation strategies prior to opening an international campus.

Checklist:

10 Questions to Answer before Starting an Offshore Campus

	yes	no
1 Does the campus fulfil more than one strategic objective of the institution?		
2 Is the region that the branch campus is located in relevant for strategic engagement of the university (e.g. for faculty conducting research-projects, for students to study abroad)?		
3 Has there been a consultation process and broad buy-in from stakeholders who will be impacted by the development, including faculty and students?		
4 Has independent market research on potential student demand been carried out (not relying on data provided by the partner institution/host government)?		
5 Have you researched your competitors and realistically identified your unique selling point in the new higher education system (e.g. subject-specific expertise, reputational value of your institution abroad)?		
6 If a partner organisation is involved, has a due-diligence process been carried out about the potential partner?		
7 Are management and administrative time (and cost) accounted for appropriately in the business plan?		
8 Have you visited the (planned) location and checked its connectivity and urban amenities?		
9 Have you set up a system to monitor and respond to changing regulations that affect your operations abroad (incl. higher education regulation, foreign direct investment and migration regulations)?		
10 Have you set out a plan for closing the campus and defined occurrences that would lead to a closing of the campus (e.g. infringement of academic freedom, loss-making)?		

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Annex: Methodology

Following desk-top research and mapping of offshore campuses worldwide (see Kleibert et al., 2020a), we conducted 136 interviews with senior higher education managers and transnational education stakeholders in Europe, Asia and the Middle East between 2018 and 2020. The interviews were on average about one hour each. We voice-recorded and transcribed the interviews or, if permission to do so was not granted, took notes by hand and made memory protocols. Key themes addressed in the interviews were rationales and motivations for setting up offshore campuses, location choices, the changes in relation to (business) models over time and the manifold challenges experienced in operating offshore campuses. Most interviews were conducted face-to-face, supplemented by online interviews following travel restrictions during the Covid-19 pandemic. Our sample covers campus managers in Singapore, Malaysia, the United Arab Emirates, Qatar and Oman, as well as internationalisation strategists and decision-makers at the sending higher education institutions in the United Kingdom, France, Germany and the Netherlands.