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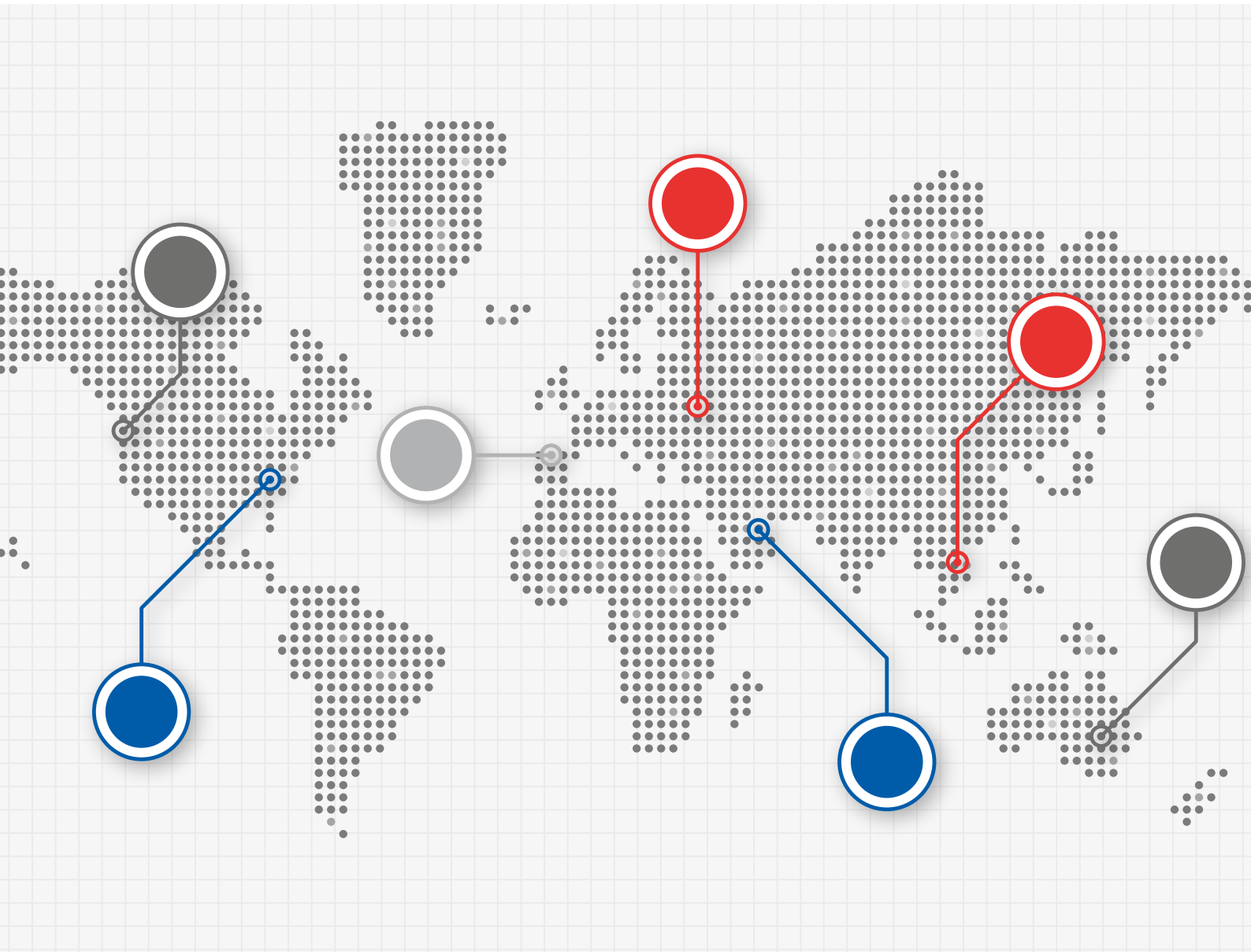
Global Geographies of Offshore Campuses



Research Group “TRANSEDU”:
Constructing Transnational Spaces of Higher Education

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Foreword

The internationalisation of higher education institutions has received much attention. Our report presents new data on the geographies of the physical presences of universities, or offshore campuses, around the world. While globalisation is increasingly coming under political pressure, our figures show an uninterrupted rise in the number of physical presences and an increasing diversification of universities' countries of origin as well as their locations abroad. Our data over time show the volatility of investments – many campuses have closed after a few years of operation.

Whereas many publications have listed the countries of origin of higher education institutions venturing abroad and countries that appear on the global map of transnational education through their ambition to become "education hubs", we show some of the finer-grained geographies of the global offshore campus phenomenon: universities are largely urban phenomena, so we focus on the cities that receive investments and zoom in on the governmental and private sector projects that cluster offshore campuses in transnational education zones.

We hope the systematic data-collection and analysis conducted by our research team TRANSEDU at the Leibniz Institute for Research on Society and Space can contribute to debate and policy-making, addressing the future of transnational education in countries that engage in export, import or both. We hope you enjoy the ride through the figures and facts of contemporary geographies of offshore campuses.

Sincerely,

Dr. Jana M. Kleibert
Alice Bobée
Tim Rottleb
Marc Schulze

On behalf of the Research Group "TRANSEDU"

Leibniz Institute for Research on Society and Space (IRS)

Executive summary

- **There are 487 offshore campuses** (physical presences of foreign degree-awarding higher education institutions) globally, with at least 14 more planned to open soon.

- **Offshore campus growth has been continuously strong since 1989** with on average double-digit growth figures until 2009 and a lower growth over the last ten years. In total, 58 offshore campus closures occurred, primarily over the past fifteen years.

- **Most campuses stem from higher education institutions in France (122), the US (105), and the UK (73)**, followed with some distance by Australia and Russia (both 19). Over time, we see a diversification of sending countries. The share of the five major exporters shrank from 90% in 1990 to 70% in 2010.

- **Most exporting higher education institutions are from the US (61), the UK (46), and France (29).** Many only set up one or two campuses, but some higher education institutions form large international campus networks with up to 34 offshore campuses, in particular from France.

- **Offshore campuses are located primarily in three regions: Europe, the West Asia and North Africa region ("Middle East") and East and Southeast Asia.** The main destination countries for offshore campuses are China (67), the United Arab Emirates (44), Singapore (19), Malaysia and Spain (both 17). Campuses are not solely exported from the Global North to the Global South. European countries and cities feature prominently as importers as well as exporters of campuses, in particular the cities of London and Paris.

- **Offshore campuses are highly concentrated in few major cities, most importantly Dubai (29), Singapore (19), Shanghai (15), London and Doha (both 12).** In several cases, one city accounts for a significant share of all offshore campuses (Dubai has 66% of all the United Arab Emirates' and London 80% of the UK's total offshore campuses).

- **Clusters of offshore campuses are formed as part of explicit inward investment strategies of "transnational education hubs"**, for instance, Education City (Qatar), Dubai International Academic City (United Arab Emirates), EduCity Iskandar (Malaysia) and Uniciti Education Hub (Mauritius). While only around 10% of all offshore campuses worldwide are located in these transnational education zones, these projects often attract special global attention.

Definition and methodology

Offshore campuses: higher education institutions crossing national borders

Offshore campuses come in different shapes: from large-scale campuses reproducing the infrastructure of the parent institutions to smaller offices teaching individual programmes abroad. They are embedded in complex governance structures, depending on the internationalisation strategies pursued by exporting institutions and the ambitions of governments to attract investments. Existing research and policy reports have struggled with defining the phenomenon and different terms have proliferated. The British Council and the German Academic Exchange Service[1] address the "TNE [transnational education] terminology chaos" that has led to "mass confusion about what is meant by an international branch campus, franchise programmes, joint/double degree programmes, distance education, and joint universities" (p.1). All these forms of transnational education include academic programmes and providers that move abroad to the students, rather than the students moving abroad.

The British Council and the DAAD define offshore campuses as an independent form of transnational education, which means that these offshore campuses have full control over campus development, curriculum, quality assurance and qualification. Yet, physical presences of higher education institutions abroad are not always fully-owned subordinate "branches" of existing higher education institutions. Even if developed and operated solely by the foreign institution, the term "international branch campus" is sometimes regarded as derogatory: some universities would see their multiple campuses as being equal parts of "one campus" instead of a headquarter-branch hierarchy. Practitioners may also avoid the "branch" term because of negative public connotations, and may brand foreign campuses as "centres" or "international hubs".

To sidestep some of these concerns, we use the term offshore campuses, which we define as physical presences of higher education institutions abroad that provide international degree programmes and operate independently or in collaboration with business and/or academic partners. The definition differentiates offshore campuses from other forms of transnational education without physical presences (online learning) or collaborative partnerships of existing institutions (joint degrees), which do not require new physical infrastructures abroad. Offshoring is a term borrowed from international business literature to signify the transfer of a firms' activity across national borders. We thus exclude newly founded institutions (such as bi-national universities and universities named

1 Knight, J. and McNamara, J. British Council and DAAD (2017). Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM).

"American University of" or "German University of"), as long as these cannot be traced to an exporting foreign higher education institution. Also excluded are sites set up exclusively for short-term study-abroad and summer programmes of individual institutions, as these do not offer academic degree programmes abroad. Based on definition and the data available, our report aims to map all existing offshore campuses worldwide.

Mapping offshore campuses

The offshore campus mapping in this report is based on an extensive desktop research conducted between June 2018 and April 2020.

We started our analysis with an existing database of the United States-based Cross-Border Education Research Team (C-BERT). Their online listing of international branch campuses is widely referenced in debates about the phenomenon but was last updated in January 2017, listing 313 campuses.[2]

The extensive but not exhaustive database lists institution names, the importing and the country of origin, and provides a factsheet on the campuses as well as a link to their websites. In our database we list 559 offshore campuses. 487 are open and running in 2020, 58 had closed and 14 are announced or under development but not yet open. Comparing ours and C-BERT's data we found that 273 campuses appear in both databases, while 38 campuses listed by C-BERT were either found to be closed, not fitting our definition or had disappeared from the internet (see box "Ghost campuses").

Our database includes the following categories:

- Name of offshore campus
- Name of exporting higher education institution
- Country of origin of offshore campus
- City of origin of offshore campus
- Country of destination of offshore campus
- City of destination of offshore campus
- Opening year of offshore campus
- Website of offshore campus

If applicable:

- Closing year of offshore campus
- Transnational education zone[3] the campus is located in

We used search engines for tracking key words such as "international (branch) campus", "offshore campus", "global campus" or "campus abroad" in combination with names of countries or of specific

2 Cross-Border Education Research Team (updated 20 January 2017). C-BERT Branch Campus Listing. Data originally collected by Kinser, K. and Lane, J.

3 Areas often branded as education cities or education hubs. In this report we use the term transnational education zone (TEZ). See Section 5.E.

higher education institutions. Beyond university websites we also explored media articles and social media pages to triangulate data. The multilingual team (German, English, French, Spanish, Arabic and Dutch) was complemented by translators for Russian and Mandarin websites. The accuracy of the research is suspected to be higher in the regions that our research group has in-depth expertise on, for example through qualitative research in France, the United Kingdom, Germany, the West Asia and North Africa region or Southeast Asia.

Obvious limitations apply to this method of data collection. First, a database requires classifications along clear-cut categories. Yet, offshore campus development is a phenomenon reflecting a very broad variety of governance models, investment strategies and physical structures. Second, in our desktop research we largely relied on institutions' own website representations. Third, the developing character of the phenomenon makes it a moving target. If in doubt, cases of classifications were discussed in team, ensuring the validity of the entries.

Given these challenges in data collection we will neither claim universal completeness of all existing offshore campuses nor of all the complex institutional structures that offshore campus development can take. However, our database permits identifying overarching trends and reveals new geographical and temporal patterns of the phenomenon. This, we believe, contributes meaningfully to develop a more diverse and nuanced picture of the geographies of offshore campuses.

"Ghost campuses"

Some offshore campuses are announced but never realised

Desktop research on offshore campuses picks up many joyful announcements of planned campuses that never materialise. Sometimes their development is stopped in its tracks like it was the case with Warwick University, which was facing difficulties with local regulation in California. Other campuses appear to have vanished: no information is found on whether they are still operating, or they cannot be traced on their supposed parent institutions' websites. We call these campuses "ghost campuses".

Those announced-but-never-established campuses take a turn for the weirder when government agendas are involved, as recently observed in the case of Egypt. The country is heavily promoting the Knowledge Hub project. This multi-university campus is planned to become part of the yet to be completed mega project of Egypt's new administrative capital. In 2017 and 2018, the government announced persistently that six offshore campuses from the United States, United Kingdom, Hungary, Canada, Sweden and France would soon open in the country. When the media outlet Middle East Eye[4] investigated these claims, most of the universities in question strongly denied that such plans existed. In other words, offshore campus development is not only related to universities' strategies. Rather, governments strategically employ the projects' publicity effect for national development plans.

4 Ibrahim, A. and Ullah, A. Middle East Eye (published 6 March 2018). Egypt makes bogus claims to lure UK universities to new multi-billion city.

Nottingham sign in Semenyih near Kuala Lumpur, Malaysia. // Photo: Marc Schulze

Offshore campus architecture and locations

Offshore campuses vary significantly in terms of their physical infrastructures, architectures and locations. While some offshore campuses are very visible from the outside and advertise themselves with large signs on their buildings, others are located inside other universities or within larger building complexes with only a name on the mailbox indicating their presence. Also, campuses' forms range from few rooms on an office floor of a high-rise building to large university complexes designed by star architects including sports facilities, dormitories, laboratories and so forth.

Similarly, location, accessibility and connectivity to the urban surroundings differ. While some offshore campuses are strategically placed in designated areas (for example in transnational education zones), other universities look for individual sites that better fit their particular profile. Some are located outside of a city or in newly developed neighbourhoods, while others moved to inner city locations and financial districts. Whereas some campuses are fenced off with multiple security measures to be passed, others are open to the public.

Offshore campuses show great variety in architecture and location choice"

The choice for building type and its spatial composition depends both on the regional context and on the university's business model. Some universities are willing and capable to take the financial risk of constructing a costly university building, while in other cases it is part of the government's strategy in the destination to provide land and/or existing buildings at reduced or even no costs to the university. Similarly, a location close to a central business district might make sense for a university that plans to offer executive education, while others might benefit from the campus atmosphere created by the agglomeration of multiple universities.

1 – Geographical trends

1.A – Origins of offshore campuses in major importing countries

Most offshore campuses have Western origins

Figure 1.A depicts the five countries which have imported most offshore campuses globally and shows in pie charts where most of the campuses come from. For example, in China 24 offshore campuses were established by universities from the United States (US), 14 come from France, 11 from the United Kingdom (UK) and four from the Netherlands. Although the UK is only the third largest exporter of offshore campuses globally, UK universities are the most represented ones in Malaysia, Singapore and the United Arab Emirates (UAE). In comparison, French higher education institutions, the major campus exporters globally, do not present the largest group in any of the five major importing countries. Both the UK and France have exported campuses to each of the five countries. Universities from the other major exporting countries seem to be more selective. The US for example, globally the second largest exporter, has exported campuses in only three of the five countries in Figure 1.A, but is by far the dominant provider in China, the main importer of campuses.

Campus export sometimes follows regionally specific patterns: Indian offshore campuses are the second largest group in the UAE and Swiss universities are the main group in Spain. Moreover, in some countries such as Singapore or

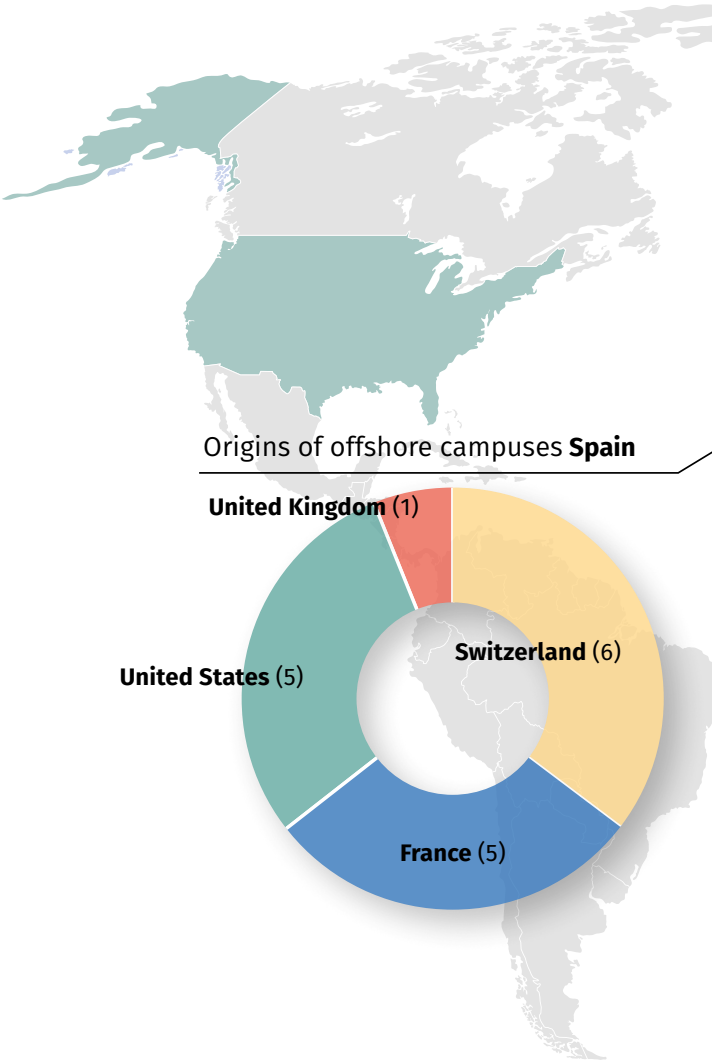
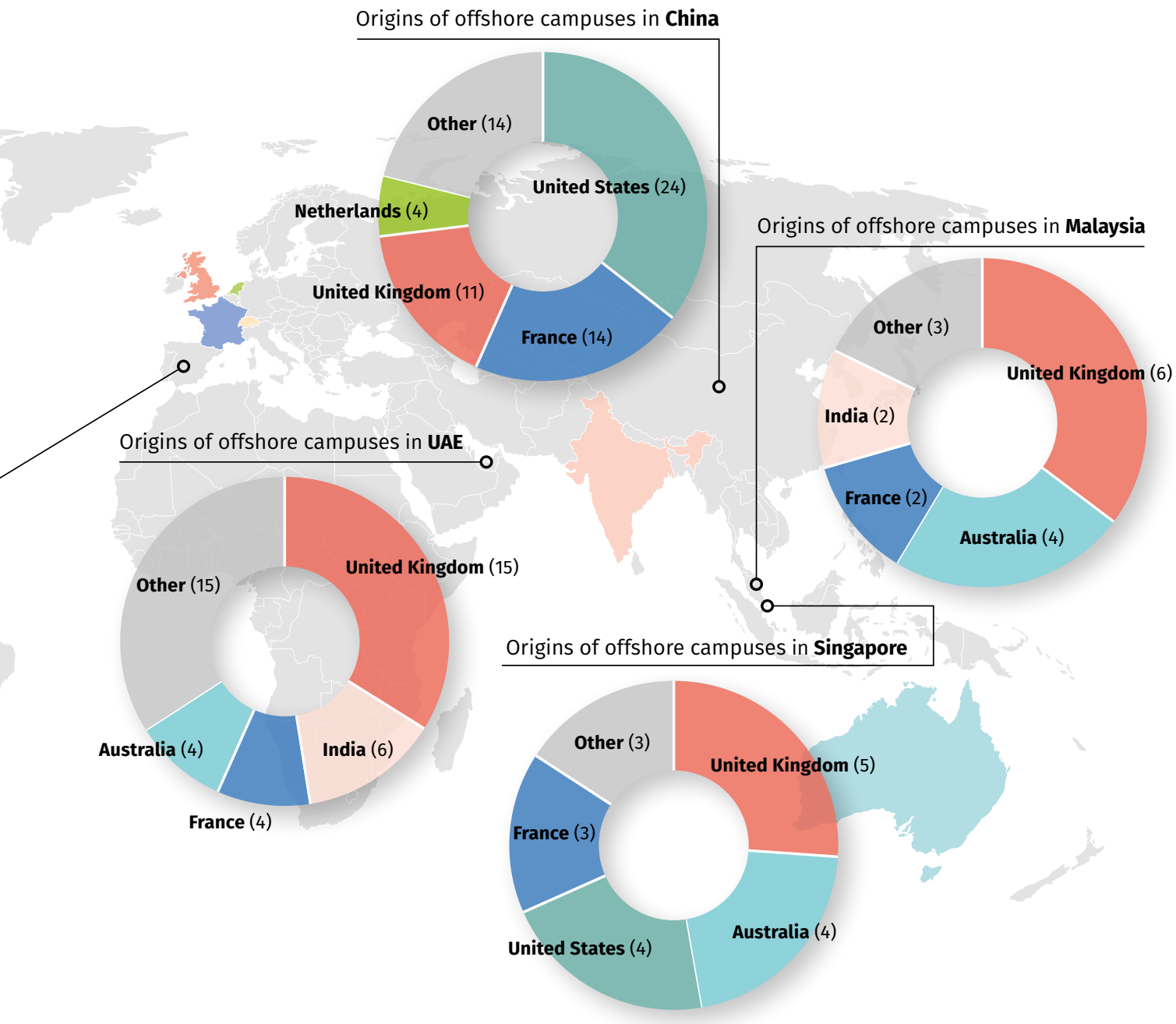


Figure 1.A: Origins of offshore campuses in major importing countries

Spain, we observe a rather even distribution among the campuses' countries of origin. In other countries certain campus origins are more dominant, such as US campuses in China or UK universities in the UAE. Overall, offshore campuses in the major global destinations have mostly Western origins despite regional particularities as illustrated with Indian campuses in the UAE.



1.B – Destinations of offshore campuses from major exporting countries

Figure 1.B depicts the major destinations for campus export in each of the major exporting countries. In 2020, the major exporters of offshore campuses are France, the United States (US), the United Kingdom (UK), Australia and Russia. However, not all of them exported their campuses to the same destinations. For instance, Russian campuses are almost all located in former Soviet countries – not commonly referred to as major destinations of transnational higher education. With 24 campuses from the US and 14 from France, China is the preferred destination of US and French offshore campuses. While US institutions concentrate in China, many chose geographically proximate destinations such as Mexico and Canada for campus export. The high concentration of French campuses in Morocco (10), but also in Mauritius (5), can be explained by the long-standing links to former colonies. At the same time, French campuses have also been exported to European countries such as the UK (6).

Major exporting countries do not export campuses to the same destinations

In contrast to US, French and Russian campuses, most Australian and UK universities have exported to established importing countries in Southeast Asia and the Arab Gulf region. With 15 campuses, the United Arab Emirates (UAE) is the leading destination of UK campuses, followed by China, Malaysia and Singapore; and four Australian campuses are located in the UAE, in Malaysia and Singapore respectively. Geographical proximity can partially explain the strong presence of Australian campuses in Southeast Asia and the Indian Ocean region.

Overall, the major exporting countries do not only export to major importing

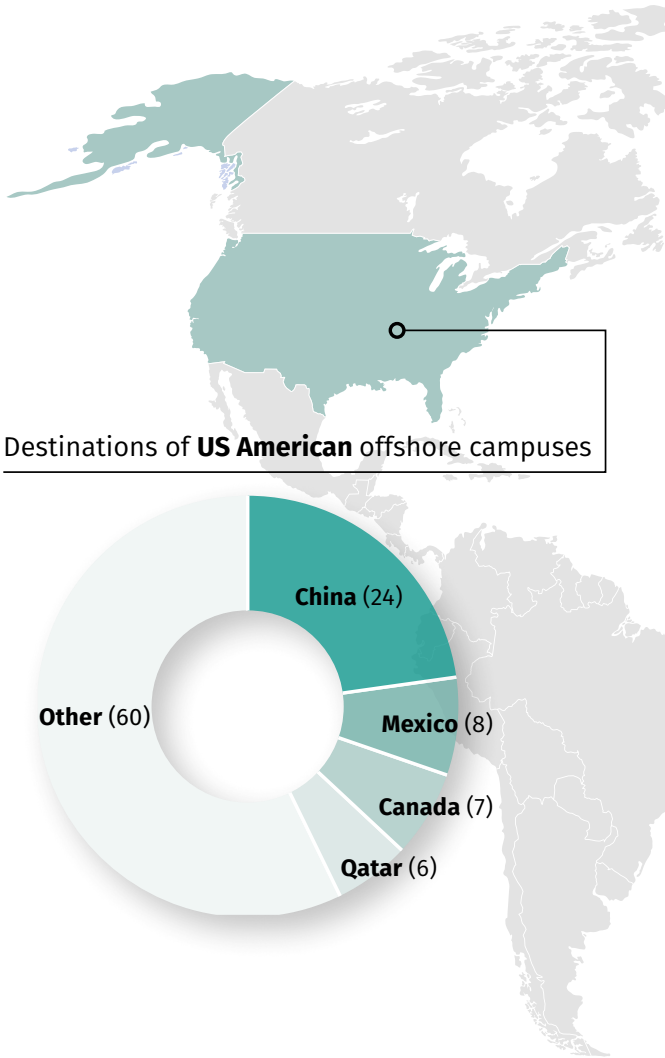
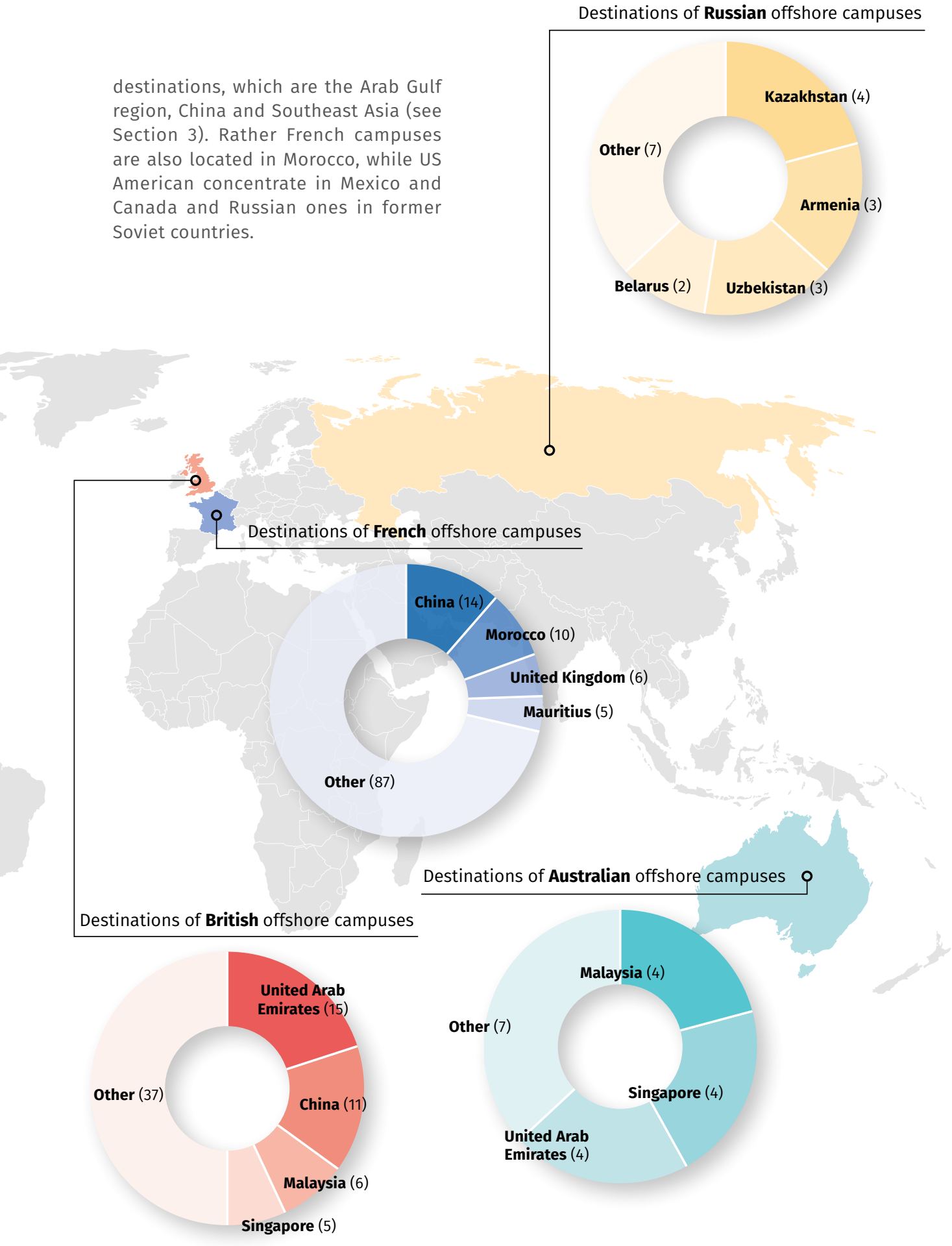


Figure 1.B: Destinations of offshore campuses from major exporting countries

destinations, which are the Arab Gulf region, China and Southeast Asia (see Section 3). Rather French campuses are also located in Morocco, while US American concentrate in Mexico and Canada and Russian ones in former Soviet countries.



1.C – Offshore campus import/export balance

Figure 1.C: Campus import/export balance of major exporting countries

Country	Campuses exported	Campuses imported
France	122	5
United States	105	9
United Kingdom	73	15
Australia	19	1
Russia	19	8
Switzerland	18	6
Netherlands	17	2
India	14	8
Kuwait	12	2
Malaysia	9	17

France, the United States and the United Kingdom export many more campuses than they import

An imbalance in campus import/export applies to all major campus exporters. All of them, except Malaysia, have exported much more campuses than they have imported. The imbalance is particularly blatant in France, the United States and the United Kingdom, which have exported between 15 and 25% of global offshore campuses but only have imported 1 to 3% of the total amount of offshore campuses worldwide. Malaysia is the only country with a negative import/export balance, which means that it has imported more campuses than it has exported. The difference in absolute numbers between export and import is greater for countries of the Global North such as Australia (difference of 19), the Netherlands (15) or Switzerland (12), and lower for a Global South country such as India (6).

2 – Historical development

2.A – Offshore campus development worldwide

Figure 2.A: Number of offshore campuses worldwide by year

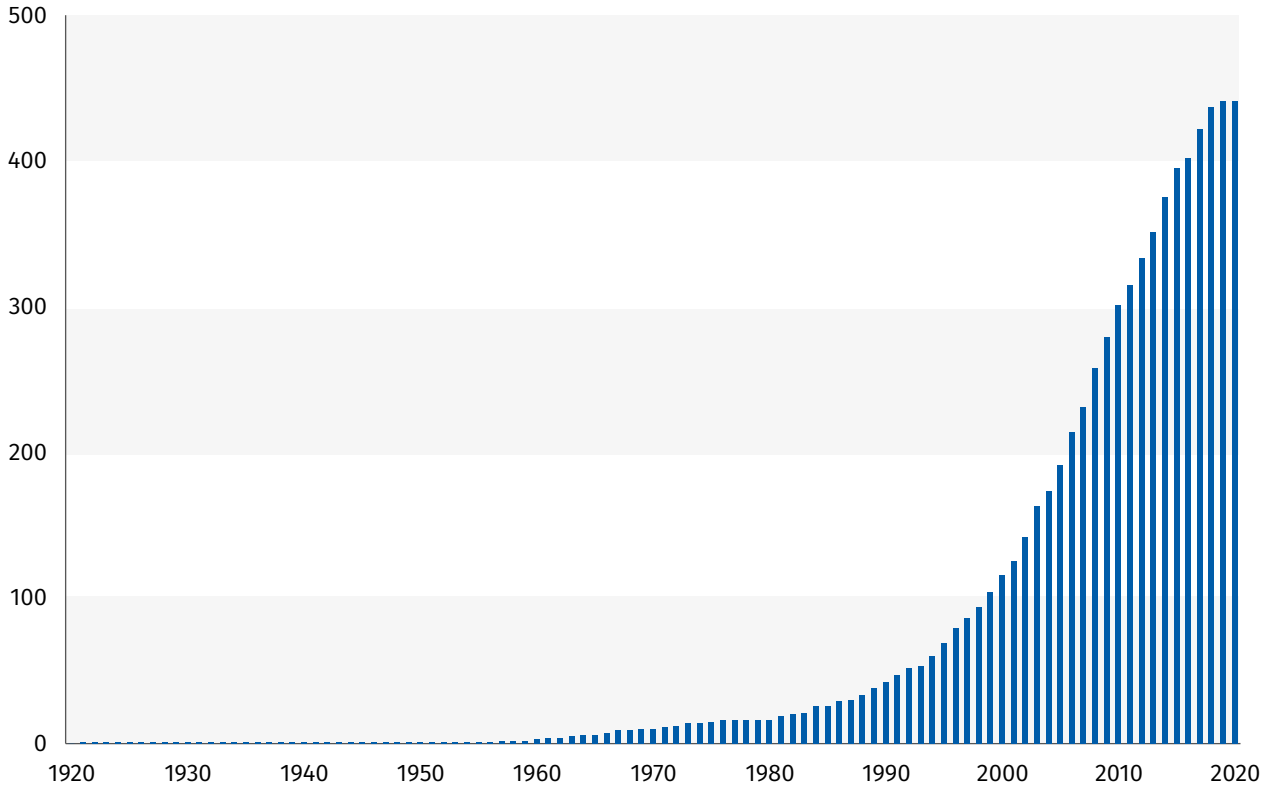
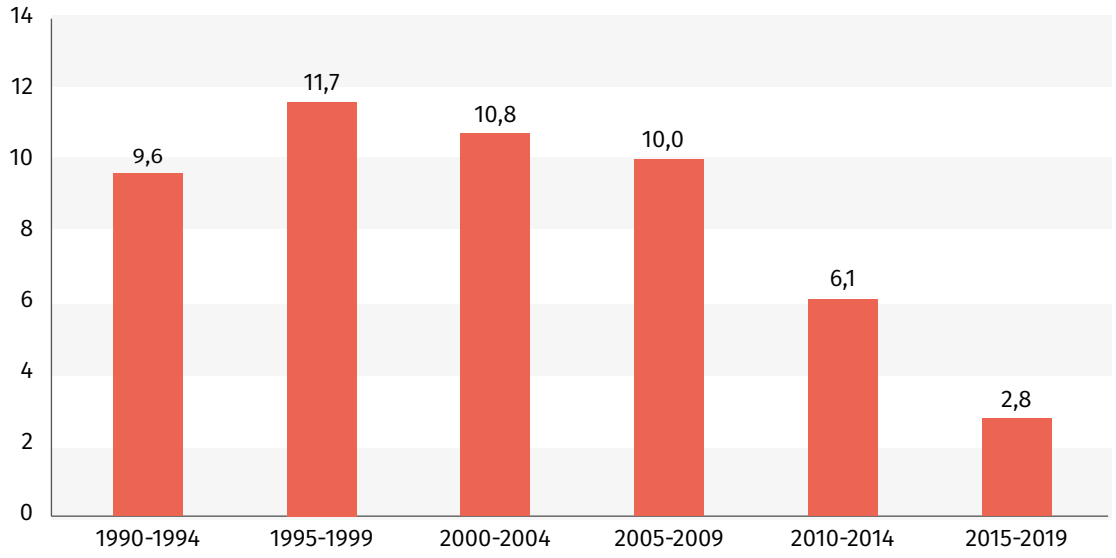


Figure 2.A shows the number of all offshore campuses we could identify worldwide over the last 100 years. In the figure we took only those campuses into account for which we could determine a definite year of opening. The figure points to an exponential growth of offshore campuses since 1989. The first campus to open was The New School Parsons Paris, an offshore campus from the United States (US) established in France in 1921. The following 70 years were characterised by a minimal increase offshore campuses. Two thirds of the campuses established before 1989 were branches of US universities (22 out of 33 campuses). Growth has accelerated since the end of the Cold War. Over the last 30 years, the number of offshore campuses worldwide has increased by more than 1,000%. The total number of offshore campuses was at 38 in 1989, surpassed 100 in 1999, exceeded 250 in 2009 and rose to more than 440 in 2019. As more than 90% of the campuses have been established after 1989, the following sections of this report focus on offshore campus development over the last 30 years.

The number of offshore campuses has increased remarkably since 1989

2.B – Growth rate of offshore campuses worldwide

Figure 2.B: Growth rate in % per 5-year intervals



Growth of offshore campuses continues, but slows down

Figure 2.B shows the growth rates of offshore campus development worldwide in 5-year intervals since 1990. The figure highlights relatively high growth rates of offshore campuses worldwide between 1990 and 2009. During this period, offshore campuses development grew on average over 10% per year, with an annual growth rate almost always above 7.5%. The growth rate peaked at around 15% in 1995 and then again in 2003. Over the last 10 years, the annual growth rate has averaged at around 5%. With the number of campuses growing continually, newly opened campuses add less weight to the total. Hence, the growth rate – around 2% in 2016 and 1% in 2019 – has decreased to lower values by now. However, growth rates still remain positive.

2.C – Offshore campus openings and closures over time

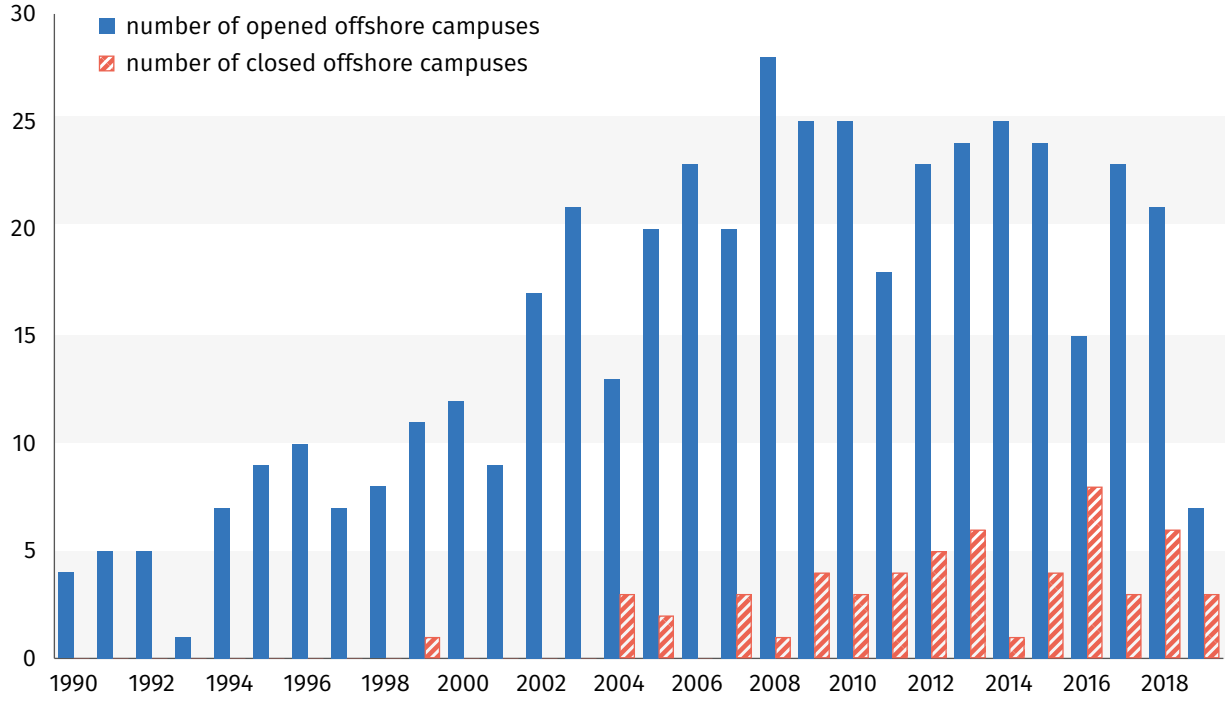
Figure 2.C shows offshore campuses' openings and closures worldwide by year over the last 30 years. Between 1990 and 2008, the number of newly opened campuses rose more or less linearly, with a few ups and downs. The number of newly opened campuses rose from four to 25 between 1990 and 2009, implying an increase of more than 500%. It reached an all-time high in 2008 when 28 new campuses were opened. Since 2008, the number of annual openings has settled at a high level with an annual average of more than 20 new campuses.

Qatar campus of US American Northwestern University. // Photo: Tim Rottleb

At the same time, over the last 15 years, offshore campus closures have occurred frequently. Almost every year, campuses were closed somewhere in the world. In 2013, 2016 and 2018, more than five campuses went out of operation in the respective years. Yet, the number of annual openings greatly exceeds the closures every year. On average, for every campus closed since 2004, eight new campuses have been opened.

Campus closures are marginal compared to openings

Figure 2.C: Number of opened and closed offshore campuses worldwide by year



Campus closures

Long-term prospects of offshore campuses remain unclear

The first campus closure listed in our database was the United States International University shutting down its campus in Nairobi in 1999. Examples for recent closures are the FAU Busan Campus, a German university's campus in South Korea, and University Paris Dauphine's campus in Casablanca in 2019. Further universities have announced to shut down single campuses over the next years.

Reasons for campus closures are diverse. A common reason is that offshore campuses can fail to attract students. While Aberystwyth University in Mauritius was built for 2,000 students, only 106 students had enrolled in the second year. This resulted in a deficit of over £1m in 2018 for the British university followed by campus closure in that year, after three years of operation.[5] Other universities' offshore development is tied to larger projects that might not develop as planned. This is, again, exemplified in Mauritius with the development of Uniciti Education Hub. So far, only one of the six announced universities, Middlesex University, appears to be located in this transnational education zone (see Section 5.E). Campuses also close down when failing to meet the requirements of local regulation. ESMOD Berlin closed in 2017 after 23 years of operation, amongst other reasons failing at receiving the necessary accreditation.[6]

Offshore campuses are a risky business. Universities face the risk of financial losses when failing to attract students, investing in development projects with unclear outcomes, or facing difficulties with local regulatory systems. Universities' decisions to invest or to pull out of a certain part of the world thus not lie solely with the university itself, but are also shaped by constraints of the local context.

5 BBC News (published 5 February 2018). Aberystwyth University's Mauritius campus loses £1m.

6 Thönnissen, G. Der Tagesspiegel (published 7 October 2017). Mode: Die Esmod schließt für immer. Das Ende einer Ära.

3 – Importing countries

3.A – Major importing countries

Figure 3.A: Number of offshore campuses in major importing countries

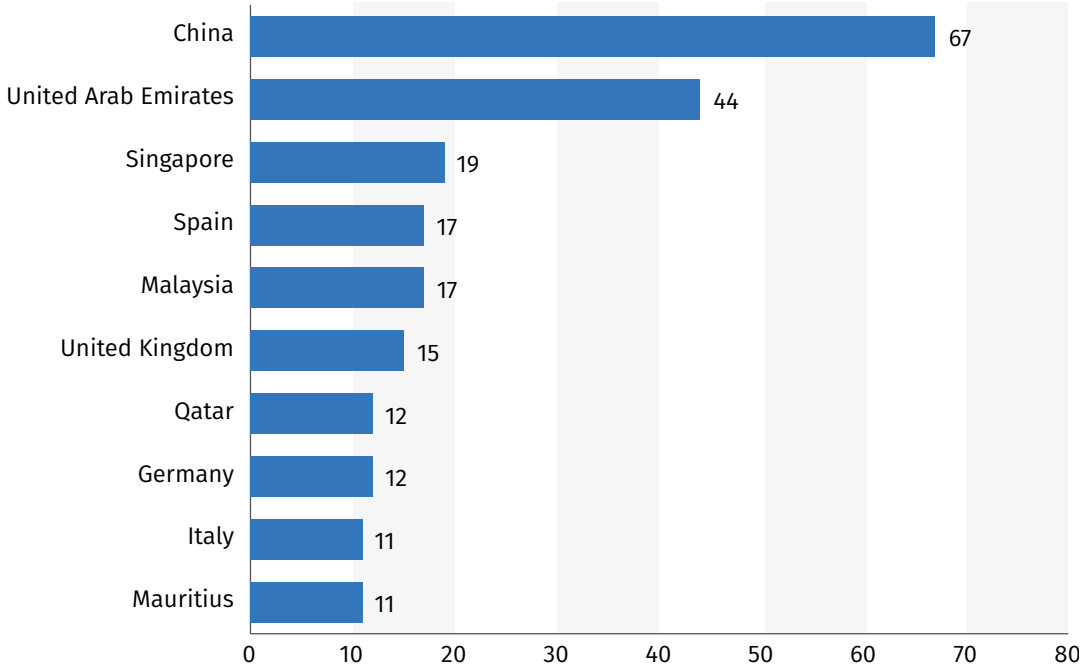


Figure 3.A shows the major destinations of offshore campuses worldwide. It reveals that today around one quarter of all offshore campuses are located in just two countries: China and the United Arab Emirates (UAE). By 2019, China has imported the most campuses worldwide (67). The only other country that came close to this number was the UAE with 44 offshore campuses. All other countries have imported less than 20 campuses each.

Although location choices vary for the respective universities, regional centres of offshore campuses become visible: East and Southeast Asia, the Arab Gulf region and Europe. While debates on transnational higher education usually perceive Europe as a region from which campuses are exported rather than imported, the data points to four European countries as major campus destinations: Spain, the United Kingdom (UK), Germany and Italy. The UK is commonly known as a country that develops higher education across its national borders, rather than importing campuses of foreign institutions. Spain is hardly mentioned in the context of offshore campus development, but belongs to the five main importers worldwide. The findings show that European countries import offshore campuses as well and challenge the perception that the phenomenon is only happening in the global South.

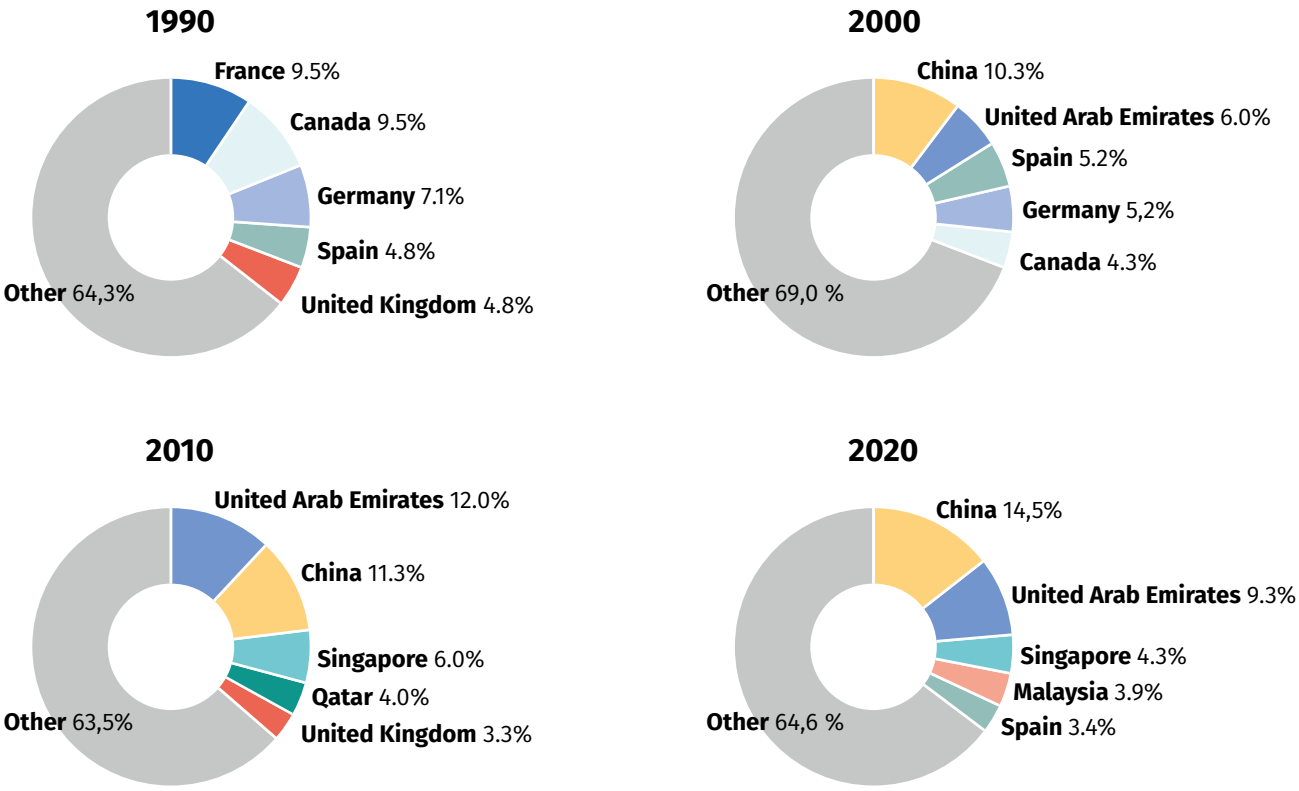
Offshore campuses are not exclusively exported from the Global North to the South

Some of the major importing countries have pursued an active policy of importing foreign universities (see box in Section 3.C) and are regularly mentioned in debates concerning so-called international education hubs (see Section 5.E). Mauritius is the only country among the major campus importers that is not located in one of the three geographical concentrations in East and Southeast Asia, the Arab Gulf region or Europe (see Section 3.D). This indicates that new centres for campus development can appear, yet it remains to be seen whether the African continent will be the next hotspot for offshore campus development as some actors in the sector believe it will.

3.B – Global share of major importing countries over time

Figure 3.B shows the five countries that had imported the most campuses in 1990, 2000, 2010 and 2020 respectively. Over the last 30 years, the five major importing countries have always accounted for around 35% of all campuses worldwide. In 1990, the main importing countries were Western European or North American: France, Canada, Germany, Spain and the United Kingdom. The most attractive destinations have shifted over time from European countries to countries in the West Asia and North Africa region as well as East and Southeast Asia. The shift started during the 1990s when China and the United Arab Emirates became the two main destinations of offshore campuses worldwide, with China's share of the total number growing continuously. With its 67 imported campuses, China has become the main campus importing

Figure 3.B: Share of major importing countries in 1990, 2000, 2010 and 2020



country today. Since the 2000s, more than 50% of all campuses worldwide are located in a few countries in the West Asia and North Africa region or in East and Southeast Asia.

3.C – Development of offshore campuses in major importing countries

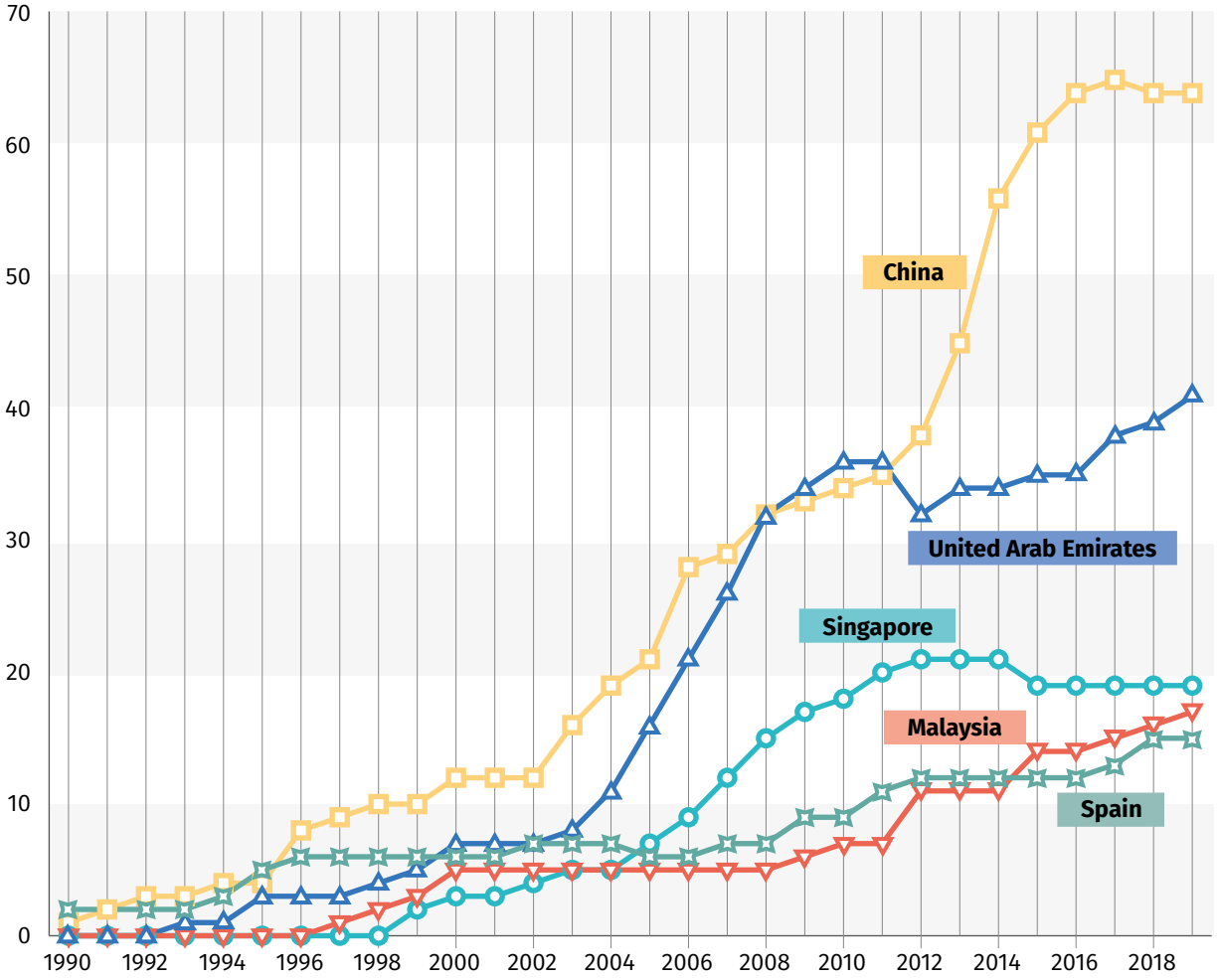
Campus development in major importing countries grew rapidly, then stabilized

Figure 3.C illustrates how the absolute number of campuses in the most actively importing countries has developed over the last 30 years. Except three minor ditches in the United Arab Emirates (UAE) in 2012, in Singapore in 2015 and in China in 2018, the number of campuses in the five major importing countries has grown continuously. However, these drops in numbers in China, the UAE and Singapore after 2010 hint at a slowed growth after a certain threshold had been exceeded.

China has imported by far the most campuses since 1990, with only few campuses more than in other countries between 1995 and 2010 but with large differences after 2010.

The importing countries opened up for offshore campus development at different points of time. The first campuses established in Spain were opened relatively early. In 1990, Spain had already imported

Figure 3.C: Number of offshore campuses in major importing countries by year



two campuses and this number grew slowly but steadily for the next 15 years. Malaysia shows similar characteristics but time-delayed: early establishment of the first campuses in 1997 and slow, steady growth afterwards. For China, the UAE and Singapore, the development is different. After the establishment of the first offshore campuses in these countries, the number grew rapidly over the next 15 years and then settled at a high level. In China and the UAE, the numbers of campuses increased very rapidly for around 15 years after the establishment of the first campuses in the mid-1990s. While this number more or less stopped increasing in the UAE after 2009, it continuously rose in China. In Singapore, a similar pattern as in the UAE can be observed but starting some years later. The first offshore campus in Singapore was opened in 1999 and was followed by around 20 others over the next 13 years. After 2012, no new campuses have been opened in Singapore.

Offshore campus development is often linked with governments' strategies to attract foreign universities (see box in this section), which is reflected in the numbers for China, the UAE and Singapore in particular.

Governments' strategies to attract offshore campuses // Singapore

With the United Arab Emirates, Singapore, Malaysia and Qatar, four countries with a relatively small population are among the most active campus importers worldwide. Their attractiveness for offshore campus development is largely based on governments' strategies to explicitly target and attract foreign universities. These active policies of campus development often include providing physical and legal infrastructure for foreign universities.

Singapore's Economic Development Board explicitly targeted foreign universities with material and other incentives

Governments' exact reasons and rationales may differ from case to case and over time. Yet, the strategies are connected to satisfying local demand for higher education, upgrading a workforce for the transition to the knowledge-based economy and/or identifying education as a revenue-creating economic sector.

In particular, Singapore's World Class University Programme from 1998 and Global Schoolhouse Programme from 2002 have substantially contributed to the establishment of numerous offshore campuses in the city-state over the following 10 to 15 years. For establishing and running branches in Singapore, foreign higher education institutions have received double-digit millions of US dollars as direct and indirect subsidy from the Economic Development Board as well as further incentives such as discounts on land and rents or easier access to work permits and housing for their staff.[7]

7 Olds, K. (2007). Global Assemblage. Singapore, Foreign Universities, and the Construction of a "Global Education Hub". In: World Development 35(6), 959-975.

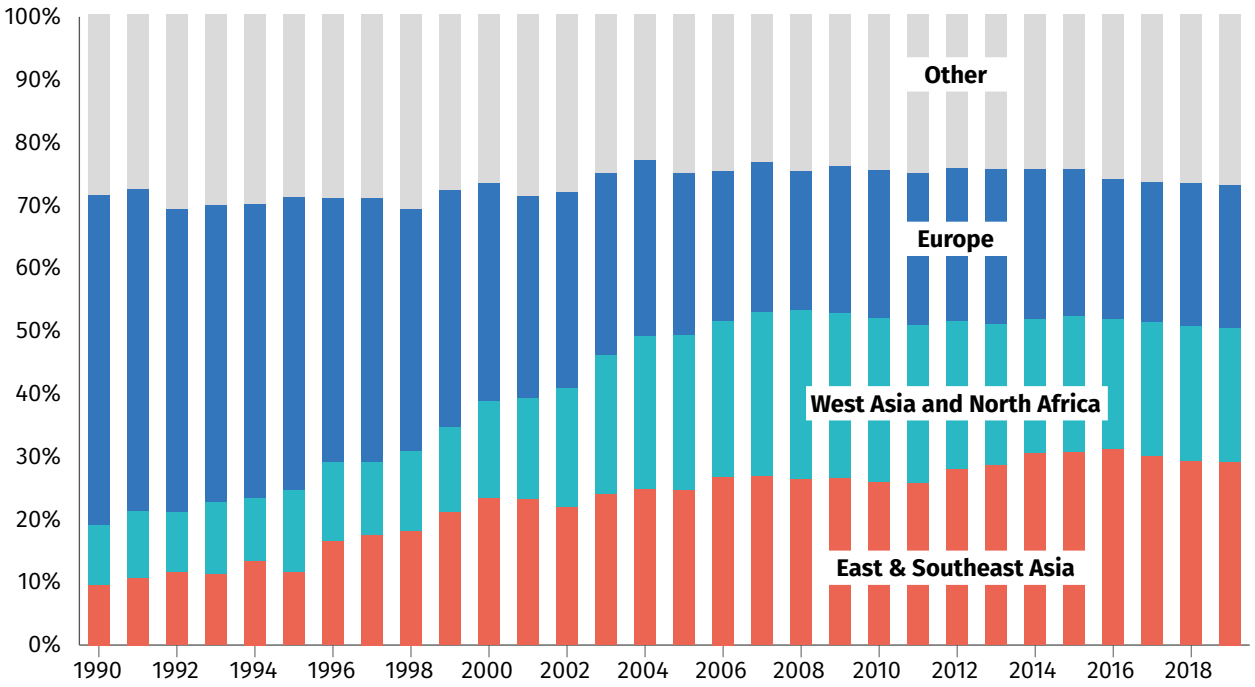
View on Singapore's skyscrapers. // Photo: Jana Kleibert

3.D – Regional centres of offshore campus development

Figure 3.D shows how the distribution of offshore campuses among major importing regions has developed since 1990. The share of campuses located in Europe, the West Asia and North Africa (WANA) region or East and Southeast Asia – the three major importing regions – has constantly been above 70%. While in the early 1990s one in two campuses worldwide was located in Europe, this share has decreased to less than one in four in the mid-2000s. Contrarily, in 1990, WANA or East and Southeast Asia were each importing fewer than 10% of all campuses worldwide. Yet, in both regions campus numbers have grown substantially since. While WANA's share reached its maximum of more than one quarter in 2008 and stands at around one fifth today, East and Southeast Asia has been the destination of around 30% of all campuses since 2014. This development indicates that over the last 30 years new centres of offshore campus development have been emerging in the WANA region and in East and Southeast Asia.

New centres of offshore campus development have emerged in the West Asia and North Africa region and in East and Southeast Asia

Figure 3.D: Distribution of offshore campuses in major importing regions by year



The Arab Gulf region as an offshore campus hotspot

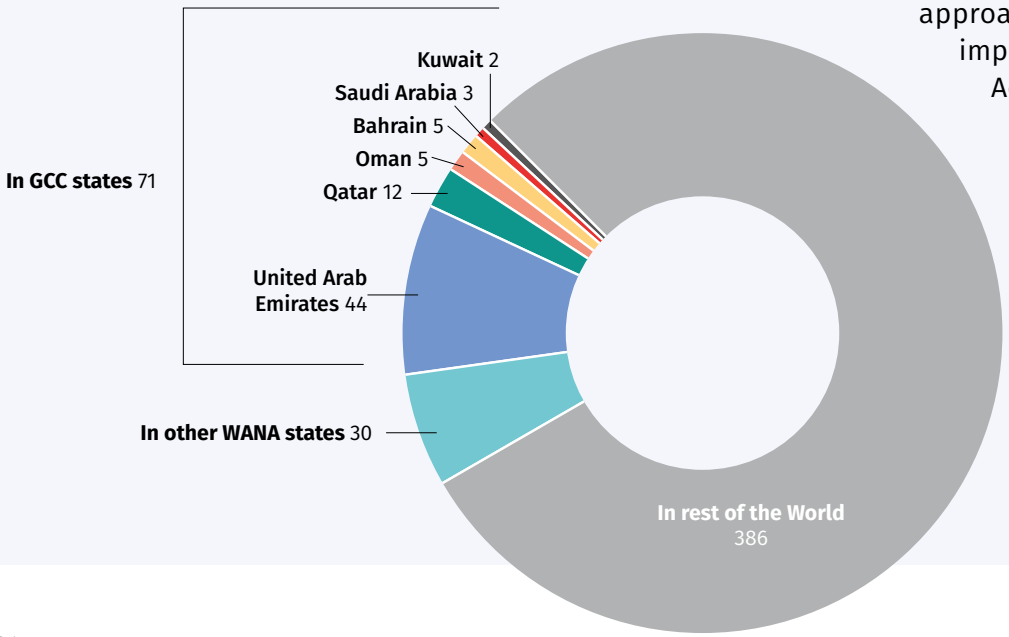
The West Asia and North Africa region (WANA) is one of the major destinations for offshore campus development worldwide. Within the wider region, a rather uneven distribution can be observed: about 70% (71) of the WANA region's campuses (101) are located in one of the member states of the Gulf Cooperation Council (GCC). This concentration reflects these countries' strategies of the past years to diversify their largely resource based extractive economies, as well as their ambitions to generate political and cultural soft power. Further, this concentration points out the increasing dominance of the GCC states in the wider region.

The Arab Gulf region as a main destination for offshore campus development reflects its growing political and economic influence

Although all GCC states have imported campuses, most of the offshore campuses are located in just two countries: the United Arab Emirates (UAE) and Qatar. Arguably in competition with each other, both countries have used their significant oil and gas funds to invest in attracting foreign universities since the early 2000s. Both created physical infrastructure (for example Education City in Qatar or Dubai International Academic City) and regulatory frameworks to integrate larger numbers of foreign universities into their higher education systems. They have managed to attract some well-established universities like Sorbonne (Abu Dhabi) or Georgetown University (Qatar).

However, there are noticeable differences in the two countries' approaches. Qatar has attracted fewer (12) but more prestigious foreign universities, and directly covers the expenses for most of them. In the UAE, Abu Dhabi has followed a similar funding model, but with fewer offshore campuses (5). In contrast, the Emirate of Dubai, which is equipped with much smaller oil and gas wealth in comparison, has imported 29 campuses. Dubai follows a largely market-based approach where the financial risks usually lie with the universities and/or their business partners. Finally, the Emirate of Ras al-Khaimah is emulating Dubai's approach with nine campuses imported so far. With RAKEZ Academic Zone (see Section 5.E) the Emirate is also in the process of establishing a similar infrastructure and it appears to have ambitions to develop a new offshore campus hotspot at the sub-country level.

Number of offshore campuses in the Arab Gulf region



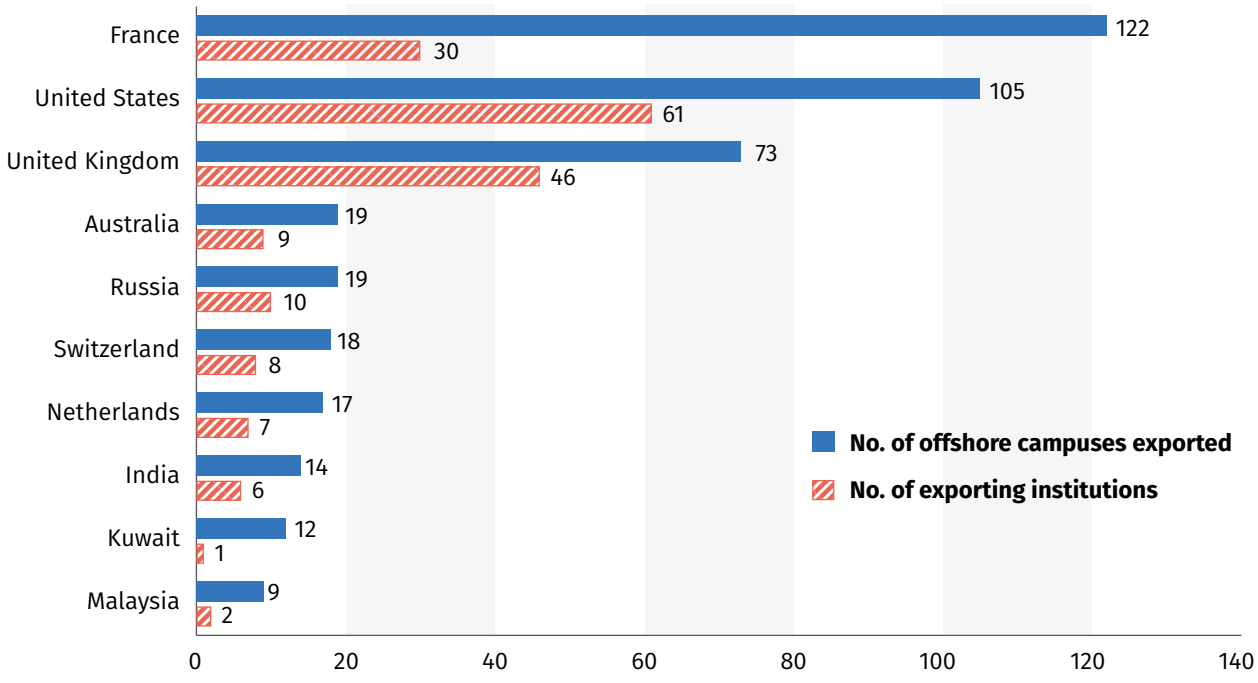
4 – Exporting countries

4.A – Countries and institutions exporting offshore campuses

Figure 4.A shows the difference between the number of offshore campuses exported and the number of higher education institutions involved in campus development across countries. Both numbers underline the importance of France, the United States and the United Kingdom as drivers behind the transnationalisation of higher education. In three countries, a relatively small number of higher education institutions exports particularly large numbers of campuses: France, Kuwait and Malaysia. This explains why France is the main exporter of offshore campuses, but also why Kuwait and Malaysia appear to be major campus exporters. Some French institutions, for example, have created large global networks of more than 10 campuses (such as ESMOD with 15 and Vatel with 34 campuses worldwide). Kuwait is headquarter to the Arab Open University, a network of 12 campuses throughout the Arab region. Also, Malaysia's Limkokwing University of Creative Technology has been very active in establishing an international network with nine campuses. Universities in the other seven countries rarely develop more than three campuses, yet some exceptions should be noted such as the City University of Seattle with 15 campuses, Webster University with nine campuses or the Swiss International Business School with eight campuses.

France exports the most offshore campuses

Figure 4.A: Number of offshore campuses exported versus number of exporting institutions by country



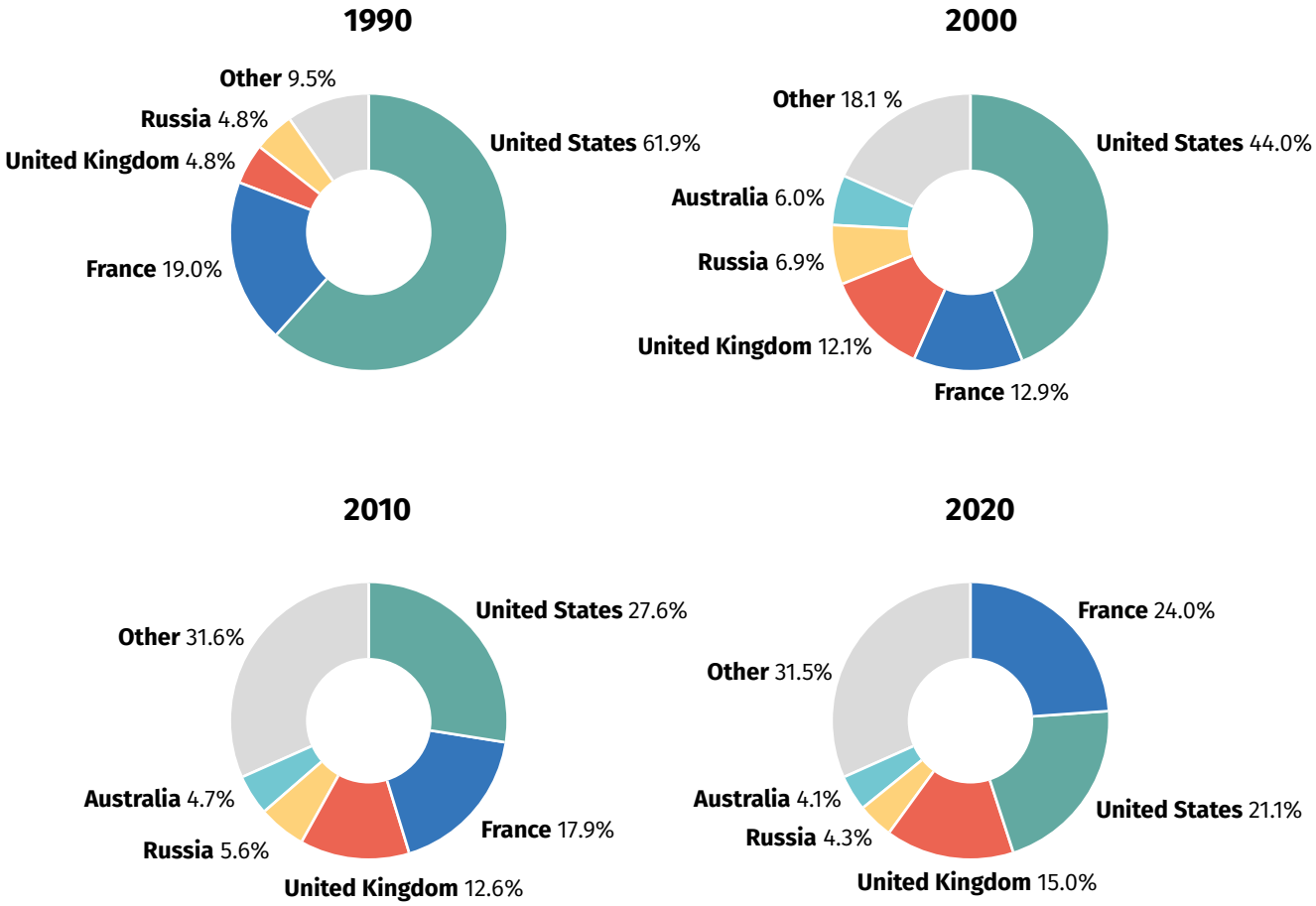
4.B – Global share of major exporting countries over time

Over time, a broader variety of countries exported campuses

Figure 4.B shows the countries from where most offshore campuses had originated in the years 1990, 2000, 2010 and 2020 respectively. As there were only 42 offshore campuses worldwide in 1990, further countries with very few offshore campuses appeared among the major exporters. Yet, their share has become marginal over the following years. Today, around one quarter of all offshore campuses worldwide are exported by French higher education institutions, followed by around one fifth from American universities (Figure 4.B). Taken together offshore campuses from the United Kingdom (UK), France and the United States (US) account for more than 60% of all campuses worldwide.

The distribution of the major exporting countries has developed differently over the last 30 years. While the US was by far the largest exporter in 1990, its global share decreased from more than 60% in 1990 to less than 45% in 2000, to less than one quarter in 2019. France, the second main exporter since 1990, overtook the

Figure 4.B: Share of major exporting countries in 1990, 2000, 2010 and 2020



US in 2018. The UK's share continuously increased as well, from around 5% in 1990 to 15% in 2020. Russian universities' global presence slightly increased during the 1990s, from around 5% in 1990 to around 7% in 2000, but then decreased again to around 4% in 2020. While having no campuses abroad in 1990 at all, Australian universities started to export them in the 1990s. Their numbers have grown continuously and since 2000, Australian offshore campuses account for 4 to 6% of the global number.

Overall, from 1990 to 2010, universities from outside of the major exporting countries increasingly engaged in campus offshoring as well. While 90% of the total offshore campuses in 1990 came from the major exporting countries, this shrunk to around 80% in 2000 to less than 70% in 2010 and has remained stable since then.

4.C – Development of offshore campuses by major exporting countries

"Born global" campus structures

Offshore campuses reflect a diversity of internationalisation strategies and do not necessarily follow a branch model. When institutions are integrated within a multiple campuses structure, it is sometimes difficult to differentiate the parent from the offshore campus. The business schools ESCP and INSEAD are examples thereof. Even though ESCP was originally created in Paris, its network of multiple campuses across Europe makes it hard to clearly identify a city of origin from which campuses would be exported: during their studies, students travel to the different campuses located in Berlin, London, Madrid, Torino and Paris. Branded as the "Business School for the World" and with campuses in the United Arab Emirates, in Singapore and in France, INSEAD does not identify with one single national origin. INSEAD's dean emeritus[8] himself classifies ESCP and INSEAD as multinational and transnational institutions as opposed to the traditional branch campuses. While a branch campus delivers the institution's programmes in a destination country and is fully controlled by the parent institution, multinational and transnational institutions consist of a federation of campuses that reach beyond national boundaries. They are trying to shed any strong national identity as if they were "born global".

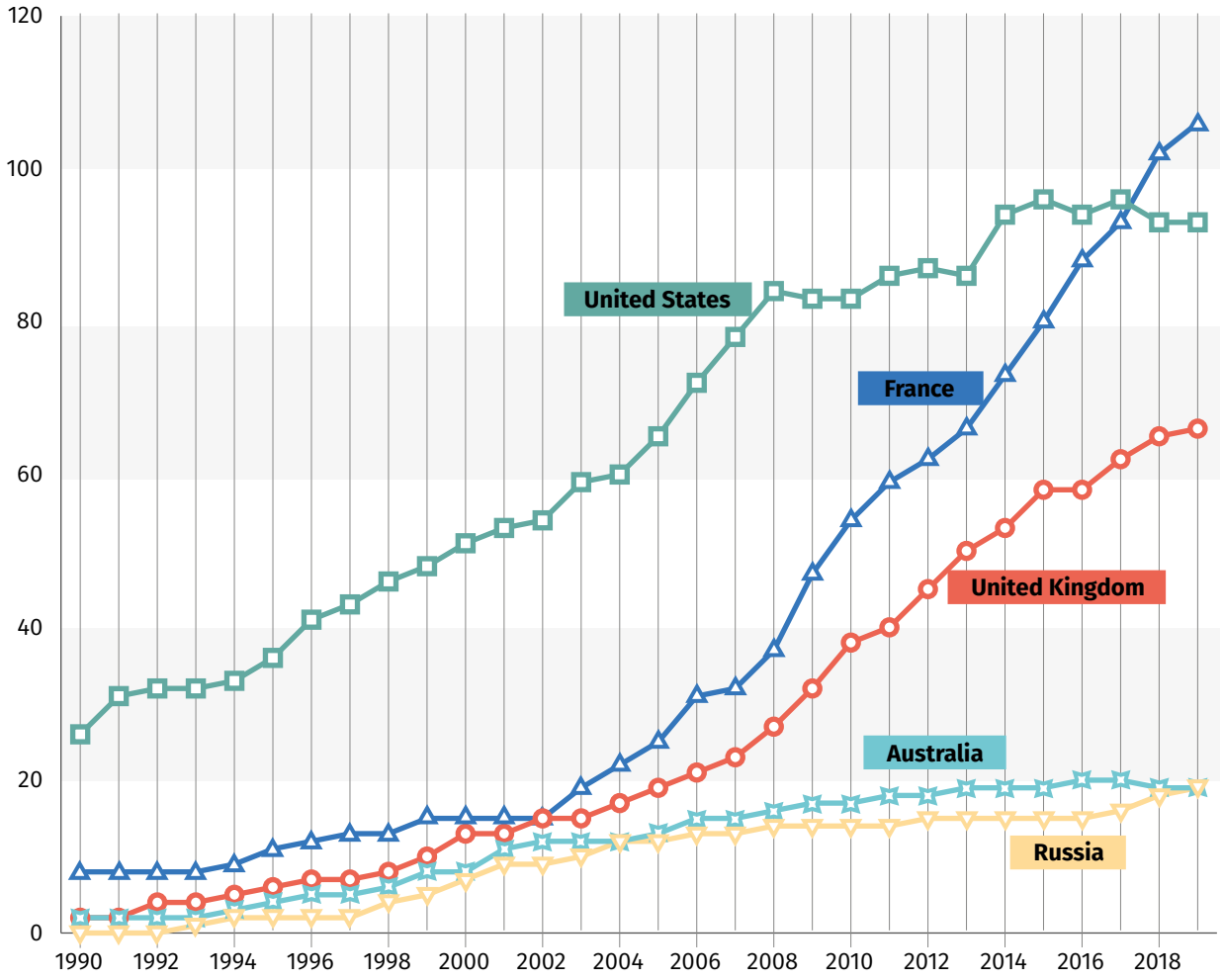
Offshore campuses do not necessarily follow a branch model

8 Hawawini, G. (2016). The Internationalization of Higher Education and Business Schools. A Critical Review. Singapore: Springer.

Campus exports from France, the United States and the United Kingdom have grown rapidly

Figure 4.C shows the export of campuses over time from today's major exporting countries. The boom in campus exports started in the 1990s in the United States (US), followed in the 2000s by France and the United Kingdom (UK). The number of campuses exported from the US, constantly on the rise since 1990, started to stagnate in 2008. While 25 US campuses opened between 1990 and 2000 and 33 between 2000 and 2008, it was only nine new campuses between 2008 and 2019. In France and the UK, the total number of exported campuses more than doubled between 2005 and 2010, with a total of 54 offshore campuses from France (+ 29 campuses in five years) and 38 from the UK in 2010 (+ 19 campuses in five years). Campus export has been continuously on the rise in both countries, yet stronger in France. In 2018, the number of campuses exported from France surpassed the number of campuses exported from the US. As for Australia and Russia, the fourth and fifth main campus exporters worldwide, campuses were exported at a slower pace, without such a strong rise as observed in France, the US and the UK.

Figure 4.C: Number of exported campuses per country of origin by year

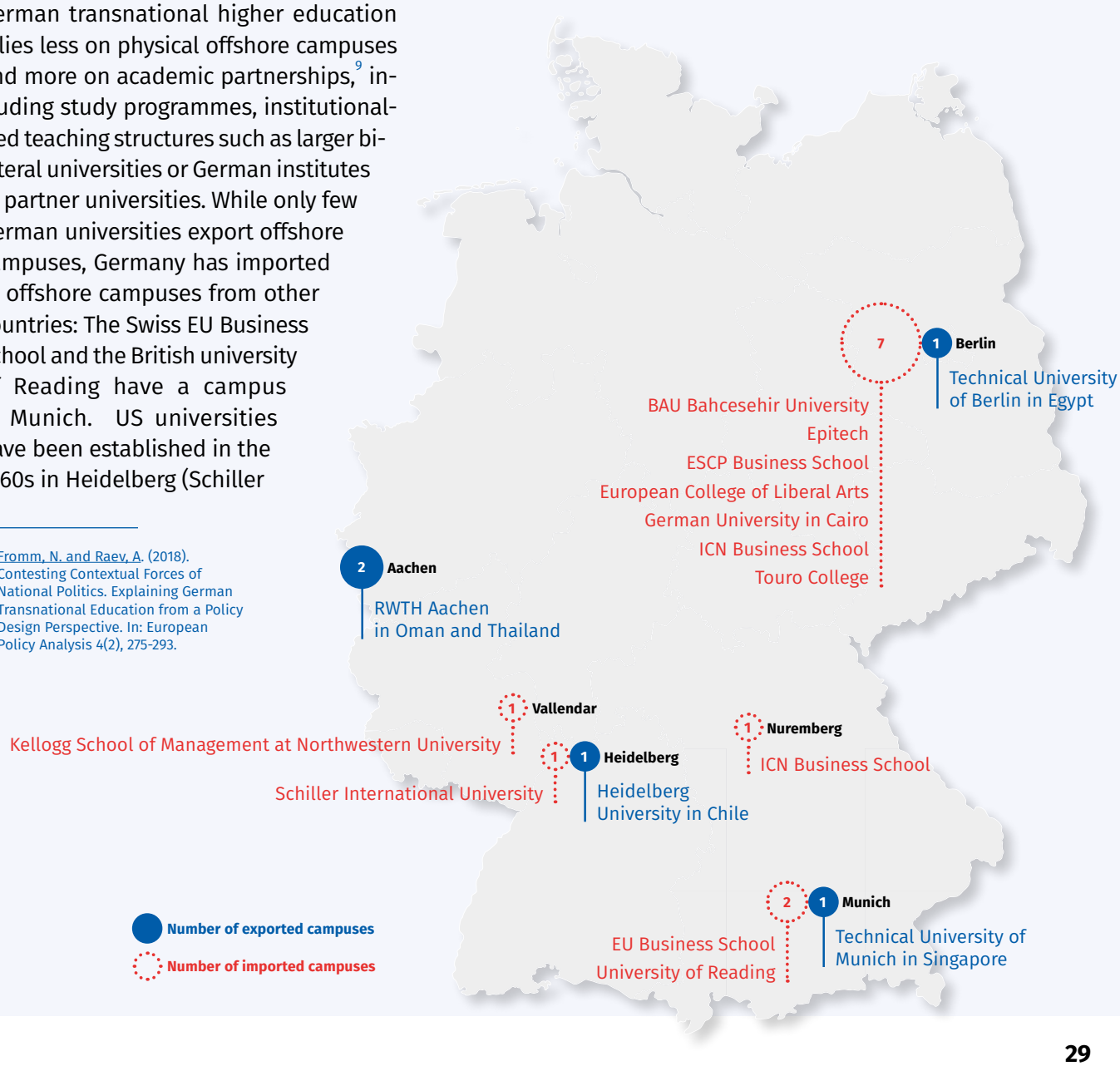


Offshore campuses from and in Germany

Only five offshore campuses have been exported from Germany: the Aachen-based university RWTH with a campus in Oman and a presence in Thailand (The Sirindhorn International TGGS), the Technical University of Munich with a campus in Singapore (TUM Asia), Heidelberg University with a site in Chile (Heidelberg Center Latin America) and the Technical University of Berlin's campus in the Egyptian town of El Gouna (TUB Campus El Gouna). Another German offshore campus established in South Korea by the Friedrich-Alexander University Erlangen-Nuremberg closed in 2019.

German transnational higher education relies less on physical offshore campuses and more on academic partnerships,[9] including study programmes, institutionalised teaching structures such as larger bilateral universities or German institutes at partner universities. While only few German universities export offshore campuses, Germany has imported 12 offshore campuses from other countries: The Swiss EU Business School and the British university of Reading have a campus in Munich. US universities have been established in the 1960s in Heidelberg (Schiller International University) and in the late 1990s in Vallendar through a partnership between Northwestern University and the WHU. Nuremberg was chosen as the destination of the French ICN Business School's campus. While only one Berlin-based university has exported a campus abroad, Berlin has imported seven of the 12 offshore campuses in Germany: the Bard and Touro Colleges from the US, BAU University of Applied Sciences from Turkey, ESCP Europe, ICN Berlin and Epitech from France as well as the Germany University in Cairo from Egypt.

Germany is not a main exporting country of offshore campuses



9 Fromm, N. and Raev, A. (2018). Contesting Contextual Forces of National Politics. Explaining German Transnational Education from a Policy Design Perspective. In: European Policy Analysis 4(2), 275-293.

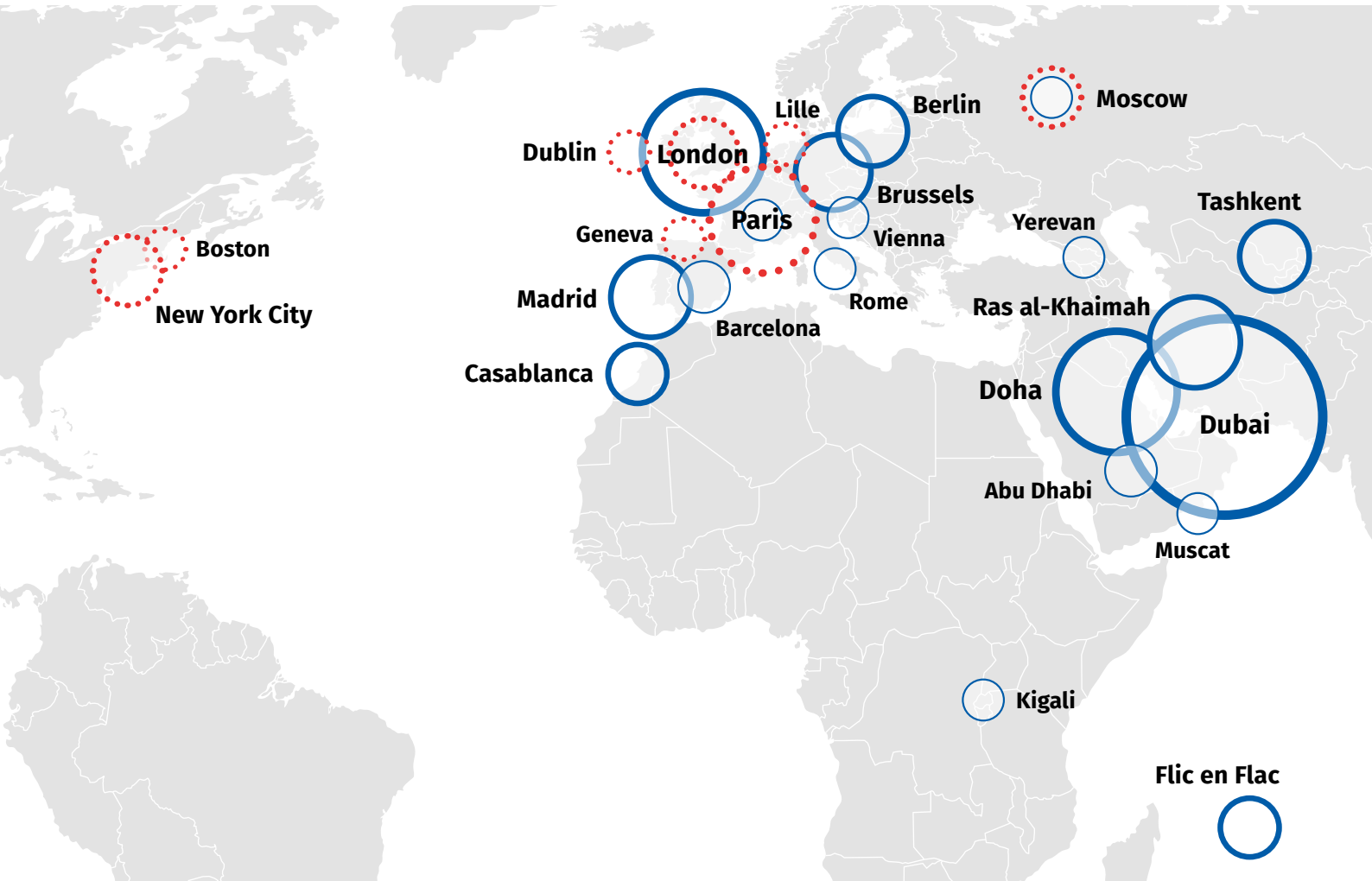
5 – Exporting and importing cities

5.A – World map of importing and exporting cities

Figure 5.A shows the cities that have imported the most campuses worldwide (solid-lined circles) as well as those from which the most higher education institutions have exported campuses (dotted-lined circles). Only those cities are shown with a minimum of four imported campuses or four exporting universities. The larger the diameter of the circles the more offshore campuses are located in or, respectively, the more exporting institutions come from this city.

Paris, London, Moscow, New York City, Boston, Dublin, Glasgow, Lille and Geneva (dotted-lined circles) are the nine cities worlwide with at least four higher education institutions exporting campuses. All these cities are located in

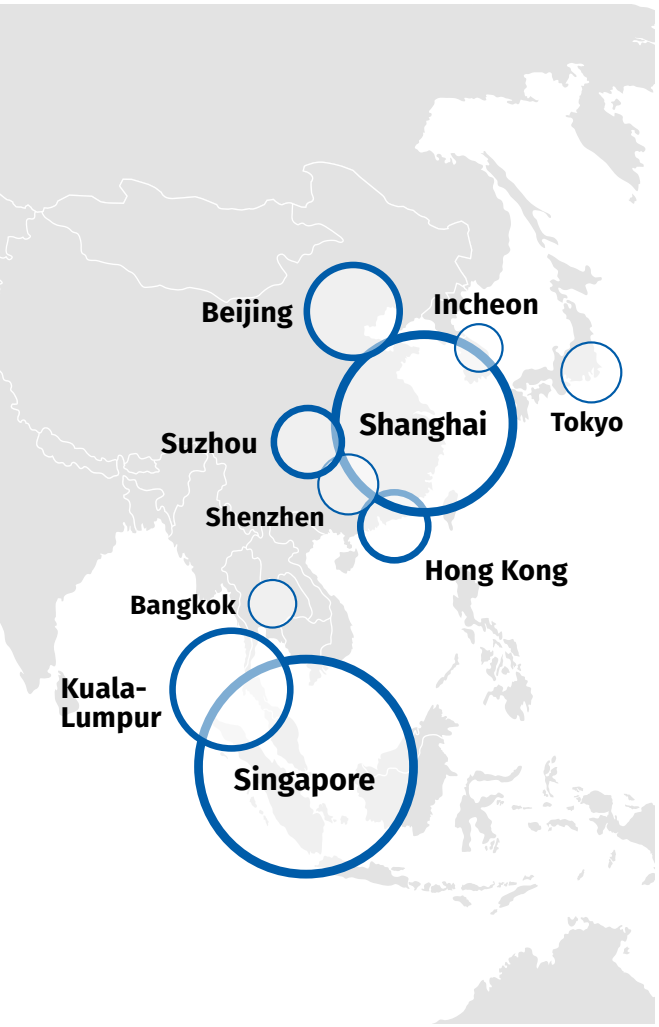
Figure 5.A: World map of major importing and exporting cities

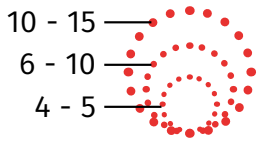


the Global North and, with the exception of Moscow, in the Western hemisphere. Cities importing offshore campuses (solid-lined circles) are geographically clustered. No city that imports more than four campuses can be found on the American continents, only three cities are in Africa, nine are in Europe and 17 are in Asia. Around 60% of the Asian cities on the map are in Southeast or East Asia. Almost half of all importing cities on the map are located in just three regional clusters, the Arab Gulf region, Southeast Asia or China. Some rather peripheral cities appear on the map, for example Flic en Flac in Mauritius or Ras al-Khaimah in the United Arab Emirates (see Section 5.E). Similarly, there are Tashkent, where a substantial portion of the campuses are of Russian origin, and Casablanca, which imports exclusively French campuses.

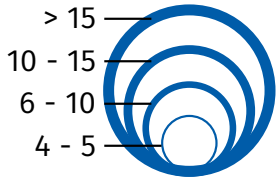
Few selected cities are the major campus importers

Many European cities emerge as major campus importers and three of them – London, Paris and Moscow – function as both origins of universities exporting campuses and as destinations for offshore campus development. Particularly in London and Paris campus import and export coincides with the cities' status as European "Global Cities". This highlights that these two cities, which are traditional political, financial and cultural centres, do not only attract investments but also function as the key sites of commanding and controlling investments abroad.





Number of higher education institutions with offshore campuses



Number of hosted offshore campuses

5.B – Major importing and exporting cities

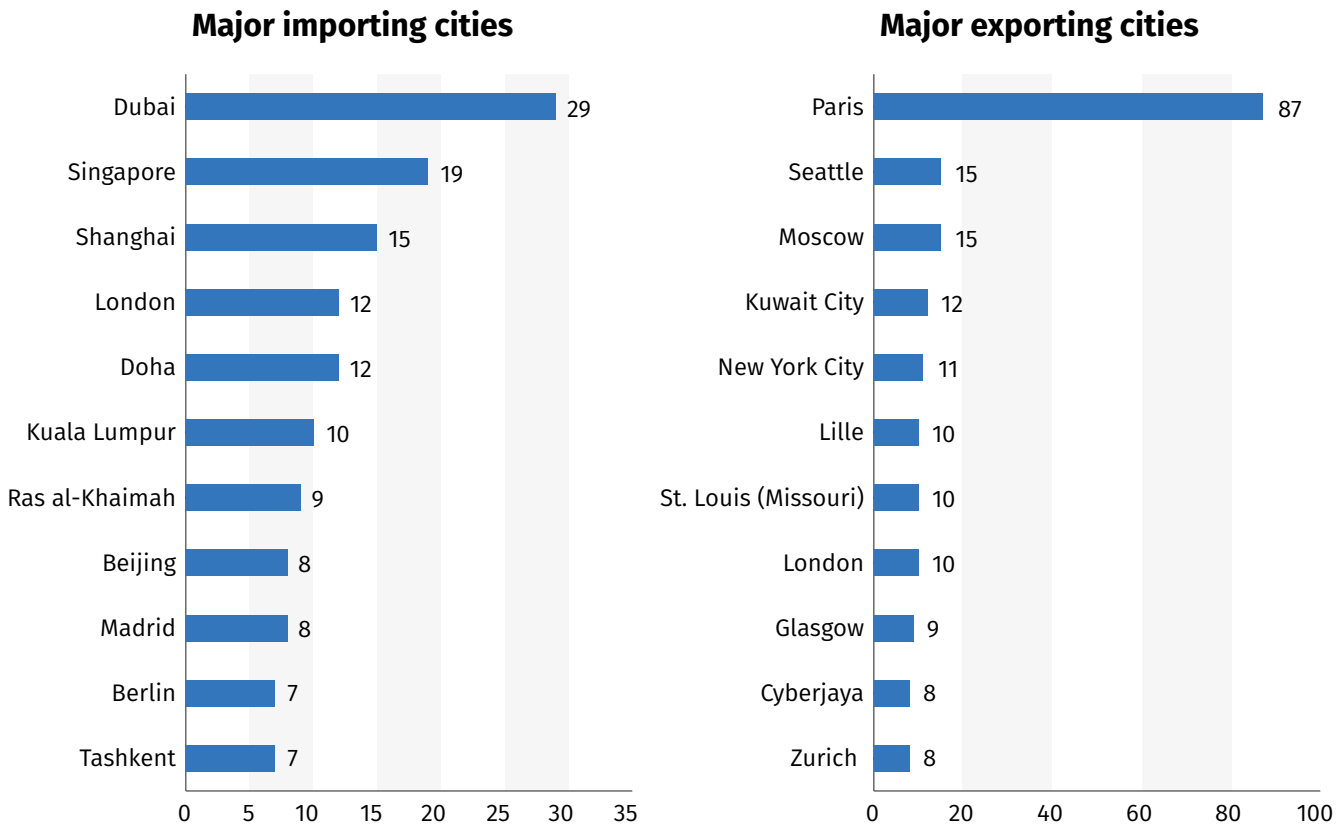
In some countries, offhore campuses concentrate in few cities

Figure 5.B illustrates the major urban destinations and origins of offshore campuses in 2019. Offshore campus development is usually discussed on the national level. However, the figure reveals a strong concentration of the phenomenon in few selected cities – both in terms of campuses imported and exported. These urban distributions help explain the role of some countries in global patterns of offshore campus development.

On the country level, for example, China was clearly the main importer of campuses in 2019 (see Section 3.C). However, Shanghai, However, Shanghai, the country's main importing city, is not the largest importing city of campuses in global comparison. Contrarily, with 29 campuses, Dubai is the main importing city of offshore campuses worldwide, even though in total the United Arab Emirates (UAE) have imported by far fewer campuses than China. This can be explained by the centralised nature of some states, where single cities such as Dubai play key roles, or if they are in fact small or city states, such as Qatar or Singapore.

Several cities on the list can be described as "Global" or "World Cities". Cities like London, Dubai, Singapore or Shanghai are regarded not only as regional, but also as global nodes in networks of people, capital and ideas. Figure 5.B shows that these cities are also favoured locations for offshore campuses. However, more peripheral cities like Ras al-Khaimah, capital of one of the UAE's emirates of the same name, and Tashkent, capital of Uzbekistan, are among the major destinations as well. While Ras al-Khaimah has imported campuses mainly from South Asia and Europe, the former Soviet city Tashkent is a destination to several Russian offshore campuses.

Figure 5.B: Offshore campus importing and exporting cities



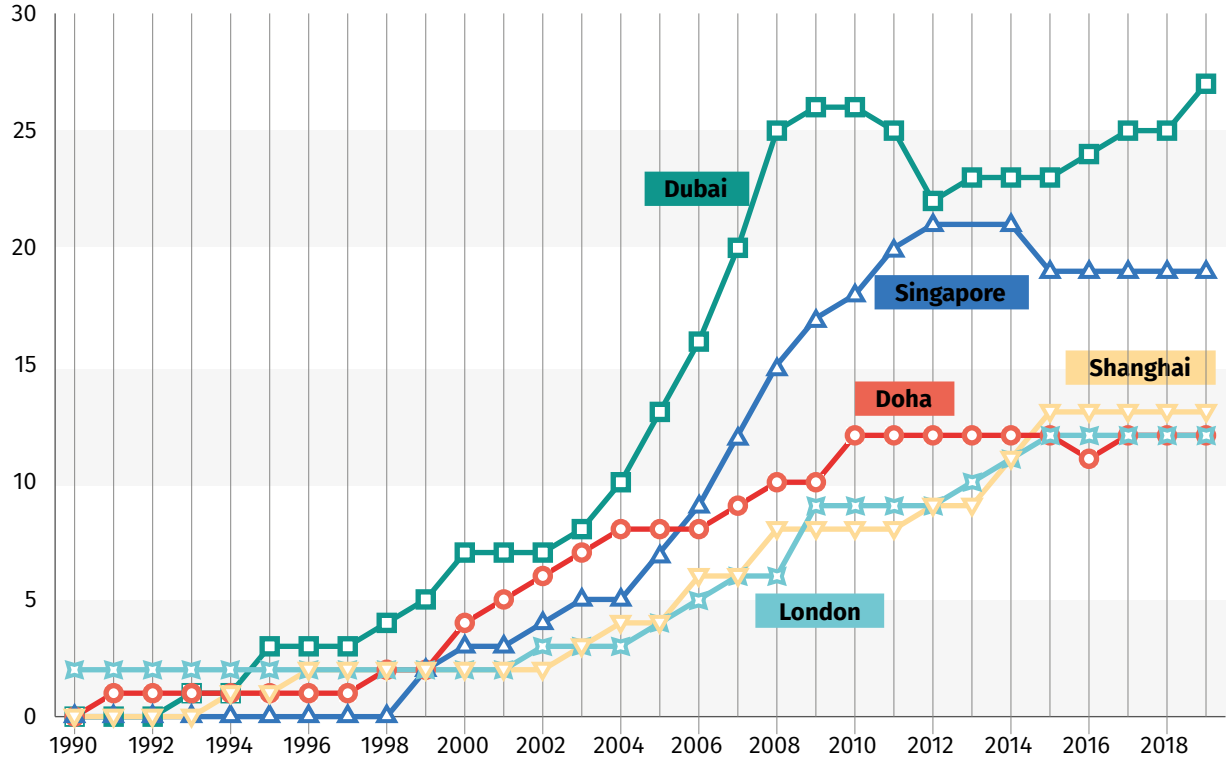
Paris stands out as the city which has exported by far the most campuses. This can be explained by the large campus networks of few French higher education institutions, many of which have their parent institution in Paris (see Section 4.A). Hosting the headquarters of similar global campus networks, cities such as Cyberjaya in Malaysia or St. Louis in the United States are as well listed as major exporters.

5.C – Offshore campus development in major importing cities

Figure 5.C illustrates how offshore campus development in major importing cities has grown continuously. Dubai and Singapore have imported by far the most campuses, particularly between 2004 and 2014. The cities started to import campuses at different points of time. In London, for example, the first campuses were opened relatively early. In 1990, London was already the destination of two campuses, while no campus had been opened in the other four cities. This remained unchanged in London until 2002, but has increased step by step afterwards. Shanghai has followed a very similar pattern to London. Dubai, Singapore and Doha share some characteristics and can be distinguished from Shanghai and London. They witnessed a steep increase of campus openings between 2002 and 2010. This growth has since slowed down after a certain threshold of imported campuses had been exceeded. The total number of offshore campuses in Dubai and Singapore even dropped at a certain point of time.

Campus development in major importing cities skyrocketed between 2004 and 2010

Figure 5.C: Offshore campus development in major importing cities



5.D – Cities' footprints in major importing countries

In some countries, offshore campuses concentrate in few cities

Figure 5.D lists the major country destinations of offshore campuses in 2019. For each of these countries, the figure additionally shows the city that has imported the most offshore campuses. In some countries, offshore campuses mainly concentrate in one city. For example, London accounts for 80% of all offshore campus destinations in the United Kingdom, and 66% of all campuses in the United Arab Emirates are located in Dubai. Those cities greatly contribute to defining their countries' roles as major importers of campuses. Although to varying degrees, the situation is mirrored in most other major importing countries where a single city is the main destination for offshore campuses such as Madrid in Spain. Only in China and Italy are offshore campuses more evenly distributed among several cities. Yet, still more than one fifth of China's imported campuses is located in Shanghai.

Figure 5.D: Cities' footprints in major importing countries

Major importing country	Offshore campuses	Major importing city	Offshore campuses	Share
China	67	Shanghai	15	22%
United Arab Emirates	44	Dubai	29	66%
Singapore	19	Singapore	19	100%
Spain	17	Madrid	8	47%
Malaysia	17	Kuala Lumpur	10	59%
United Kingdom	15	London	12	80%
Qatar	12	Doha	12	100%
Germany	12	Berlin	7	58%
Italy	11	Rome	4	36%
Mauritius	11	Flic en Flac	6	55%

Bird's eye view over Education City, Qatar. // Photo: Tim Rottleb

5.E – Transnational education zones

Some of the major campus importing countries follow a distinct spatial strategy to agglomerate their campuses in designated areas. Such areas are often branded as "education cities" or "education hubs". These terms often express aspirations rather than realities and are used indiscriminately to refer to nation states, cities or neighbourhoods. To overcome this fuzziness, we use the term transnational education zone (TEZ). TEZs are designated by governments as territorially defined areas (usually at the level of a city quarter) that host at least two offshore campuses, provide shared infrastructure and market themselves as education hubs or cities. Globally, eight of such TEZs can be identified, as summarised in Figure 5.E.

Governments embed TEZs in smart city projects or in national strategies to develop knowledge-based economies. Although these zones are branded similarly and follow similar logics at first glance, the figure shows that they differ substantially in various regards. For example, they range from 1,600 students (RAKEZ) to 78,000 students and staff (SEID) or host between three (EduCity) and 12 offshore campuses (DIAC). They also differ in terms of scale or stage of development. Uniciti Education Hub in Mauritius is, for instance, still at a very early stage of its development. In comparison, Education City in Doha has expanded over a very large area and provides shared facilities like a library, sport courts as well as a national university, schools and other research institutes. TEZs also differ regarding the universities they host. While some TEZs host universities that are rather unknown, the offshore campuses in Doha's Education City come from American elite universities.

Transnational education zones follow similar branding but different strategies

A country hosting many offshore campuses does not necessarily mean that the country also establishes TEZs. Five of the ten major campus importing countries do not have TEZs. Also, offshore campuses in countries with TEZs are not automatically located in the TEZ. In three countries – the United Arab Emirates, Qatar and Mauritius – there are as many offshore campuses inside as outside of the TEZs. In two countries, greater imbalance exists: whereas in China only about 8% of the offshore campuses are located in SEID, four of the five offshore campuses in South Korea concentrate in Incheon Global Campus.

Figure 5.E: Transnational education zones

Name:
Education City, Greater Doha Region

Launching Year: 2001

Country: Qatar

Operator: Qatar Foundation

No. of Students: 8,000

No. of offshore campuses: 8

Offshore campuses:
HEC Paris (FRA)
University College London (UK)
Carnegie Mellon University (USA)
Georgetown University (USA)
Northwestern University (USA)
Texas A&M University (USA)
Virginia Commonwealth University School of the Arts (USA)
Weill Cornell Medicine (USA)

Other Educational Institutions:
Domestic university, various domestic schools, training institutes, research institutes, medical centres, museum and library

Name:
Dubai International Academic City (DIAC)

Launching Year: 2007

Country: United Arab Emirates

Operator: TECOM Group

No. of Students: 27,000 (DIAC & DKP combined)

No. of offshore campuses: 12

Offshore campuses:
Curtin University (AUS)
Murdoch University (AUS)
SP Jain School of Global Management (AUS)
ESMOD (FRA)
Amity University (IND)
Birla Institute of Technology and Science Pilani (IND)
Institute of Management Technology (IND)
Manipal Academy of Higher Education (IND)
University of Saint Joseph (LBN)
Shaheed Zulfikar Ali Bhutto Institute of Science & Technology (PAK)
Heriot-Watt University (UK)
University of Birmingham (UK)

Other Educational Institutions:
Two domestic private universities

Name:
Dubai Knowledge Park (DKP)

Launching Year: 2003

Country: United Arab Emirates

Operator: TECOM Group

No. of Students: 27,000
(DIAC & DKP combined)

No. of offshore campuses: 6

Offshore campuses:
University of Wollongong (AUS)
Islamic Azad University (IRN)
Middlesex University (UK)
The University of Manchester (UK)
University of Bradford (UK)
University of Exeter (UK)

Other Educational Institutions:
Various international and domestic training institutes and language schools

Name:
Ras Al Khaimah Economic Zone (RAKEZ) – Academic Zone

Launching Year: 2017

Country: United Arab Emirates

Operator: RAKEZ

No. of Students: 1,600

No. of offshore campuses: 9

Offshore campuses:
Swiss Business School (CHE)
École Polytechnique Fédérale de Lausanne (CHE)
Munnar Catering College (IND)
Birla Institute of Technology (IND)
Sarhad University of Science and Information Technology (PAK)
University of Stirling (UK)
University of West London (UK)
Bath Spa University (UK)
University of Bolton (UK)

Other Educational Institutions:
Various schools

Name:
Uniciti Education Hub (UEH),
Flic en Flac

Launching Year: 2017

Country: Mauritius

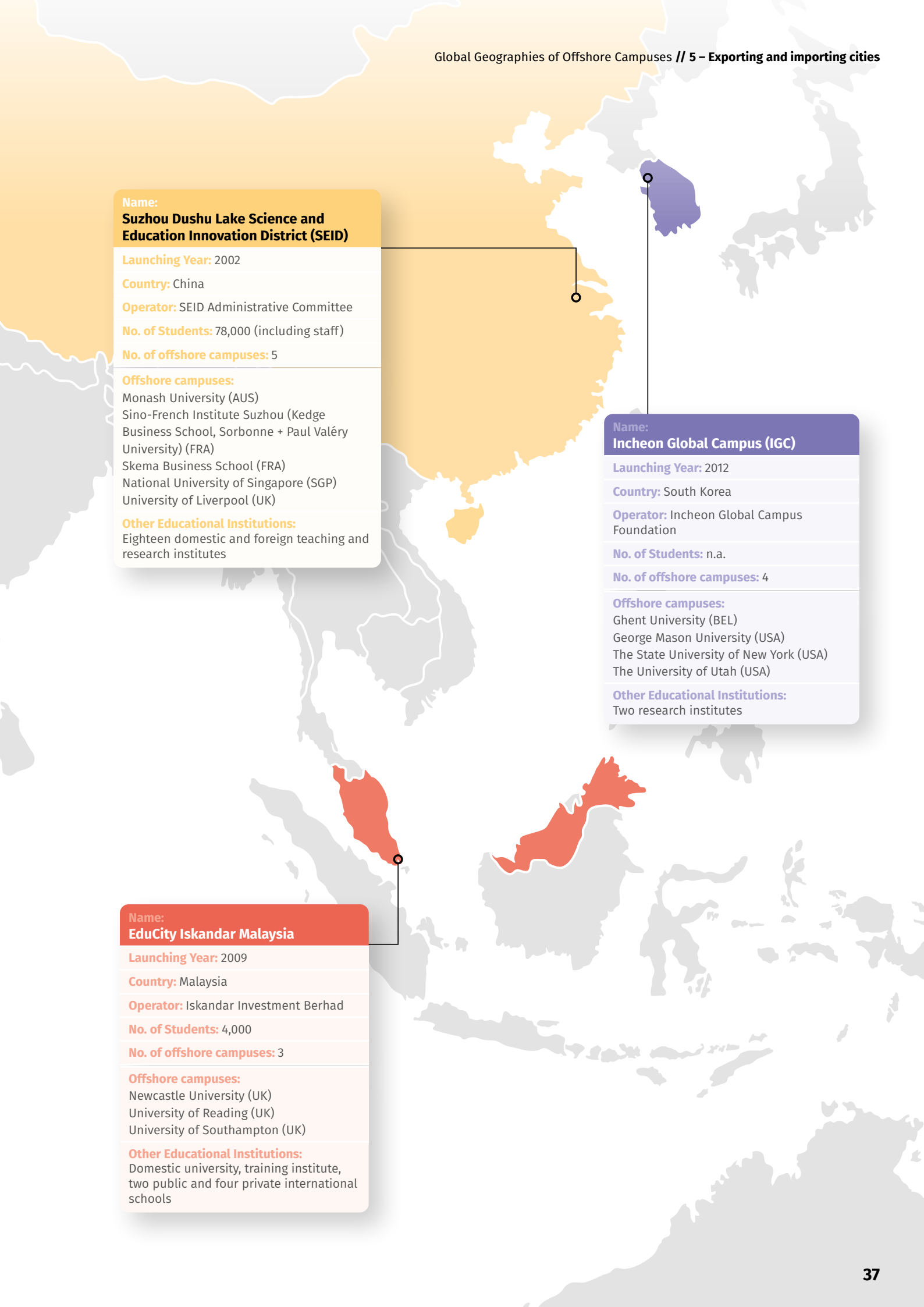
Operator: Medine Group

No. of Students: 1,900

No. of offshore campuses: 6

Offshore campuses:
Supinfo International University (FRA)
Vatel (FRA)
Université Paris II Panthéon-Assas (FRA)
École Nationale Supérieure d'Architecture de Nantes (FRA)
École Centrale de Nantes (FRA)
Middlesex University (UK)

Other Educational Institutions:
Executive education institutes and private schools



Name:
Suzhou Dushu Lake Science and Education Innovation District (SEID)

Launching Year: 2002

Country: China

Operator: SEID Administrative Committee

No. of Students: 78,000 (including staff)

No. of offshore campuses: 5

Offshore campuses:
Monash University (AUS)
Sino-French Institute Suzhou (Kedge Business School, Sorbonne + Paul Valéry University) (FRA)
Skema Business School (FRA)
National University of Singapore (SGP)
University of Liverpool (UK)

Other Educational Institutions:
Eighteen domestic and foreign teaching and research institutes

Name:
Incheon Global Campus (IGC)

Launching Year: 2012

Country: South Korea

Operator: Incheon Global Campus Foundation

No. of Students: n.a.

No. of offshore campuses: 4

Offshore campuses:
Ghent University (BEL)
George Mason University (USA)
The State University of New York (USA)
The University of Utah (USA)

Other Educational Institutions:
Two research institutes

Name:
EduCity Iskandar Malaysia

Launching Year: 2009

Country: Malaysia

Operator: Iskandar Investment Berhad

No. of Students: 4,000

No. of offshore campuses: 3

Offshore campuses:
Newcastle University (UK)
University of Reading (UK)
University of Southampton (UK)

Other Educational Institutions:
Domestic university, training institute, two public and four private international schools

Transnational education zone strategy in focus // Dubai

Dubai is the only city with two TEZs

Dubai is the only city with two TEZs: Dubai Knowledge Park (DKP) and Dubai International Academic City (DIAC). Both TEZs are managed by the same holding company, the TECOM Group, and provide infrastructure, pre-built facilities and available space for universities' own buildings. The two TEZs claim to serve over 27,000 students from multiple countries. Their offshore campuses originate from seven different countries, including Wollongong University from Australia, the University of Manchester from the United Kingdom, BITS Pilani from India and Université Saint Joseph from Lebanon. According to TECOM advertisements the university clients are offered a wide range of services such as different land and office size options, support in visa matters or in creating networks with local partners. While TECOM acts as landlord, the foreign universities' academic programmes are overseen by the Knowledge and Human Development Authority (KHDA), an arm of Dubai's government, which also advises in the design of new programmes and acts as an intermediary to the government. Moreover, both TEZs are free zones under Dubai law, meaning that the foreign universities are exempted from certain regulations and the United Arab Emirates' national accreditation system.

Dubai Knowledge Park was established in 2003 in a central location close to Dubai's financial district, with the purpose to provide training and human resources for the neighbouring free zones Media City and Internet City. Dubai International Academic City, the larger of the two TEZs, was launched in 2007. It is located more remotely on the southeastern fringes of Dubai and provides plenty of space for universities to construct their own individual full-fledged campuses.

When Dubai initiatied an international education hub strategy at some point in the 2000s, all offshore campuses from DKP were planned to be relocated to DIAC. Yet today DKP continues to expand: it still hosts six foreign universities, some of which are enlarging their campuses, and other foreign universities in Dubai are even considering to relocate their campuses there. Simultaneously, several large projects are currently under development in DIAC as well, such as the University of Birmingham's new campus and the TEZ's first private student housing complex.

Main building of Dubai International Academic City, United Arab Emirates. // Photo: Tim Rottleb

Research Group "TRANSEDU":
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