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Transnational education provision in a time of disruption: Perspectives from Australia

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Abstract

As the scale and scope of transnational education (TNE) has broadened, and the range of delivery models and partnerships has continued to expand, so too have the challenges. Universities offering courses outside their own country face a growing range of legal, practical and political challenges. The significant disruption during 2020–2021 coming from the global coronavirus pandemic, and its effect on the provision of higher education in most countries, has further amplified many of these challenges, raising questions about what the future might hold for TNE, including in China. This article aims to establish the major enablers and challenges for TNE provision. It utilises an investigation into Australian TNE providers immediately prior to the COVID-19 pandemic as a means to analyse these factors. As a major provider of TNE, including in China and other Asian countries, Australia provides a useful example of how TNE partnerships are being facilitated, for better and worse. In particular, the article establishes that tailored and often market-specific collaborations offer the best chance of a successful partnership. The study also provides an important basis for considering how TNE will function as a key component of the ongoing response of the higher education sector to the pandemic.

Keywords

transnational higher education, partnerships, offshore education, international branch campuses, online education, Australia

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Introduction

Since the 1990s, there has been a steady growth in many countries of higher education provided by foreign universities or other educational organisations such as private companies. Viewed through the lens of the perceived benefits for students of access to high-quality education without leaving their own country, the growth in popularity of transnational education (TNE) appears uncontroversial. However, as the scale and scope of TNE has broadened, and the range of delivery models and partnerships has continued to expand, so to have the challenges for TNE providers. Universities offering courses outside their own country face a growing range of legal, practical and political challenges. The significant disruption during 2020 coming from the global coronavirus pandemic, and the dramatic effect this has had on the provision of higher education in most countries, has further amplified many of these challenges, raising questions about what the future might hold for TNE.

Using Australia as a case study and drawing on a large survey of Australian TNE providers undertaken in 2019, this article examines barriers and challenges to TNE provision, as well as those factors that were deemed to create opportunities for its expansion. This data provides a useful frame to examine how the pandemic may affect future provision which at the time of writing was still largely unknown, although as the evidence presented here demonstrates there are formidable challenges even before the COVID-19 disruption. The paper is structured as follows: first, it offers a typology and definitions of distinct forms of TNE provision, delineating between distinct modes of operation in the different countries to which Australian universities and educational providers offer higher education. Second, the paper details factors for Australian TNE providers identified as offering growth potential, as well as barriers to expansion, in key countries and territories. This analysis is informed by recent research, as well as the findings of a study commissioned by the Commonwealth Department of Education and Training in Australia (Croucher et al., 2020). This analysis shows that while Australian universities find it increasingly difficult to pursue a broad ‘one size fits all’ approach to TNE provision, legal and regulatory dealings with local authorities are a common challenge, and likely even so for online provision. These ‘sovereign’ issues appear more significant than those associated with technology, workforce or different organisational cultures and expectations. Equally, and despite the diversity of provision, there appears common agreement that open communications and robust processes between local partners and the Australian provider increase the likelihood of success. As the Australian data was collected just prior to the emergence of the coronavirus pandemic, it provides a useful snapshot of activity (and issues) just prior to the onset of major disruption. In this sense it provides a ‘baseline’ for assessing the impact of the pandemic on TNE. Third, the paper uses this analysis to offer comments on what the pandemic may mean for future TNE provision and to set out a future research agenda to ascertain its effects.

Defining transnational education

In analysing the Australian case study, it is important to recognise that key terminology used to describe TNE differs between countries. Indeed, there is significant conjecture surrounding TNE leading to suggestions that the ‘current typology has declining value because partnerships are becoming multidimensional and blurring the boundaries between one type and another’ (Healey, 2015: 1). This makes collection and analysis of comparative data regarding distinct approaches to provision difficult, prompting Knight and McNamara (2017:1) to argue that ‘the inconsistency in the use of terms also makes comparisons of TNE provision, data, policies and research within and across countries challenging and often inconclusive’. Examples of this are Australia, which does not include any form of online learning as part of its TNE data, and Germany, which does not

consider joint degrees to be TNE (Knight and McNamara, 2017:44). A notable attempt to establish a clearer definition has been proposed by the United Kingdom's [Quality Assurance Agency \(2019\)](#), which defines three separate forms of TNE: (1). Distance learning; (2). International branch campuses; and (3). Partnerships that include franchises and validated centres. Despite efforts to determine a definitive framework, there remain difficulties in accurately capturing TNE activity. While such definitional issues place limitations on the comparability of research findings and international TNE data, this article aims to show that generalizable insights are still achievable through careful and systematic analysis.

In this article, two overarching modes of TNE delivery are delineated. Firstly, 'offshore TNE' is used to depict on campus education delivered in an overseas location, for which there are several different types of models and arrangements. Secondly, 'online TNE' is used to describe wholly online courses that are purposefully designed, in particular their curriculum, for students in an overseas country. In doing so, it is important to recognise that, while a course might be accessible because it is wholly online, it may not be appropriate for students in all countries and settings. Wholly online courses are often intentionally created for domestic students, even though they can be accessed by students outside the source country (Knight and McNamara, 2017:2). Further differentiation of the two modes of TNE is provided below.

Offshore TNE

Two broad categories of offshore TNE are apparent when considering course delivery – 'partner-supported delivery' and 'branch campuses'. Partner-supported delivery entails a local associate who assists in the provision of services to students, with this most likely involving on campus teaching, library services, information technology and organisational support. Associations can vary considerably, including with both public or private universities, commercial business arms of public institutions, not-for-profit companies, professional organisations and government departments or agencies (McBurnie and Ziguras, 2006:27).

In establishing formal relationships, there is a clear belief that local partners are best placed to help in providing awareness of how to work through administrative and governing obligations in the host country (Woodhouse, 2011). In attempting to lessen these difficulties, there has been increasing use of what is termed 'twinning'. Twinning involves a formal partnership that sees students fulfil the first element of their programme of study in the host country and, upon successful completion, finish their studies at the campus of the awarding institution in the provider country (McBurnie and Ziguras, 2006:27). An example, as of 2020, is the University of Wollongong, Australia, which has established twinning agreements with three Chinese universities. The University awards degrees that are fully recognised by the Chinese Ministry of Education (2020).

International branch campuses (IBCs) represent the second major component of offshore TNE. For most universities, an IBC involves a physical campus being established in the host country which is owned completely or in conjunction with the awarding institution. Course delivery occurs in a manner comparable to the institution's 'home' campuses, and often involves an increased proportion of teaching at an international campus (McBurnie and Ziguras, 2006:26). During the 1990s, IBCs were positively perceived as they appeared 'to give the home university more control over academic quality than a licensing arrangement' (Healey, 2020). For many universities, IBCs have become progressively less desirable as a TNE model due to the substantial financial investment required, and a potential for 'the academic goals of the university' to clash with the more 'overtly commercial objectives of its joint venture partner' (Healey, 2020). Several institutions have determined that IBCs are financially burdensome, highlighted by the 10 percent of all branch campuses subsequently ceasing operations (Wilkins and Juusola, 2018:72). Consequently, successful IBCs are likely to integrate local partners into delivery, an example

potentially being Dubai International Academic City which is now one of the largest education hubs in the world and where local support is provided for campuses to be established. Two Australian universities have a presence in Dubai International Academic City: Curtin University and Murdoch University.¹ Evidence suggests that focused or boutique approaches have a greater chance of success than large, single-university campuses (Bothwell, 2019). This would take on the characteristics of an office as opposed to a campus. One or two specialist programmes would be offered, that correspond to the demands of the domestic market, potentially with the assistance of a local partner. As travel slowly resumes after the initial phases of the pandemic, there is the possibility that IBCs will again be attractive as a form of TNE.

Online TNE

Online TNE is closely aligned to what has been termed ‘distance’ education. Distance education involves either ‘online or print-based distance education without face-to-face teaching’ (McBurnie and Ziguras, 2006:23). It has also been defined using the term Internationalisation at a Distance based on capturing ‘all forms of education across borders where students, their respective staff, and institutional provisions are separated by geographical distance and supported by technology’ (Mittelmeier et al., 2019: 2). Although online education is often deployed in conjunction with face-to-face modes in what is referred to as ‘blended’ learning, for investigative purposes, we seek to make a clear distinction between *wholly* online TNE and TNE that involves face-to-face teaching on campus, even though the latter may increasingly utilise online technology and tools for communication and interaction.

Online TNE in its early phases of development was thought likely to be particularly beneficial for higher education providers. A common perception was that ‘online courses would create a global distance education market, in which geographical limitations to access would disappear, allowing prospective students to choose between courses offered by providers in many different nations’ (Ziguras and McBurnie, 2011:108). Benefits relating to wholly online delivery of TNE have gradually contracted with a clear disconnect between the level of student demand for online TNE and the expectations of senior university administrators and other stakeholders (Ziguras and McBurnie, 2011:108). Subsequently, there have been moves towards establishing reduced scale and more focused online courses that directly relate to the needs of specific countries and groups of students, in contrast to the large scale online courses and Massive Online Open Courses (MOOCs). Although there is scope for MOOCs to create tailored offerings at scale, such as collaborative online professional development for teachers and healthcare professionals (Laurillard and Kennedy, forthcoming).

Scale and scope of transnational education prior to the coronavirus pandemic

Australia, together with the United Kingdom and the United States, has historically dominated the global provision of TNE. As Stephan Geifes and Susanne Kammüller (2018:9) argue, TNE has been ‘almost exclusively perceived as an Anglo-Saxon phenomenon. Australian, British, and American universities were the first to export and market their higher education programmes on a larger scale and have been active in this field for several decades’. It is for this reason that analytical discourse on ‘TNE for a long time centred mainly on examples from these sending countries’ (Geifes and Kammüller, 2018:9).

The United Kingdom has a robust sector-wide emphasis on TNE, with approximately 80 percent of higher education providers involved in some form of TNE, such as distance learning, partnerships or IBCs (Quality Assurance Agency, 2019). Although TNE is delivered to over 200

countries worldwide, China, Malaysia, Singapore, Pakistan and Nigeria are the major host countries (in descending order) (Universities UK, 2019). Offshore provision is separated into several distinct categories. IBCs account for 10 percent of students, collaborative provision makes up 44.3 percent, and articulated onshore partnerships represent 45 percent.² The United States in the past has made a clear distinction between IBCs and all other forms of offshore TNE, such as twinning programmes. IBCs are concentrated predominantly in China, the United Arab Emirates, Qatar, Canada and France. The United States and the United Kingdom are the two most significant providers of TNE globally and are ‘a source of 77 and 39 IBCs’ respectively, accounting for ‘47 percent of the world’s total IBCs’ (Mackie, 2019).

Australia has also placed a greater emphasis on IBCs, in addition to focussing on twinning and online learning programmes. Primary TNE partner countries are Singapore, Malaysia, China, Vietnam and the United Arab Emirates (Austrade, 2019; 2021). While Australian universities have preferred the IBC model, they have been less inclined than other countries to seek to develop ‘franchises’ or ‘twinning’ schemes and joint degrees, whereby a foreign partner provides the Australian university’s degree on its behalf, permitting differentiation and adaptation to local circumstances (for example, a localised curriculum) (Croucher et al., 2020).

Outside of the United Kingdom, the United States and Australia, there are a number of other significant TNE provider countries, predominantly in Europe. Of note are France and Germany. A report in 2016 noted that French institutions currently deliver just over ‘600 programmes abroad and operate 40 branch campuses worldwide’. This equates to 40 percent the country’s TNE enrolment in Asia according to the report. The rest is in Africa (30 percent) and the remainder in the Middle East. Much of France’s ‘current TNE activity is concentrated in countries and regions where it has a former colonial interest or other strong historical ties’ (ICEF Monitor, 2016). In relation to Germany, ‘at the beginning of the academic year 2018/2019, German universities and binational universities and institutes with German involvement reported a total 33,000 enrolled students in more than 280° programmes’ (Kammüller et al., 2020: 9). In terms of regional distribution, the largest share of students, with 61 percent, are enrolled in the Middle East and North Africa, followed by Asia with 20 percent, Central and South-Eastern Europe with 11 percent and Eastern Europe, Central Asia and the Southern Caucasus with 8 percent. An important distinction in the case of Germany is the rejection of ‘the more profit-oriented models of TNE, such as distance education, validation and franchising types’ and an emphasis on ‘capacity building of the education system in the host countries as part of Germany’s development co-operation policy’ (Ashour, 2018: 5).

Insights from an Australian case study

As a major provider of TNE, Australia offers a useful case study of the many current challenges and opportunities for transnational education around the world. Findings from this case study informed a report prepared by the authors in 2019. This involved a review of previous relevant analysis, an online survey sent to providers, a series of consultations with specialists and participants in the sector, economic analysis, and an examination of practice internationally in higher education. Fifty six Australian providers of higher education, including universities, were invited to complete the survey. Thirty nine completed it, representing a 70 percent response, including 32 or 82 percent of universities and seven or 41 percent of all non-university providers. Consultations involved 15 interviews with Australian higher education providers, key peak regulatory and professional bodies that captured most of Australia’s key higher education representative organisations and, hence, offer a significant insight into the views of sector experts and practitioners into Australian TNE. Further details can be found in Croucher et al. (2020).

Offshore TNE

When analysing global TNE it can be difficult to establish key commonalities between major provider countries. As established, these difficulties can be associated with key definition and data collection terminology differences. Notwithstanding challenges with the utilisation of direct comparisons between countries, examining current provision of Australian TNE indicates several features applicable to international practice. Currently, there is no industry standard or specific approach regarding the sector's TNE activities, and this differentiation means that it is doubtful that any such approach will be developed in the foreseeable future. This can be seen as predicated principally upon competition and commercial secrecy that exists between key providers in the sector (Croucher et al., 2020).³ Collaborations and delivery models are constantly in flux, making it difficult to accurately measure over time. Although there is often an exchange of best practice among higher education providers, it is not a significant focus of leading higher education representative bodies, with the exception of the International Education Association of Australia (IEAA) (Croucher et al., 2020). Even in the most recent Australian Government's Strategy for International Education it was noted that, while TNE has received increased attention, there was insufficient focus on enhancing the 'regulatory framework to allow for greater flexibility and to cultivate greater capabilities across the sector' (Yeزدani, 2021). In this respect, Australia is not unique as it tries to best manage the growing diversity and complexity of TNE. There is a range of novel and diverse risks facing providers along with an increasing number of competitor providers internationally.

It is important to consider provider perceptions when analysing Australian approaches to TNE delivery. In this respect, China was clearly the country most positively perceived by Australian providers as a TNE partner (Croucher et al., 2020). Among other major countries or territories positively perceived in descending order were Singapore, Vietnam, Sri Lanka, and Hong Kong. In contrast, South Africa was the country least positively perceived by providers. Several other countries not perceived positively in ascending order were Mauritius, Nepal and the Philippines. In common with the United Kingdom, there are similar positive perceptions of China and several other countries, such as Sri Lanka, Greece, United Arab Emirates, Zimbabwe and India. More negatively perceived were Malaysia, Singapore, Hong Kong, Egypt and Nigeria in response to a decline in student numbers (Universities UK, 2019). Of note is the extent that China is perceived as still having the potential for further growth, despite already being the largest host country for both Australian and United Kingdom TNE.

Complexities in the provision of Australian offshore TNE

When examining Australian TNE and provision internationally, a key common challenge emerges. This challenge derives from compliance with the rules and regulations of host countries. In the Australian case study, key examples of this were national internet firewalls, programme approval and taxation rules (Croucher et al., 2020). Further exacerbating this issue is the difficulty in certain countries of monitoring and accessing funds, thereby contributing to sovereign risk as a potential issue of concern. Such concerns are consistent with international analysis which notes the challenges involved in 'working with foreign partners that have very different motivations, usually short-term profit maximisation. It means operating in an alien environment, where the host country's legislation, business practices, political systems and social culture (including religion) are very different, overlaid by the challenges of working in a foreign language' (Healey, 2020:7).

Through seeking to expand TNE provision internationally, Australian providers are entering an increasingly diverse range of countries enhancing already established challenges. An example are the problems in the ability to achieve conformity with legal and regulatory requirements at both a

regional and national level faced by smaller and non-university providers, which may act to dampen their desire to expand into new countries, such as India (Croucher et al., 2020). If a partnership can be established, there is some likelihood of delay in its enactment due to uncertain or inadequately formed regulatory structures in many partner countries. This assessment is consistent with recent analysis by Austrade (2019:6), the Australian Trade and Investment Commission, in which it is suggested that the ‘higher financial and reputational risks associated with operating offshore’ needs to be taken into account, with this occurring in addition to course affordability for local students and the ‘potential increased cost of delivery offshore’.

Contributing to the key challenge of compliance with the regulations of host countries is the accuracy of available data. Sporadic and unsystematic data collection remains an issue particularly as it ‘makes in-depth and sophisticated quantitative analyses difficult’ (Ziguras and McBurnie, 2011:106). In this context, it is important to note Australia’s position as the only country that, on a regular basis, collects data on offshore student enrolments. Not having access to accurate data can intensify other known complexities in the successful maintenance of partnerships. Amongst major complexities known to be faced by higher education providers seeking to offer a degree in another country are likely to be issues with legislative, cultural and political environments (Bentley et al., 2017:342). Confusion between those involved in TNE partnerships regarding what constitutes offshore, and online delivery can further enhance such complexities. This can make establishing equivalence in standards increasingly complicated.

In addition to achieving regulatory compliance there is the corresponding need of providers to tailor courses to meet the education and employment needs of particular groups of students. In the case of Singapore, it has been suggested by Austrade (2018) that programmes could be offered that are directly relevant to its developing industries, namely cybersecurity, data analytics, the ‘internet of things’, education and more pioneering approaches to industry-specific training. A complexity, however, is that offshore TNE partners often prefer to utilise ‘traditional’ means of course delivery that necessitate a significant on-campus component. A recent study of Malaysian TNE students has found that the highest level of satisfaction was more prevalent among ‘students and graduates who engaged in offshore programmes at a UK branch campus. This is attributed to reasons such as direct learning and contact with a well-recognised UK university, a self-contained campus with good academic and recreational facilities, and an international mix of students and staff’ (Sin et al., 2019:142). In contrast, Australian providers tend to want to utilise a more disparate and innovative range of pedagogical methods including technology-enhanced learning.

In supporting both the desires of host countries and students there has been a tendency for Australian providers to seek partnerships with locally based institutions that provide and maintain physical infrastructure. In seeking to develop IBCs historically, Australian providers were less inclined to take the initiative in establishing ‘franchises’ or ‘twinning’ ventures and joint degrees, where a foreign partner delivers the Australian university’s degree on its behalf. In recent years there has been tendency towards a diversification in the types of partnerships being established. This is likely strongly correlated with the closure of six major Australian IBCs in countries such as in Fiji, New Zealand, Singapore, South Africa and the United Arab Emirates (C-BERT, 2017).

Facilitators of Australian Offshore TNE

A key enabler to building successful partnerships is a clear line of communication between the host and partner institutions. Australian TNE providers emphasise a focused approach to instituting partnerships that clearly seeks out a particular country or region and also eschews competition with providers already established (Croucher et al., 2020).⁴ In the case of Indonesia, TNE programmes allow ‘Australian universities to diversify their market and establish alternative entry pathways for Indonesian students into the Australian universities’, with partnerships tending to be ‘pragmatic and

managed like a commercial enterprise' (Sutrisno and Pillay, 2017). The decision of Monash University to open a campus in Jakarta in Indonesia may be seen as an example of this, given it is predicated on 'cross campus collaboration for research purposes and mobility in education' (Monash University, 2020). An additional example has been Curtin Malaysia's position as the 'first international university to secure the Malaysian Central Government's research fund' meaning that it has 'more potential sources of revenue/additional business opportunities' (Riad Shams, 2017: 149). Important in such partnerships is maintaining strong personal or institutional links that are predicated on mutual trust with both parties having clear knowledge about the exact nature of the TNE partnership. An important concern in this context is guaranteeing successful engagement with students throughout their involvement in TNE programmes.

Enhancing communication is an emphasis on robust quality assurance for TNE programmes. As a result, having staff with adequate qualifications and experience of teaching at local partner institutions is of particular value, when sourcing them from Australia is not feasible. Access to appropriately qualified local staff may assist in developing good working relationships with the authorities in the host country, including those responsible for quality assurance. In the case of Indonesia, it is suggested that 'there needs to be quality assurance process/checks in place to protect the Australian university's reputation. In doing so, there might be instances where knowledge transfer could take place, leading to quality improvement' for the partnering university (Sutrisno and Pillay, 2017:54).

As already established, maintaining access to accurate data to assess the ongoing viability of TNE partnerships remains of utmost importance. Particularly valuable is the role of the Australian regulator, the Tertiary Education Quality and Standards Agency (TEQSA), in monitoring TNE activity. TEQSA's brief is 'a natural expansion of quality assurance on a national scale is to ensure that the reputation and quality of the Australian higher education sector is protected into the future' (Sooontiens and Pedigo, 2013:44). In an international context, the British Council is also perceived by Australian TNE providers as an effective example of facilitating harmonization both between key government departments and between these agencies and TNE providers (Croucher et al., 2020).

Online TNE

For over 20 years, online education provision has been a major component of TNE delivery. Since the mid-2000s, a major contributor to this development has been MOOCs. 'MOOCs have made possible the expansion of how universities reach out to the world' with this growth due to 'the increasing speed and accessibility of the internet, and the growing IT literacy of the world's population' (Lim and Shah, 2017:259). An example is the way universities join with MOOC providers (for example Coursera, edX, FutureLearn) or specific online programme managers (for example 2U, Wiley, Pearson, Keypath Education) in supporting wholly online programme course delivery. As MOOCs have evolved, they have moved from a position of 'no prerequisites or admission requirements, no fees to students, minimal interaction with faculty, and ... no academic credit' to some providers now offering, for a fee, 'academic credit for successful completion of courses' (Amani Annabi and Wilkins, 2016:961). In Australia, MOOCs have allowed individual universities to develop entirely online programmes that are targeted to both local and international students (for example Swinburne Online and providers partnering with Open Universities Australia).

Despite their potential, MOOCs still constitute a relatively small component of overall provision. Of the Australia providers surveyed that had developed MOOCs, Chinese students are a significant focus group, across a diverse range of disciplines (Croucher et al., 2020). MOOCs are perceived by many education providers as a means for future students to gain a sense of Australian education provision before arriving onshore. The University of Sydney's *Communication skills for university success* is a clear example in the manner it aims to prepare students for

undergraduate study at an English-speaking university. It has also been noted, however, that several universities internationally are considering MOOCs ‘as informal or formal introductions to credit-bearing courses and qualifications, which can be taken forward into TNE partnerships’ (Henderson et al., 2017:13). This could provide ‘a win-win scenario in which the MOOC creators achieve revenue, and the receiving institutions receive a high-quality learning resource at a relatively low cost’ (Amani Annabi and Wilkins, 2016:970).

Complexities in the provision of online TNE

A major concern for the viability of online provision is the overestimation of the desire for online TNE on behalf of providers (Zigarus and McBurnie 2011:108). A key indication of the lack of student demand is the continuing reality that online education is perceived by prospective students as substandard compared to on campus provision, and that many foreign distance/online education programmes are not recognised by several countries due to a lack of face-to-face and on campus teaching (Wilkins and Juusola, 2018:71).

The maintenance of both effective pricing and course delivery standards remains a significant challenge for online TNE. In particular, there is an ongoing need to effectively engage staff with expertise in online TNE delivery. It has been argued that engagement by providers with ‘their own IT staff in TNE developments is uneven’ meaning this is ‘an increasingly important area to manage to ensure a positive student experience’ (Henderson et al., 2017:17). Difficulties in appropriate resourcing of online TNE are aggravated through the complexity of copyright compliance and provider concerns about the potential loss of intellectual property.

There often remains scepticism among TNE providers about online courses that derives from the reality that successful online TNE requires a level of resources that is comparable to offshore TNE. This is of greater importance when contemplating the differing abilities of students across countries and the requirement to maintain uniformity in course delivery. Research shows that positive student experience of online courses is underpinned by high-quality learning design; that is, the types of tasks, activities and assessments that students are expected to complete (in order to achieve the desired learning outcomes), the order in which these activities are sequenced throughout the duration of the course (so that learning builds on prior knowledge), and the type of interactions they create/enable, for example, between the teacher and student, between the student and their peers, or between the student and online content. Evidence suggests all three types of interaction are critical for online student engagement (Kennedy, 2020). However, a well-designed online course with a range of synchronous and asynchronous activities for student and teacher interaction, together with a rich variety of online resources to support student learning, takes significant effort and time to design. For example, it might involve: a learning designer (a specialist in online pedagogy) working with the university teacher/academic to design appropriate content and tasks aligned to intended learning outcomes; an educational technologist to develop bespoke technology-enhanced resources/activities (i.e. quizzes, video, interactives) for the course; or professional development for the teacher to learn online pedagogical skills.

Based on an example of TNE partnership in Malaysia, it was suggested by Keevers et al. (2019) that a more multidimensional approach is required. This is predicated on a close partnership that features frequent dialogue, close coordination in course delivery, careful monitoring of standards, tailoring curriculum for local students and a strong emphasis on intercultural learning (Keevers et al., 2019:2). As an example, this partnership shows how TNE collaboration needs to involve customisation for students in each individual country. This is regardless of whether course delivery occurs on campus, in a blended form or wholly online. In sum, the development of online TNE partnerships requires ‘a high level of commitment across the organisation to ensure there is sufficient commitment to implement successfully’ (Henderson et al., 2017:15).

Effective online TNE provision

There likely remain opportunities for the further provision of online TNE irrespective of the constraints placed on other forms of higher education delivery due to the COVID-19 pandemic. Additional opportunities are predicated on the assessment that it is increasingly ‘more effective, or at least as effective as traditional classroom instruction’ (Siemens et al., 2015:34). The likelihood of improved perceptions of online TNE is based on its increased ‘popularity among working professionals for undertaking postgraduate education’ and the development of more sophisticated and well-established quality assurance models (Gemmell and Harrison, 2017:66–67).

With improved perceptions of online TNE comes a corresponding need for diligence in establishing and maintaining partnerships. It has been suggested that the extent to which a partnership approach is always consistent with online TNE delivery is questionable due to the intrinsic nature of its development and delivery (Deloitte Access Economics, 2015:35). The viability of courses that utilise online delivery is highly dependent on the provider, partner and students being able to effectively utilise new technologies and media. Access to enhanced internet speed in major online TNE recipient countries is a significant development in countering these concerns (Croucher et al., 2020). As part of this process the providing institution will need to provide management of course delivery for students and may have to deliver training and development for local staff (Ziguras and McBurnie, 2011:120).

Emerging TNE trends during the COVID-19 pandemic

Offshore TNE during and after the COVID-19 pandemic

The preservation of close relationships is likely to be of even greater importance should COVID-19 related restrictions continue to be imposed on international students’ ability to travel internationally. This is particularly the case with regard to Australia where, as of early 2021, its borders are closed to international students. Modelling suggests ‘that Australia’s universities face a cumulative loss of between \$10 billion to \$19 billion from 2020–2023 because of the collapse in international student revenue’ (Hurley and Van Dyke, 2020:3). One estimation by Simon Marginson is that, it will take up to 5 years for such revenue to return (Stacey, 2020). An additional complicating factor is the maintenance of bilateral relationships with key TNE recipient countries in the context of broader political tensions. Australia’s relationship with China is a key example of this situation whereby the deterioration of political ties may impact on TNE provision. This is based on the Chinese Ministry of Education’s decision to publicly question the quality of courses delivered by Australian providers, prior to the COVID-19 pandemic, and potentially ‘audit the quality of Australian university courses delivered in China’ (Dodd, 2021). China has already applied trade sanctions to Australian industries such as barley, beef, coal, wheat, wool, lobsters, sugar, copper, timber and table grapes, so it remains to be seen whether any such actions will be extended to the education sector and, in particular, TNE provision (Wilson, 2021). This is of critical interest in relation to TNE, given the significance of Chinese students to international education in Australia, where they constitute the largest single group.

The pandemic does offer opportunities for TNE to be reconceptualised. In particular, it has been suggested by Jenny Lee that ‘for too long transnational education has been the little sister to traditional forms of international student enrolment, which institutions rely heavily upon to subsidise operation costs’ (Mitchell, 2020). Given the perceived risks associated with the international student market, it is possible that Australian universities could place increasing emphasis on TNE. Recent research by Universities UK (2020a) of Pro-Vice-Chancellors (International) indicates that 50 percent thought that they were likely to expand existing TNE in

response to COVID-19. It has been suggested that ‘TNE can be a cornerstone of the rebuilding phase that the international education system is approaching. If done right, TNE will have a key role to play in enhancing institutional resilience and rebuilding our international education sector in perhaps more sustainable ways’ (Universities UK, 2020b). In seeking to foster new partnerships in country, however, it is important to remember that due diligence is still a core component of any additional emphasis on TNE. ‘Australian universities that have more mature TNE programme partnerships tend to realise that TNE programmes should not merely focus on seeking short-term financial benefits’ (Sutrisno and Pillay, 2017:55). This indicates that any rush towards establishing new partnerships must involve an element of caution.

An important factor in the future evolution of offshore TNE is significant improvements in communications technology. Increasingly improved technology, such as that associated with 4G and 5G networks, particularly in East and Southeast Asia, is seen by providers in Australia as being particularly beneficial in building and sustaining TNE partnership. In the case of Malaysia, Austrade has suggested that, due to the COVID-19 pandemic, students are more likely to stay locally and study a degree from a foreign provider. There is already an emphasis on ‘flexible pathway developments to help students circumvent travel restrictions’, with ‘opportunities for further TNE collaborations between local and foreign institutions like Australia’ likely to continue (Austrade, 2020). It has also been suggested by the Chancellor of the University of Queensland, Peter Varghese, that ‘universities might offer hybrid courses in future that involved some study in the home country and a residential element in Australia’ but this could ‘mean charging a lower rate’ for tuition fees (Bolton, 2020). This again demonstrates the need for innovative responses to the provision of TNE during and subsequent to the pandemic.

Online TNE during and after the COVID-19 pandemic

As a component of TNE, online delivery is likely to feature prominently in the future. The global online education market, prior to the emergence of the COVID-19 pandemic, was projected to have a growth rate of 9.23 percent and ‘to reach a total market size of US\$319.167 billion in 2025, increasing from US\$187.877 billion in 2019’ (Research and Markets, 2020). In the context of COVID-19, there have been suggestions that providers ‘should focus on introducing more flexible admissions processes and strengthening their communications strategies to mitigate any potential damage from the coronavirus crisis’ (Bothwell, 2020). Also, notable is some of the more innovative responses of particular providers. Coursera has made ‘its entire course catalogue free to universities worldwide, while edX has launched its Remote Access Programme, which will provide students of its partner institutions with free access to courses and programmes from all edX partners participating in the initiative, not just their own institution’ (Bothwell, 2020).

The potential for the growth of MOOCs and fee-paying online courses is likely to be predicated on the cultural and pedagogical needs of specific groups of prospective students. If an effective price-point can be found at scale, this would open online TNE to students with comparatively lower financial resources. There have been suggestions that microcredentials – accreditation for the completion of smaller or more targeted elements of learning – are likely to be at the forefront of growth in TNE. This assessment is consistent with the expansion of the ‘global market for continuing professional development’ and the likelihood of ‘pedagogical models that blur the boundaries between on-the-job training and full postgraduate programmes’ (Ziguras, 2018). It is notable in an Australian context that the government has created the National Microcredential Marketplace which involves ‘a nationally consistent platform to compare course outcomes, duration, mode of delivery and credit point value’ (Teahan, 2020a). Such an emphasis, although domestically orientated initially, is intended to provide a basis for providers to offer similar courses internationally. The Australian Minister for Education, Dan Teahan (2020b), has suggested

that, as part of its international education strategy, the government wants ‘more focus on offshore, online and blended learning, and a growth in new models of delivery – such as micro-credentials’. A fundamentally important development in this context is the five-year strategic agreement that has been signed by Austrade with FutureLearn to offer microcredentials and online short courses using its platform.

Recent developments have given some indication of how the duration of the pandemic may impact on the growth of online TNE. It is important to note that the COVID-19 crisis has forced face-to-face courses to move online in a matter of weeks, sometimes days, meaning international students have become ‘de facto’ TNE students as they continue their education from their home countries. In this context, it has been suggested that providers utilise the expertise of TNE practitioners in managing programmes remotely. ‘Partnerships teams within universities are experts at creating communities of students and scholars through digital means, adapting VLEs [Virtual Learning Environments], asynchronous learning and meetings to accommodate students who study in a wide variety of places and ways’ (Universities UK, 2020a).

It is notable that China has, albeit perhaps temporarily, relaxed restrictions on the recognition of online course delivery in response to the pandemic. Also, in the context of the UK, there has been an emphasis that ‘TNE providers need to make sure that the quality and integrity of teaching and assessments does not suffer as a result of moving to distance online learning’ and ‘they also need to factor in any accessibility constraints of students and staff and keep an eye on regulations operating in the country for online distance learning’ (Universities UK, 2020b). Beyond regulatory compliance, there also remains the issue of negative perceptions of online TNE. The Chancellor of the University of Queensland, Peter Varghese has noted that ‘it’s hard to see international students just wanting an online course. Their purpose is being here [Australia], going to a good institution, learning the English language’ (Bolton, 2020).

Developing future opportunities for online TNE is likely to necessitate focusing on existing concerns regarding value and applicability, in conjunction with strategies that ensure that course content is in close alignment with the cultural and educational needs with the particular country. In best positioning themselves, providers will need to adopt strategies that recognise and address the many challenges discussed in this section, such as establishing effective online platforms for collaboration with providers that help assist in the development of increasingly sophisticated forms of learning.

TNE into the future

TNE has evolved substantially in a relatively short period of time, particularly with changes to partnerships and delivery models. In examining this evolution, this article presents an analysis of the challenges and prospects for offshore and wholly online TNE for higher education providers, using Australia as a case study. Several issues and risks are identified as pertinent for parties involved in developing, promoting, and supporting TNE provision. Importantly, there also remain uncertainties around, for example, the ability to contain tensions in key bilateral relationships such as that between Australia and China. Some recognition of this issue has emerged in the Australian Government’s 2021 Strategy for International Education and its identification of the need for diversification in student markets. This has been followed by a more recent campaign by Austrade to highlight TNE opportunities in South Asia inviting Australian institutions to ‘capitalise on growing opportunities in the TNE space. There has been a positive shift in the regulatory environment and student preferences for blended learning models, accentuated by the pandemic’ (2021).

Developing future high-quality TNE could be facilitated by involving significant stakeholders, including those from receiving countries, in reflecting on the motivations, facilitators, barriers, forecasts, and phase of growth of online provision. With the COVID-19 pandemic, there is an

opportunity to encourage the advancement of high value wholly online TNE provision to challenge perceptions that it is substandard to domestic on-campus education provision. Individual providers are not likely to be able to influence such perceptions on their own, but they could be assisted through collective action by government and regulatory bodies (with the support of providers). This is exemplified by the role of the British Council in supporting and promoting United Kingdom TNE, in addition to assisting coordination both between key government departments and agencies, and TNE providers.

The motivations and rationales for initiating TNE arrangements are diverse, but the most successful partnerships are predicated on careful planning. They appear to involve the targeting of a specific country, particular groups of students, specific skills needs and, in some cases, avoiding competition with existing providers. Effective arrangements consist of regular dialogue, close collaboration in delivery, careful assurance of quality and standards, tailoring curricula for local needs and a strong emphasis on intercultural learning.

Conclusion

The assessment offered in this article points to a more fundamental complexity of discussing TNE as a distinct category of educational provision. Including a wide variety of different types of provision under the label TNE can be, at best, unhelpful and, at worst, potentially misleading, especially when it comes to the inclusion of wholly online provision. It is therefore likely to be more constructive to analyse TNE arrangements as a range of relationships in themselves rather than as a single discrete mode of higher education delivery.

This is particularly the case for partnerships, which represent a range of relationships that include wholly online TNE, as well as various forms of offshore TNE. In *wholly online* TNE, the relationships might be between providers and students, their prospective (and in the case of some part-time students, their current) employers, their governments, and any sponsorship organisations, for example. In *offshore* TNE, they may be with local providers, local and offshore staff, local authorities responsible for education services and, again, employers and governments. For both forms of TNE, it is important that providers understand the national and local context particularly as pertains to key markets such as China, build these relationships in ways that are mutually beneficial and maintain transparency in all dealings with partners. These collaborations and delivery arrangements may be in constant flux due to changes in the local context, shifts in the geopolitical climate and the developing impacts of the COVID-19 pandemic. So, it is not so much the *mode* of provision (for example, international branch campus, franchised or validated provision, and wholly online learning) that matters, but the *nature of the partnerships and the relationships* formed and sustained over time.

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Notes

1. Another well-known example of this is Education City in Qatar.
2. Registered at an overseas partner organisation – studying overseas for an award of the articulating provider.

3. Interviews as part of this report indicated this as an issue.
4. Interviews with Australian providers corroborated this assertion.

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