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The international branch campus as transnational strategy in higher education

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The international branch campus is a phenomenon on the rise, but we still have limited knowledge of the strategic choices underlying the start of these ventures. The objective of this paper is to shed light on the motivations and decisions of universities to engage (or not) with the establishment of international branch campuses. As a point of departure, institutional theory has been selected to frame the potential motives for starting an international branch campus. Secondary literature, including professional journals and university reports and websites, has been analysed to obtain information that alludes to the motivations of universities for adopting particular strategies. It was found that university managements' considerations can be explained by the concepts of legitimacy, status, institutional distance, risk-taking, risk-avoidance and the desire to secure new sources of revenue. We argue that universities should avoid decisions that are based largely on a single dimension, such as legitimacy, but rather consider a broad spectrum of motivations and considerations.

Keywords Transnational strategy, international branch campuses, institutional theory, institutional distance, risk assessment

Introduction

In transnational education, learners are located in a country different to the one where the awarding institution is based. Transnational education can take several forms, including distance education, franchised programmes, collaborative ventures and international branch campuses. Since the turn of the century, the establishment of international branch campuses has accounted for most of the growth in transnational higher education. An international branch campus may be defined as an educational facility owned, at least in part, by a foreign institution, which operates under the name of the foreign institution, where students receive face-to-face instruction to achieve a qualification bearing the name of the foreign institution. Institutions that do not fulfil the criteria of this definition are ignored in this research, for example, branch campuses that are not at least partly owned by a foreign institution or those which do not award qualifications of the foreign institution, such as Yale University's campus in Singapore.

In 2011, there were at least 183 international branch campuses worldwide (C-BERT 2011). The largest host countries are the United Arab Emirates (UAE), China, Singapore and Qatar, and the largest source countries are the United States (US), Australia and the United Kingdom (UK) (Becker 2009). Although the international branch campus is a phenomenon on the rise, several US and UK universities have publicly declared that they are not interested in developing overseas campuses in the foreseeable future (Thompson 2006; Shepherd 2007; Olds 2008; Olson 2011). Despite some attention in the scholarly literature, but particularly in the popular media (see also Wildavsky 2010), our understanding of the motivations for setting up branch campuses is limited. Generally, branch campuses are seen as revenue-generating activities of

entrepreneurial higher education institutions (HEIs), but we will argue that a much more varied set of motivations lie behind setting up such initiatives. We are interested in identifying the reasons why some HEIs have decided to develop branch campuses while others have chosen not to establish them.

The establishment of international branch campuses is particularly interesting, because such initiatives go far beyond typical decisions and change processes in higher education. HEIs are known to evolve slowly and the usual change strategy seems to be piecemeal engineering (Kerr 2001; Meyer et al. 2007). On the contrary, overseas expansion is a high-risk growth strategy and unsuccessful ventures can result in huge financial losses and reputational consequences. For example, the withdrawal of the University of New South Wales from Singapore after just two months in 2007 resulted in a loss of US$38 million to the university (Becker 2009). Additionally, setting up a branch campus is not simply a product strategy. The higher education 'industry' is interesting as its services are difficult to replicate in different countries, in terms of curriculum, staff delivering the curriculum, physical surroundings, resources and equipment, and social and recreational offerings. Furthermore, HEIs have ambiguous goals and are noteworthy for divergent professional interests (Baldridge 1971). In other words, it is essential for HEIs to achieve both internal and external legitimacy (Scott 2008) in developing such initiatives.

As a point of departure, we adopt institutional theory as the lens through which to examine the decisions and strategies of HEIs. To investigate the impact of macro social forces on organisational decision-making, we first use Scott's three pillars of institutions as the theoretical framework for analysis (Scott 1995, 2008). Next, we consider the extent to which organisational agency impacts upon the decisions and strategies of HEIs (Tello et al. 2010; Wallman 2010). We explore the impacts of perceived opportunities and threats, and organisational/individual attitudes to risk. Finally, we draw conclusions about how best to understand decision-making and strategy in the field of higher education, and the motivations of universities for deciding to engage (or not) with the establishment of international branch campuses.

The aim of this study is to provide a theoretical explanation for the decisions made by HEIs regarding the establishment (or not) of international branch campuses. By providing a theoretical framework to analyse the decision-making of HEIs, our understanding of the rationales for chosen strategies is improved, and, with hindsight, by analysing the outcomes of those strategies we can better understand the reasons for successes and failures. Our arguments are supported by empirical evidence that comes from searches of secondary sources, which include books, academic journals, trade journals, newspapers, and the publications and websites of universities and research organisations. Data were also obtained from other online sources, such as government organisations in countries that host international branch campuses. Wherever possible, the triangulation of data between multiple sources, such as comparing HEI reports with those of regulatory organisations in host countries, ensured the accuracy of the data collected. When discrepancies were found, efforts were made to discover the reason. Literature searches were limited to the last fifteen years, as there was minimal branch campus activity before this date.

Institutional theory

Institutional theory has been widely adopted to aid the study of organisations and organisational change. Institutional theory attempts to explain the adoption of structures, practices and beliefs that conform to normative expectations for legitimacy. North (1991, p. 97) defines institutions as the humanly devised constraints that structure political, economic and social interaction, which consist of informal constraints, such as customs and traditions, and formal rules, such as regulations and laws. DiMaggio and

Powell (1983) argue that organisations within a particular organisational field tend to become increasingly isomorphic over time, adopting similar structures, processes and rhetoric, as they search for legitimacy. Institutional theorists believe that the approaches taken by neoclassical economists and rational choice political scientists provide an undersocialised conception of organisational behaviour, which ignore the influence of social forces on organisational action and decision-making (Granovetter 1985).

Scott (1995, 2008) suggested the three pillars of institutions as a possible framework for analysis when examining organisations or organisational change. According to Scott (1995, 2008), the regulative, normative and cultural-cognitive pillars are the three analytical elements that make up or support institutions. Each element operates through its own mechanisms and processes. Distinguishing between the different analytical pillars should help identify the processes taking place and the different pressures that institutions can exert (Luijten-Lub 2007). Scott (2008) recognises that each of the three institutional pillars offers a different rationale for claiming legitimacy, based on being legally sanctioned, morally authorized or culturally supported.

The regulative pillar

Institutions constrain and regulate behaviour. Regulative processes, which Scott (2008) called the 'regulative pillar', involve the capacity to establish rules, monitor others' conformity to them, and when necessary, to deliver sanctions - either rewards or punishments - in an attempt to influence future behaviour. These processes may operate through formal rules, regulations or laws, or through informal mechanisms, such as activities that lead to shaming or shunning.

In most countries, especially in Europe, higher education is part of the public sector and so higher education comes more directly under the control of governments. Whilst the level of autonomy given to universities with regard to curriculum and academic matters varies across countries, but usually affords institutions a fairly high degree of decision-making power, governments tend to make the major decisions about funding and levels of tuition fees. Increasingly, governments have begun to dictate how HEIs should view entrepreneurship and internationalisation as core organisational objectives, typically encouraging these things in order to reduce the reliance of HEIs on state funding (Slaughter and Cantwell 2011). The corporatisation of institutions is a process also occurring outside Western countries, in East Asia for example (Marginson 2011; Welch 2011).

One clear regulatory imperative for setting up branch campuses is related to public funding. As state funding for higher education in countries such as the US, UK and Australia has increasingly failed to satisfy the needs of HEIs to achieve expansion and investment targets, it has become necessary for institutions to develop alternative sources of revenue (Welch 2011). One of the strategic aims of Monash University (Australia) set out in its development plan of 1999 was to become increasingly self-reliant and less dependent on government funding (McBurnie and Pollock 2000). Furthermore, the plan stated that income generation and entrepreneurial activity was an important aspect of the work of the university. To achieve its aims, Monash has established international branch campuses in Malaysia and South Africa.

A second imperative is related to the regulatory forces in the host country. Western universities considering establishing an international branch campus must carefully consider the regulative frame in each potential host country. During the last decade, several countries in the Middle and Far East have established higher education hubs, whereby a number of HEIs locate on the same site or in the same city (Knight 2011). Countries such as Malaysia and Singapore have encouraged, even invited, foreign universities to establish branch campuses, as a solution to capacity shortages in higher education, skills shortages in the labour force, and to develop knowledge-based

economies (Welch 2011). The governments of these countries have also argued that increased competition among higher education providers will improve quality.

Most of the international higher education hubs offer particularly favourable conditions for foreign branch campuses (Becker 2009). At Dubai International Academic City (DIAC), for example, foreign HEIs enjoy 100% foreign ownership, no taxes, 100% repatriation of profits and exemption from the licensing requirements of the federal Commission for Academic Accreditation (CAA). In Abu Dhabi, the local government completely funded the development of campuses by New York University (NYU) and Paris-Sorbonne, and it will also meet their on-going operational expenses.

A third stimulus, or better regulatory inhibitor, stems from host country policies that put a brake on foreign establishments. In some locations, such as the Incheon Free Economic Zone in South Korea, the regulatory frame prohibits foreign HEIs from making profit. India is a country that is keen to not allow foreign universities to establish branch campuses with the objective of making profit. However, India is a country that has attracted the interest of many foreign universities, as the increase in demand for higher education has averaged more than 4 per cent per annum over the past four decades and the country's middle class has been forecast to expand from 5 per cent of the population in 2007 to 40 per cent by 2030 (Rizvi and Gorur 2011).

Given that there exists no regulatory framework for the establishment of international branch campuses, it is not surprising that a recent study by India's National Institute of Educational Planning and Administration did not find in India any campuses operated by foreign HEIs (Agarwal 2009). Although the regulatory structure in India is complex and multi-layered at national and state levels, under the rules of the Foreign Investment Promotion Board, foreign universities do not in fact require any approvals before establishing operations in the country. However, the degrees awarded solely by foreign providers are not legally recognised. This fact could prevent foreign providers from gaining legitimacy and recruiting students. For this reason, foreign HEIs wanting a presence in India virtually always work with local partners, which deliver mainly collaborative programmes (joint/double degrees) or twinned programmes, the latter involving study both in India and the country where the foreign HEI is based (Jayaram 2004). There are now over 131 foreign HEIs operating in India, providing education for up to 15,000 students (Agarwal 2009). The regulatory frame in India has also prevented Indian institutions from establishing offshore operations. For example, the charter for the Institutes of Management did not permit the India Institute of Management in Bangalore to accept Singapore's invitation to establish an operation there and India's Human Resource Development Ministry did not offer any support for the venture (Rumbley and Altbach 2007). However, this has not deterred entrepreneurial private universities from establishing international branch campuses. In 2011, Amity University had six campuses worldwide, in locations that include Dubai, London, New York and Singapore.

China has had legislation in place that regulates foreign HEIs since 2003 (The Regulations of the People's Republic of China on Chinese-Foreign Cooperation in Running Schools). Article 3 of the Regulations states that the national government encourages Chinese HEIs to cooperate and form partnerships with high quality foreign institutions to provide high quality education in China. However, the establishment of branch campuses by foreign universities is not permitted unless undertaken with a local institution (Huang 2007). Two British Universities (Liverpool and Nottingham) have branch campuses in China, but the regulatory frame encourages local stakeholders to consider these campuses not as branches of UK universities but as independent universities (Huang 2007). It is estimated that over 1,000 foreign HEIs have some kind of collaborative arrangement in China, including American institutions such as John Hopkins University and the University of Michigan, and around 11,000 students are

studying in China for a British degree (Altbach 2009). Foreign HEIs may embark upon collaborative arrangements in China now, to gain information and support from local partners and to build up experience of operating in the country, with the view to possibly establishing branch campuses some time in the future, especially if ownership requirements are eventually relaxed.

In sum, the regulative pillar helps explain the interest of HEIs in countries such as Australia and the UK, which together account for 17% of the international branch campuses globally (Becker 2009). Financial pressure has challenged them to explore international adventures, including setting up branch campuses. The relatively favourable circumstances for setting up such campuses in educational hubs explain why certain parts of the world (Dubai, Qatar, Singapore, Malaysia) are more attractive than others. At the same time, more adverse host country policies explain the lack of initiatives in other countries (and/or the specific nature of partnerships).

The normative pillar

In addition to regulative processes, institutions also consist of normative structures and activities. The normative pillar is based upon norms and values that exist in society. Values are conceptions of the preferred or the desirable together with the construction of standards to which existing structures or behaviour can be compared and assessed (Scott 2008). Norms specify how things should be done and what actions are appropriate; they also help define goals or objectives. Decision-makers at HEIs contemplating establishing international branch campuses need to consider the normative structures and activities that exist in both home and host countries.

Although the conception of 'rules' in the normative frame is quite broad, including routines, procedures, conventions, roles, strategies, codes, cultures, beliefs and organisational forms, March and Olson (1989, p. 22) suggest that the focus remains on social obligations. Searing (1991, p. 1253) explains that in observing 'rules', actors do not become slaves to social conventions; rather they are reasonable people adapting to the rules of institutions. Actors will select and interpret rules, and adapt them to the demands of a particular situation.

HEI managers need to understand the cultures and business practices in the regions where they would like to operate. In countries such as China, Korea and Singapore, the Confucian model moulds higher education systems. Although foreign HEIs might benefit from high levels of family commitment to investment in higher education, they need to be aware that governments retain tight control over policy, planning and funding (Marginson 2011). In some countries, complex regulations and high levels of bureaucracy can make it difficult for foreign organisations to establish operations and to conduct business. The use of social networking methods, such as 'guanxi' in China and 'wasta' in the Arab World, can be essential to foreign HEIs in order to 'get things done'. In many countries worldwide, finding a local partner or intermediaries with good connections and a strong knowledge of local business practice is often the first essential step for foreign HEIs intending to establish operations. The University of Reading explained that its decision to open a campus in Malaysia was driven by the university's existing links in the country, particularly its association with a local institution (Cunnane 2011).

Hutchings and Weir (2006) argue that the business systems of China and the Arab World are an amalgamation of institutions and culture. In China, business practice has been shaped by over five decades of communism and in the Arab World business practices are often moulded by the influences of Islam and the rulers of individual states. Hutchings and Weir (2006) observe that it is often difficult to recognise the boundaries of institutional and cultural differences as they overlap and reinforce each other.

At many universities, particularly in Europe, it has become the expected norm that academic staff become involved in internationalisation issues and activities, which may include internationalising the curriculum, recruiting more international students, organising international student exchanges, engaging in international research cooperation and publishing in the English language. So, one stimulus for setting up international branch campuses is rooted in the norm to internationalise.

This does not immediately explain different responses in different countries. The degree of institutional autonomy in relation to the state will have a significant impact on the institution's attitude towards internationalisation issues. Whilst funding structures and legislation are part of the regulative frame, governments can still shape norms and expectations. For example, when Tony Blair was prime minister in the UK, he made it clear that he thought UK HEIs should play a larger part in the global market for international students. The British government encouraged the concept of entrepreneurship in HEIs, which has resulted in them become increasingly autonomous and business-like institutions. Governments also offer recognition and awards for transnational entrepreneurship. For example, Middlesex University, with overseas campuses in Dubai and Mauritius, has received the Queen's Award for Enterprise twice, in recognition of its contribution to international trade. HEIs in the UK are able to set their own strategic objectives with regard to the number of international students they recruit and the tuition fees they charge to non-EU students. More generally, countries that have implemented reforms inspired by (neo-liberal) philosophies and New Public Management (US, UK, Australia) are generally more conducive to transnational activities.

The internationalisation of higher education and the growth in transnational provision can be seen as institutional responses to globalisation (Marginson and Van der Wende 2007; Maringe and Gibbs 2009). In their search for legitimacy, universities have tended to adopt isomorphic strategies, and as a result universities across different countries and continents increasingly have similar curricula, teaching methods, administrative practices, financial objectives and management systems (Meyer et. al. 2007; Donn and Al Manthri 2010).

Until late in the twentieth century, higher education was generally considered a public good, but since the 1980s many universities and governments in developed Western countries seem to have adopted the view that higher education is a tradable commodity to be sold for commercial gain (Altbach 2004, p. 11). Thus, the marketisation of higher education has become very much part of the normative frame, supported by neoliberal ideology that favours free trade, which has been driven by initiatives of the World Trade Organisation (WTO), such as the General Agreement on Trade in Services (GATS) (Marginson and Van der Wende 2007).

As transnational higher education often flows from more developed to less developed nations (Naidoo 2009), the establishment of international branch campuses can be regarded as a new form of colonialism (Welch 2011). Even though universities generally aim to maximise both revenues and prestige (Slaughter and Leslie 1997), criticisms of transnational education might lead some institutions to emphasise their contributions to social and economic development and play down their economic motives and those relating to achieving global recognition and influence. Institutions can even change their declared objectives. For example, after suffering financial losses over many years, Monash University reconfigured the rationale for its campus in South Africa from market enterprise to de facto aid project (McBurnie and Ziguras 2007, p. 42).

In countries such as Finland and Norway, the status of higher education as a public good is emphasised, and undergraduate education for both national and foreign students is free. The situation is similar in Germany, even though many universities have been

allowed to charge tuition fees since 2005. Not all German States introduced tuition fees, and some that did have now reversed their decision. Leaders of German HEIs have claimed that their past inability to charge tuition fees inhibited their ability to engage in certain international activities (Van der Wende et al. 2005, p. 228). However, many people worldwide still believe that the increased commercialisation of higher education conflicts with higher education as a public good. In countries, where this is the dominant view, the normative frame might discourage HEIs from pursuing overseas expansion.

It is clear that the normative pillar is able to (partly) support explanations that focus on why certain countries are more visible in the transnational higher education market than others.

The cultural-cognitive pillar

Boyd and Richerson (1985, p. 2) define culture as, 'the transmission from one generation to the next, via teaching and imitation, of knowledge, values, and other factors that influence behaviour'. The cultural-cognitive pillar concerns the shared conceptions that constitute the nature of social reality and the frames through which meaning is made (Scott 2008, p. 57). Whereas the normative pillar is associated with norms and values, the cultural-cognitive pillar is concerned more with cultures (Peng et al. 2009, p. 64). Individuals construct their versions of social reality within the wider pre-existing cultural systems. Symbols, such as words, signs and gestures, shape the meanings an individual attributes to objects and activities. Organisational researchers are increasingly favouring the cultural-cognitive pillar over the others, and scholars such as DiMaggio, Powell and Scott stress its central position among institutions (Scott 2008, p. 57).

Actors follow routines because they are taken for granted as 'the way things should get done' (Scott 1995, p. 44). Whereas normative theorists emphasise the power of roles, the cultural-cognitive framework stresses the importance of social identities, an individual's conception of who they are and the actions that make sense for them in any given situation. Individuals and organisations deal with uncertainty by imitating others, thus resulting in isomorphic structures and processes. This provides a good explanation for the spread of international branch campuses where English is the language of instruction, and obviously certain countries have a historical advantage to develop market initiatives abroad. Coupled with this notion is the taken-for-grantedness of a certain level of quality (of education) offered by providers from certain countries, particularly those hosting a fair number of elite global players. Of course, this is not a guarantee for quality education being offered in host countries, but it will certainly have added to the legitimacy of many US and UK institutions (even if they were not Harvard, Yale, Oxford or Cambridge) entering a foreign country.

Institutional distance

The taken-for-grantedness, based on cultural-cognitive understandings in the Western world may clash with that of the host country. In other words, cultural distance plays a considerable role in transnational activities. Kostova (1999) and Kostova and Zaheer (1999) argue that not only is cultural distance important in determining and explaining the behaviour of multinationals, but so too is institutional distance. Institutional distance is defined as the difference between the regulatory, normative and cultural-cognitive institutional environments in an organisation's home country and a foreign host country (Kostova and Zaheer 1999, p. 68). The institutional distance construct, therefore, builds on Scott's (1995) 'three pillars' conceptualisation of institutions.

For HEIs, the rules and norms in a host country can be very different to those in a home country, and managers might often not feel confident that their organisations

could adjust successfully in a different environment. In developing countries, institutions are often less well developed, and they can often be evolving at a rapid pace, which can result in a high degree of institutional ambiguity, and therefore a higher level of uncertainty for organisations. Higher levels of uncertainty represent higher levels of risk for HEIs considering establishing an international branch campus.

Phillips et al. (2009) extended the concept of institutional distance to include institutional uncertainty. This approach allows an organisation to categorise the different forms of institutional environment that it could face. Phillips et al. (2009) argue that considering institutional uncertainty as well as institutional distance results in a more accurate measure of the institutional differences between two countries.

Adopting the conception of institutional distance suggested by Phillips et al. (2009), there are four distinct types of institutional environment that an organisation might encounter in a host country. Figure 1 illustrates how a university might assess its internationalisation options for overseas expansion. If the institutional distance between a home and host country is low, i.e., institutional differences between the two countries is low and institutional uncertainty in the host country is low, then a university can simply replicate what it does at home in the foreign country; it can adopt the same structures and processes and deliver the same programmes. This is the situation facing American HEIs that have branch campuses in Western Europe.

		Institutional uncertainty in host country	
		Low	**High**
Institutional difference in host country	**High**	**Adapt** Moderate risk, complexity, effort Establish international branch campus but adapt structures and processes to suit institutional context in host country	**Avoid** High risk, complexity, effort Do not establish international branch campus in this host country – the risks are too high
	Low	**Transfer** Low risk, complexity, effort Establish international branch campus using the same structures and processes used at the home campus	**Hedge** Moderate risk, complexity, effort Establish international branch campus but as a joint venture with a local partner or obtain funding and assurances from host country government

Adapted from Phillips et al. (2009, p. 341)

Figure 1 Transnational strategies for a university based on institutional difference and institutional uncertainty.

If institutional differences are high but uncertainty in the host country low, then the university can still establish an international branch campus in that host country, but it will have to adapt its structures and processes to suit the local context. This will normally not be difficult, as the institutional environment is stable and predictable and so the organisation is able to plan with minimal risk (but see, e.g., Wildavsky (2010) on George Mason University's experience in Ras al Khaimah). Foreign HEIs in the Arab Gulf States typically modify their staffing and curricula to take account of local religion, culture and values, and to make vocational programmes suitable for local contexts. However, there exists pressure on HEIs to simultaneously implement standardisation and local adaptation strategies (Shams and Huisman 2011).

For some countries, the institutional difference between home and host country might seem low but uncertainty in the host country is high because the institutions in the host country are less developed or evolving rapidly. This situation is common in developing countries. A university can minimise the risks of setting up abroad by seeking a local partner that has a better understanding of the local environment. In doing so, the university can convey an image of legitimacy, and when the strategy is seen to be successful, it is likely to be imitated by other universities (Lowensberg 2010, p. 1095).

All of the branch campuses established in Malaysia between 1996 and 2007 involved partnerships between foreign HEIs and local companies (McBurnie and Ziguras 2007, p. 40), where the companies provided market intelligence, capital and physical infrastructure while the HEIs were responsible for the intellectual and educational components. When evaluating possible overseas investments, most universities employ consultants and 'experts' based in host countries. However, a study by Shanahan and McParlane (2005) at the University of New England (Australia) found that local partners had the tendency to underestimate risks, and research conducted by Cassidy and Buede (2009) found that the accuracy of expert judgement is often no better than chance.

Universities can minimise the risks they face by entering into agreements with host country governments, which might involve provision of funding or assurances about academic freedom and operational autonomy (see e.g. Sidhu et al. 2011). The six US universities that have established branch campuses at Education City in Qatar are fully funded by the Qatar Foundation, a non-profit organisation that is dedicated to building human capital in the country, but they still retain full autonomy in operational decision-making (Witte 2010). Since May 2011, the branch campuses located at Education City have collectively become known as Hamad Bin Khalifa University.

If institutional differences between home and host countries are high and institutional uncertainty in the host country is also high, then the institutional distance is high. A university would experience high levels of risk and uncertainty operating in a host country with high institutional distance and the effort required might not be worth the potential reward. Universities would usually avoid such countries. India, for example, is a country with a huge undersupply of higher education, yet the complex regulatory frame makes the country very unattractive to foreign universities seeking to establish international branch campuses.

Table 1 provides a summary of the number of branch campuses established in different countries/regions, the levels of institutional difference and uncertainty associated with those countries/regions, and the likely strategies adopted by foreign HEIs. The data shown is intended only to present our general model as within regions there will be countries that are different, within countries there may be areas that are different, e.g. free zones, and within countries/regions individual HEIs might adopt different strategies. It can be seen however that international branch campuses are concentrated in locations where HEIs can implement the less risky transfer or adapt

strategies. We conclude that the concept of institutional distance adds significantly to explaining branch campus strategies, for it helps to understand why certain host countries are avoided or why particular partnership constructions are developed that mitigate and reduce risks.

Table 1 Number of branch campuses in different countries/regions in March 2011 and likely strategies adopted.

Country/region	Institutional difference[a]	Institutional uncertainty	Strategy	Number of international branch campuses[b]
Africa	High	High	Avoid	6
Australia	Low	Low	Transfer	4
China	High	Low[c]	Adapt	13
Hong Kong	Low	Low	Transfer	5
India	High	High	Avoid	0
Malaysia	Low	High[d]	Hedge	6
Singapore	Low	Low	Transfer	15
Rest of Asia	High	High	Avoid	11
Arab Gulf States[e]	High	Low	Adapt	50
Rest of Middle East	High	High	Avoid	3
Europe	Low	Low	Transfer	34
North America	Low	Low	Transfer	10
South America	Low	High	Hedge	4

[a] Based on North American/European higher education model.
[b] Based on data compiled by C-BERT (2011).
[c] Due to existence of clear regulatory framework.
[d] Uncertainty has fallen considerably in recent years implying a shift to the transfer strategy.
[e] Excluding Saudi Arabia.

Weaknesses of institutional theory

DiMaggio and Powell (1983) identified three mechanisms that exert pressure on actors toward isomorphism: coercive, mimetic and normative influences. Coercive isomorphism stems from formal (e.g. laws) and informal pressures (e.g. social norms and values) for compliance in order to achieve legitimacy. Government pressure on HEIs to be more entrepreneurial and to seek new sources of revenue, to reduce their dependency on public finances, has encouraged institutions in some countries, notably Australia and the UK, to engage in more transnational activities. Mimetic isomorphism occurs as a response to uncertainty whereby organisations imitate other organisations that they believe to represent a higher level of success and achievement. If the world elite universities publicly declare that they will not establish branch campuses, this encourages other universities that aspire to be considered similar to the most elite institutions to also decide against establishing branch campuses.

Finally, normative isomorphism is rooted in the process of professionalization – the values, codes and standards prevailing in higher education systems worldwide, which are reinforced by accreditation bodies, quality assurance agencies and the media (e.g. through rankings). Conferences on international trade and the internationalisation of higher education might encourage HEI decision-makers to engage in more transnational

operations, including the establishment of branch campuses. In deciding whether or not to engage with the establishment of international branch campuses we can see that decision-makers may be influenced simultaneously by different isomorphic mechanisms that pull them in opposite directions. Although institutions shape the identities, perceptions, orientations and decisions of actors, actors can see and interpret the same institution in different ways, thus resulting in actors engaging in different behaviours (Jackson 2010).

The structure versus agency debate is perhaps the most central quarrel dividing institutionalists (Heugens and Lander 2009). At stake is the question of whether organisational behaviour is primarily the product of macro social forces or of organisational agency. The meta-analysis conducted by Heugens and Lander (2009) found that the three forms of isomorphic pressure identified by DiMaggio and Powell (1983) - coercive, mimetic and normative – did indeed cause organisations to become more homogenous.

Despite Heugens and Lander's (2009) finding, it is clear that universities which face common institutional pressures can still end up making different decisions and engaging in different behaviours. Hoffman (2001) argues that organisations differ in their receptivity to institutional pressures and Oliver (1991) claims that organisations enjoy at least some discretion in their responses to institutional processes, a claim which is not incompatible with the findings of Heugens and Lander (2009). This is further illustrated by Witte et al.'s study (2008), which found that in response to the Bologna process - an example of a common coercive pressure - actors in three European countries were still able to introduce diverse sets of changes in each of their countries. Several scholars have argued that examining only institutional forces is not sufficient to explain divergent organisational behaviours (Delmas and Toffel 2008).

Researchers have adopted various approaches to explaining the non-isomorphic behaviour of organisations, including consideration of external triggers for organisational change, organisational responses to these environmental triggers and the organisational features that support change (George et al. 2006). Most of the researchers that have used institutional theory to examine the roles of human agency and the cultural-cognitive features of the institutional environment have focused on the organisation rather than on the organisation's principal decision maker(s). Decision-makers process information in different ways and can therefore interpret environmental pressures in different ways. In formulating organisational strategy, HEI leaders may perceive their institution's strengths and weaknesses differently and they might place a different weighting on potential opportunities and threats. In the following section, we consider how actors' perceptions and attitudes toward opportunities, threats and risks might influence organisational decision-making.

Opportunities, threats and attitudes to risk

Opportunities and threats are two things that have been found to be influential in the decision-making of senior managers (Dutton and Jackson 1987). An individual's attitude to risk and their subsequent actions might be influenced not only by the expected returns of particular courses of action resulting from different decisions but also where each potential decision stands relative to some predetermined reference point in the decision maker's mind (Kahneman and Tversky 1979; Shoham and Fiegenbaum 2002).

George et al. (2006, p. 352) argue that the gain or loss of resources or control is related to an organisation's gain or loss of legitimacy. However, an organisation is also more likely to face a loss of legitimacy when it departs from the widely accepted or usual ways of doing things (Goodstein 1994, p. 359). Individuals are more likely to be risk taking when facing a loss situation, such as reduced revenues. In considering

strategic options, decision-makers might then underweight the risk of further loss and overweight potential gains. This proposition would explain why leaders at universities such as Monash and Middlesex have been willing to undertake riskier revenue-generating activities, including establishing international branch campuses, when faced with falling state funding that threatens future investment, growth and job security. It has been estimated that Middlesex University faces losses of £5 million in 2011-12 (McGettigan 2011). HEIs face a multitude of risks when venturing overseas, many of which are almost impossible to plan for. For example, just months before Middlesex's campus was due to open in India, its local partner unexpectedly cancelled the project (McGettigan 2011). As the local partner constructed and owned the premises, Middlesex was forced to abandon its immediate plans for a campus in India even though it had already incurred costs for curriculum development and marketing.

When considering actions that might achieve additional gains, rather than reduce losses, individuals can be risk-averse since they often underweight potential additional gains and overweight the risk of potential loss. This explains the strategic choices of universities such as Cambridge, Pennsylvania, St Andrews, Warwick and Yale, which have decided not to open overseas branch campuses, to avoid loss of their elite status and to maintain legitimacy. Tufts University has considered several opportunities but each time concluded that the potential gains did not outweigh the risks (Olson 2011). Of particular concern to the university was its ability to ensure the quality of an overseas branch operation. Bocconi, a leading business school in Italy, takes a different attitude to risk; it believes that the competitive advantages gained by establishing an early presence in India - by opening a branch in Mumbai - outweighs the risks (Ramsay 2011). However, before establishing a campus in India, Bocconi had already been operating in the country for eleven years with partner institutions. The substantial knowledge and experience gained by Bocconi during this period may have helped the institution to reduce the risks involved in opening a branch campus.

The type of institutional governance that requires thorough debate and which involves all key stakeholders before key decisions are made, adopted by universities such as Pennsylvania and Yale, also results in HEIs sticking with traditional structures and processes and rejecting the idea of establishing campuses overseas (Olds 2008). When facing threats, individuals and organisations tend to pursue routine activities (George et al. 2006, p. 350). Middle-ranking universities may decide that it is better to strengthen their legitimacy by improving their home operations before venturing overseas. In contrast, New York University's (NYU) decision to establish a branch campus in Abu Dhabi might have been motivated by its desire to gain control and influence as a major player in the international higher education market.

An understanding of human agency and individual/organisational attitudes to risk can explain why certain HEIs have been willing to take risks by setting up branch campuses and – most importantly – they help explain why obvious candidates for developing branch campuses (i.e. legitimate and high-quality HEIs such as Cambridge, Pennsylvania and Yale) have not pursued such initiatives. However, institutional theory would argue that leaders' decisions are made ideologically and normatively rather than rationally, which therefore results in little scope for diversity. Institutional theory rejects rational actor models as it assumes that an individual's behaviour is guided by their awareness of their role in a social situation and their desire to behave appropriately, in accordance with others' expectations and internalised standards of conduct (Oplatka and Hemsley-Brown 2010). However, such an argument ignores the possibility that leaders might make decisions based on self-interest.

Discussion and conclusions

This study found that Scott's (1995) concept of the three pillars of institutions provides a valuable theoretical framework with which to examine the decision-making of HEIs with regard to transnational strategy and the establishment of branch campuses overseas. It also found institutional distance - in fact, a concept that builds on Scott's pillars - a valid construct with which to measure the differences between home and host countries. Consideration of human agency and individual/organisational attitudes to risk contributes further to explanations of (micro-level) decisions. It is clear that a mix of macro social forces and individual or organisational agency influence the strategic decision-making of HEIs.

The perspectives used explain how regulations affect the emergence of branch campuses and why certain HEIs from particular countries (US, UK and Australia) have been more prominent in these entrepreneurial activities. They also explain why certain regions are very attractive for branch campuses (educational hubs, supported by host country governments) and why branch campuses are not that evident in countries such as India. In addition, HEIs are clearly influenced by the norms and values that exist in society (the normative pillar).

In many countries there exists a widespread belief that HEIs should not expand abroad because doing so would divert time, money and effort from home operations to the detriment of home students. This was a view expressed by the editor of a student newspaper at the University of Warwick when the university was considering establishing a campus in Singapore (Hodges 2005). Decision-makers cannot ignore such opinions amongst key stakeholders as the result might be the loss of legitimacy, which could then lead to less funding, negative comments in the media, less applications from students and lower placings in league tables. Within HEIs, actors follow routines because they are taken for granted as 'the way things should get done' (Scott 1995, p. 44). HEIs construct their versions of social reality within the wider pre-existing cultural systems (the cultural-cognitive pillar) and the interpretations of HEIs and their leaders vary across country and region (Huisman and Van der Wende 2005).

The study found that institutional theory and institutional distance provided a useful point of departure to analyse the decisions of HEIs. However, although empirical evidence seems to support the high/high and low/low institutional difference/uncertainty hypotheses, there is less support for the claim that alliances and partnerships are the result of contexts that are characterised by low institutional difference and high institutional uncertainty. In China, for example, it is the regulative frame, i.e., legislation and regulations, which has forced universities such as Liverpool and Nottingham to form partnerships in order to develop branch campuses.

In all, the analysis adds to our understanding of strategies and decision-making surrounding the international branch campus. Obviously, our analysis has shortcomings. Institutional theory is particularly strong in explaining lack of change, which sits uneasily with the fact that a large number of HEIs have established branch campuses, and many others consider doing so. One way out of this paradox is to assume that setting up a branch campus a decade ago was something out of the extraordinary and that over time (admittedly a short period) the 'liability of newness' threatening the legitimacy of branch campuses has been won over. It fits in with the pattern we found: given that the thirteen UK-based international branch campuses that are already established seem to be largely successful, then, if we assume that structures may be transforming, this would give decision-makers in the elite UK universities the capacity to adopt strategies that would previously have been regarded as 'illegitimate'.

There is evidence that this process has already begun; Imperial College announced in September 2010 that it will develop a medical school in Singapore with Nanyang Technological University (Vasagar 2010) and then, in October 2010, University College

London announced that it will establish a campus in Qatar, to conduct research and deliver programmes in archaeology, conservation and museum studies (Gill 2010). In 2011, Lancaster University announced plans for a campus in China and the University of Reading a campus in Malaysia.

Western HEIs have many different motives for establishing international branch campuses but the most important seem to involve money, influence and status. Now that over 183 international branch campuses exist globally (C-BERT 2011), and given that these include prestigious institutions such as NYU and Paris-Sorbonne, HEI leaders may no longer feel that establishing an international branch campus is a non-isomorphic action that is a threat to their legitimacy. For this reason, we might see more international branch campuses being established in the future, although the current global economic downturn will probably prevent many HEIs from establishing a campus overseas in the immediate future. It is not only Western HEIs that are showing increased interest in establishing international branch campuses. Several Indian institutions already have a physical presence overseas and, in May 2011, Soochow was announced as the first Chinese university to establish an international branch campus (in Laos).

A second caveat of our research is the stress on macro-level forces and the lack of attention to very specific contextual factors that may have played significant roles as well. One of these contextual factors pertains to the potential role of a powerful individual agent. Structures act not only as constraints on human agency; they are also enabling, which allows managers to work in creative and formative ways. A powerful vice-chancellor can, in certain contexts and in certain countries, depart from the usual ways of doing things and if their innovative actions lead to success then they can help reconceptualise what is normal and acceptable. Krieger (2008) believes that the realisation of the NYU campus in Abu Dhabi is the result of the personal ambition and vision of one man - John Sexton, NYU's president - and suggests that without Sexton's determination, the NYU Abu Dhabi campus is unlikely to have been established.

Sexton claims that having the Abu Dhabi campus will help transform NYU into a truly global university, into one of the global elite (Krieger 2008). This is his prime motivation for developing the campus in Abu Dhabi, and the reason why his tolerance for risk is so high. Indeed, Sexton had to overcome considerable opposition to the expansion plan from within his institution. Opponents claimed that academic freedom and human rights were not guaranteed in the UAE and that such a large overseas campus would be a distraction to pursuing quality and improvement at the home campus. Shanahan and McParlane (2005) found that all of the offshore teaching programmes examined in their study at the University of New England (Australia) were the result of academic networking and the personal contacts of individual academic staff, which again highlights the importance of individual human agency.

It is clear that some universities might achieve competitive advantage by focusing on the quality and reputation of their home operations while other universities might achieve competitive advantage by opening international branch campuses. This study found that university managements' considerations can be explained by the concepts of legitimacy, status, institutional distance, risk-taking and risk-avoidance. The contribution therefore adds to our understanding of strategic decision-making on this salient topic.

Some universities claim that their primary motive for establishing a campus abroad is to aid the social and economic development of a developing country. Given that most universities are unable (legally) or unwilling to use the revenues they generate in their home countries to develop overseas branches, they need to secure funding from new sources to engage in operations abroad. For example, Carnegie Mellon will receive $95 million over 10 years from the Rwandan government to operate a campus in Rwanda

(Wilhelm 2011). Although Carnegie Mellon's campus in Rwanda may be regarded as an aid project, as part of a growing network of operations worldwide the campus also increases the university's prestige and global presence. Projects such as these can generate a lot of favourable publicity and improve the images of institutions, although in this case Carnegie Mellon is facing considerable criticism for supporting an autocratic regime with a mixed record on civil liberties, including the suppression of free speech. Concerns over civil liberties and academic freedom were contributory factors to the University of Warwick's decision to not establish a campus in Singapore (Hodges 2005). Africa is already host to at least six international branch campuses and although there is plenty of unsatisfied demand for higher education across the continent, Africa is not a particularly attractive location for foreign HEIs aiming to generate easy profit, as average levels of income are very low in many African countries.

The practical message of the contribution is based on the finding that all factors distinguished seem to play a role in the decisions regarding international branch campuses. A straightforward focus on largely one dimension of the range of factors seems therefore ill-advised. Profit seeking may be a sensible strategy, but only if the other dimensions of the decision (e.g. institutional distance) are taken on board as well. The nature of higher education requires institutions to consider cultural differences, in order to determine the extent to which curriculum, pedagogy and other institutional processes should be modified. In 2012, Bocconi University will open its first overseas branch, in India. The courses delivered in India will not be a 'carbon copy' of those in Italy, but rather they will be tailored to trends in Indian higher education and will focus on Asian markets and entrepreneurship (Ramsay 2011).

Regulatory and financial opportunities offered by the host country may be an important trigger to consider a branch campus, but unstable regulations and evolving dynamics in the host system and country may quickly turn opportunities into threats. Decision-makers should rather consider a broad spectrum of motivations with reference to a range of theories and concepts rooted in different disciplines and traditions. Our preliminary findings encourage further research to investigate particular case studies, to gain a deeper insight into the decision-making processes within universities, and to discover whether these cases fit with our general findings and contentions. Such studies might also shed light on other dimensions in strategic decision-making, such as emotions (Naqvi et al. 2006) and sense making (Ericson 2010).

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