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Branding of Germany's transnational education and its potentials in the Arabian Gulf Region

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Abstract: In responding to the growing global demand for education, transnational education (TNE) plays a fundamental role in the current debate on the internationalisation and globalisation of higher education. Through conducting a systematic literature review, this paper examines the unique features of German transnational education, which has little in common with the American, Australian and British models, the reasons for its limited presence in the Gulf and its potential for having a stronger footprint. The Gulf Region is the largest importer of foreign education, and yet German TNE is only represented by one university compared to the relatively large number of USA, UK and Australian higher education institutions. Although the Gulf Region is considered as a lucrative and attractive market for foreign education, the lack of engagement of German TNE there could be interpreted through public policy-related reasons. Since Germany has already established its footprint in creating a unique brand of TNE, the paper recommends building upon the country's expertise in low-risk option in order to invest in the Gulf. For this to materialise, Germany must build awareness of its unique brand to stand out among the competition.

Subjects: Education Studies; Higher Education; Education Politics

Keywords: transnational higher education; branch campus; foreign-backed university; German-backed university; internationalisation of higher education; Germany; Gulf States

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PUBLIC INTEREST STATEMENT

The Gulf states have achieved remarkable development in their education landscape by attracting foreign higher education institutions, making the Gulf one of the largest regions in the world to import higher education. However, in contrast to the large number of American, British, French, and Australian universities, only one German university operates in the Gulf, despite the values that German universities could bring to the region, especially their innovative approaches in applied research and the quality of their education in manpower- and cost-intensive disciplines, such as natural sciences, engineering, and technology—areas that are highly required for building a knowledge-based society as envisioned by the Gulf states. Exploring the unique features of the German version of transnational education (TNE), the reasons behind its lack of engagement in the Gulf, and the prospect of German TNE having a stronger footprint there, this study suggests that German universities need to do more to make themselves known in the region, test a new model of partnership, and build awareness of their unique brand.

1. Introduction

Transnational education (TNE) is often considered as part of international education. International education comprises both students' mobility among education programmes, in other words, international student recruitment, and their access to the cross-border mobility of both education programmes and higher education providers, which is termed as transnational education (Caruana & Montgomery, 2015). The rapid growth of transnational education is driven by the enormous increase in global demand for higher education (Caruana & Montgomery, 2015). Students across the globe are increasingly choosing to enrol in international higher education programmes without having to travel to the country awarding the qualification.

There are many motives for sending institutions to engage in such type of education, exercising full control over delivery, reputation in an increasingly competitive transnational education market and generating new income that sustains parent institutions (Verbik, Rumbley, & Altbach, 2006). As for the hosting institutions in emerging economies and developing countries, they anticipate that importing education will open up new opportunities for their young generations to obtain qualifications in their own countries. Realising that the demand for skills and competencies amongst the workforce is increasing, these factors make education import a good option for many developing countries.

Globalisation and the internationalisation of higher education continue to stimulate universities to locate themselves in the transnational education market. In the early 2000s, German universities, as sending institutions, began to explore the international higher education market. Since then, a unique German model of TNE has developed and positioned itself globally (Clausen, Schindlerkovats, & Stalf, 2011). By venturing abroad, German universities anticipate being able to enhance their visibility and international reputation, network with new partners for cooperation in teaching and research and reach new students (Rüland, 2014). Although financial gain is a driving factor for the emergence of TNE, "most German TNE ventures have been driven by the idea of mutual benefit through cultural exchange and they therefore differ in their genesis and practical nature from American, British or Australian projects" (Clausen et al., 2011, p. 2).

The Gulf States—Kuwait, Saudi Arabia, Bahrain, Qatar, the United Arab Emirates and Oman, all members of the Gulf Cooperation Council (GCC)—have succeeded in making remarkable developments in the education landscape by hosting renowned foreign higher education institutions, making the Gulf Region one of the largest importing regions of higher education in the world. However, compared to the US, British, French and Australian universities, the German institutions are under-represented in the Gulf Region, this despite the fact that the socio-economic transition processes in the GCC countries are generating huge potential for international cooperation in higher education, bearing in mind the role the universities play as powerful engines of social, cultural and economic development.

According to the Cross-Border Education Research Team [C-BERT] (2017), over a quarter of the total estimated 249 branch campuses spread worldwide are located in the Gulf region, the majority of which have opened within the last few decades. The UAE alone accommodates 37 foreign campuses (plus three which are currently under development) and, as such, has become the largest host of international branch campuses in the world, with the UK being the largest sender of HE to the UAE (QAA, 2014). Out of the 37 IBCs, only Dubai has taken an aggressive approach in attracting foreign universities aiming to become an educational hub, accommodating 29 campuses (C-BERT, 2017). They actually used to be 44 international branch campuses, before some 7 campuses closed in the period from 2005 to 2013 (Ashour & Fatima, 2016). The second largest importing country in the Gulf is Qatar, which accommodates 11 foreign institutes; Bahrain 3 and Kuwait 2; while Oman accommodates 1 university. Among the total 54 IBC institutions in the Gulf, 17 are American, 11 British and 4 Australian branch universities. However, of the foreign institutions operating in the Gulf, only one German University exists in Oman.

German Government and the German Academic Exchange Service's (DAAD) official reports suggest that German universities need to expand and experiment with new forms of transnational collaborations by approaching new partners. By conducting a systematic review of peer-reviewed journals, official reports and websites, this paper appraises and synthesises the empirical evidence to answer the following research questions: (1) what differentiates German TNE from the American, Australian, or UK TNE forms; (2) what are the reasons behind the lack of engagement of German TNE in the Gulf region; and (3) what are the prospects of German TNE having a stronger footprint in the Gulf. This research will contribute to the current discourse on the TNE as a dynamic and increasingly complex phenomenon of higher education internationalisation and will nurture a policy debate for exploring a new market for German TNE in the Gulf region.

2. Challenges in defining and mapping TNE

In an attempt to distinguish itself from international, which focuses more on the mobility of students, the TNE involves the movement of academic programmes and providers between countries. The literature suggests that terminology is a key challenge in understanding transnational higher education. Various terms are often used interchangeably to describe manifold modes of provision (Caruana & Montgomery, 2015; Knight, 2016). Caruana and Montgomery (2015) argue that TNE has gained its meaning through practising it—not through the theoretical foundation of the term.

Before defining the term TNE, it is important to clarify why and how the term TNE has evolved. Over the last five decades, one of the primary concerns in international higher education has been the mobility of students in general, and the recruitment of international students in specific. The attraction and support of international students who take their full degree in a foreign country was seen as a top priority during the 1950s (Knight, 2016). However, in the 1990s, there was a growing interest and a large number of institutions/providers offering their academic programmes to students in their own countries. Instead of students moving to foreign countries, the programmes were moving to the students in their home countries.

English-speaking countries, and more specifically Australia, were the pioneers in transnational education. The genesis of the term transnational education refers back to the early 1990s when Australian HEIs increased their international higher education provisions for offshore and onshore students (Fromm, 2014). Transnational education was, therefore, familiarised from an empirical angle "... to differentiate between international students recruited to Australian campuses and those who were studying for Australian degrees offshore" (Knight, 2005, p. 5). British and American higher education institutions engaged in transnational education slightly later (Clausen et al., 2011). Today, American institutions dominate this type of overseas delivery (Verbik et al., 2006).

The rapid development of transnational education across the globe is the result of a number of factors. The reduction in state funding for Australian universities in 1989 created the need to produce additional sources of income using the tuition fees paid by international students to subsidise university costs (DAAD, 2014). As a result, universities increased their efforts to recruit international students. Some students, however, could not afford the rapidly increasing tuition fees. So, the idea to offer programmes outside of Australia, at lower cost, by employing local teaching staff, supported Australian universities in reaching new target groups. This was the genesis of the TNE programmes and providers' mobility (Knight, 2016).

At that time, there were four terms: cross-border, transnational, offshore and borderless education, which were used predominantly and interchangeably in the debate on the mobility of programmes and providers (Knight, 2005). A decade later, cross-border higher education and TNE were the most frequently used terms. Although Knight (2016) believes that Cross-Border Higher Education is more explicit, the term *transnational education*, defined as "the mobility of an education programmes or higher education institution (HEI)/provider between countries" (British Council & German Academic Exchange Service, 2014), is used in this article to ensure consistency with the German literature. According to Healey (2016), trans-nationality is intrinsic in any of the TNE

definitions, namely the university awarding the degree is in a country that is different from the country where the students are.

Another challenge discussed by Scholars (Knight, 2005, 2016) point out a tremendous growth of new forms of TNE programmes and collaboration. Different players, new forms of partnerships, new delivery mechanisms and new arrangements and procedures are constantly evolving. Despite attempts by Knight (2016) and Knight and McNamara (2017) to draw a framework to differentiate between different types, to date there are no consistent international TNE terminology or classifications. Therefore, DAAD and DZHW (2017) point out the challenge in making a reliable comparison of TNE offerings between different providers. Knight (2016) denotes that as new forms of TNE appear, the vocabulary of TNE is mushrooming. The literature suggests distance learning, validation, franchising, co-founded universities, collaborative programmes, international branch campuses and foreign backed-universities as various forms of TNE. TNE is expected to see exponential growth and further expansion of flexible modes of delivery (British Council, 2012), which merit closer examination (Knight, 2016) to provide an update of definitions which will allow more reliable data comparison.

With regard to such a complex and multi-layered phenomenon as TNE, mapping these forms is, therefore, a difficult task. Despite their benefits, Knight (2016) and Knight and McNamara's (2017) proposed frameworks carry potential risks of standardising the forms of TNE, which already have a dynamic nature. Another risk is that these terms do not match well with both sending and hosting countries' strategy of the internationalisation of higher education (Knight, 2015a). Having a common framework might also be a barrier to universities exploring new innovative forms of transnational collaborations or eliminate some significant cross-border ventures from comparisons, simply because they do not fall within any of the framework's categories. In view of Knight's analysis, one could argue that Germany has also developed its own understanding, terminology and concept of TNE.

3. The German brand of TNE

German TNE activities differ from those of other countries in terms of motive and approach. Elliott (1997) was one of the first in the field to argue that UK policy emphasises HE as a tradable activity generating foreign currency from the recruitment of international students and distance learning programmes. This is a fundamental principle that significantly differentiates the UK, Australia and USA from the German Brand of TNE.

3.1. The driving rationale

Three public policy-related factors played a decisive role in shaping German TNE. Germany is one of the few countries where education is perceived as a public good and where there are almost no or very low tuition fees for national or expatriate students. For these countries, it might be considered unethical to establish for-profit ventures abroad when higher education is free to students at home. According to Van der Wende et al. (2005), executives in German higher education institutions used to claim that they were unable to charge tuition fees abroad because they do not charge at home. A few German institutions have established not-for-profit campuses abroad. For example, the Technical University of Berlin has a campus in Egypt, in a non-profit public-private partnership, that offers graduate programmes in energy engineering, urban development and water engineering (Wilkins, 2015).

Germany engages in TNE to fulfil foreign, cultural, education and development policy targets through "education export" (Kammüller, 2017), and strengthening its global presence is both politically and institutionally motivated (Fromm, 2014). According to Kammüller (2015), three main German Federal Institutes are supporting TNE Initiatives: first, the Federal Ministry of Education and Research (BMBF), part of whose policy agenda is to support internationalisation of German Higher Education and enhance its competitiveness in the international higher education market and marketing of German HE and research. The second is the Federal Foreign Office, which supports higher

education abroad and uses it as a “soft power” vehicle of foreign cultural policy. The third institute is the Federal Ministry for Economic Cooperation and Development (BMZ), which promotes capacity building and cross-cultural dialogue by supporting TNE in developing countries. Based on these motivations, the German federal government began to encourage specific forms of transnational engagement.

In addition to the strategic embedding, Fromm (2014) highlights another important feature that indicates strong national-level incentives. In contrast to other countries, the German approach is characterised by federal financing of transnational education programmes. The German Government and DAAD provide a funding scheme and, thus, encourage German HEIs to engage in TNE. The call for proposals is open for engagement in any discipline or target country. Applications submitted by universities to DAAD are expected to demonstrate appropriate knowledge of the context and the feasibility of the proposed project. Although government funding of TNE in Germany is guided by broader political goals, it is the German universities who decide to engage or not to engage in a TNE project. Their choice of partners and locations follows their own institutional strategies, which might involve very specific academic goals, research priorities, etc. However, there are rare exceptions where German bi-national universities were initiated from a political level, usually by concluding an MoU between the German and the host country government based on mutual interest. In contrast to other TNE providers, where institutions do not receive financial support for establishing exported education projects, German transnational education projects have thus received, or are receiving, start-up state-funding for a period of four to six years before they must take responsibility for their own financial sustainability (Fromm, 2014). It is, therefore, government funding that encourages German higher education institutions to engage into TNE initiatives (Clausen et al., 2011).

Since 2003, the government has systematically supported engagements of German universities abroad by providing funds through DAAD (Rüland, 2014). Even in the context of less complex TNE projects, such as the study courses taught in German offered abroad, long-term support from public funding may be necessary from a foreign and education policy perspective (DAAD, 2014). Over 80 German TNE ventures worldwide are currently sponsored by the DAAD or received support at their initial stages (DAAD and DZHW, 2017, p. 34). The German Government provides financial support to enable German HEIs to venture into TNE, while the hosting partner provides the infrastructure and the costs of administrative and local teaching staff.

Since education in Germany is classed as a public good, Kammüller (2017) indicates that financial gain has never been a decisive factor for German universities to venture abroad. To date, the more profit-oriented models of TNE, such as distance education, validation and franchising types, remain unexplored in Germany. On the contrary, German TNE’s approach is to contribute to capacity building of the education system in the host countries as part of Germany’s development cooperation policy (Trines, 2016), emphasising financial sustainability over financial gain. This is also supported by the fact that the US and UK Governments, unlike Germany, do not provide any sort of financial support for their TNE ventures abroad (Clausen et al., 2011).

While Australian, British and American universities predominantly export management, business and computer sciences, German education mainly focuses on exporting educational programmes, such as engineering and natural sciences, art, music, archaeology and Egyptology. As these subjects require greater financial investment in laboratories, equipment and lower student-staff ratio, they thereby carry a greater financial risk and a lower return on investment. Clausen et al. (2011) point out that this pattern has shifted the financial expectations towards a more realistic target of breaking even. Therefore, subsidies from governments, private investors and donors are always required in some models, such as the German-backed (bi-national) university scheme (DAAD, 2014). Thus, the venturing of German universities into TNE was never initiated, at least in its early stages, from a financial perspective. Partnership models that take into account both partners’ interests are at the forefront (Clausen et al., 2011).

3.2. *Win-win nature of partnership*

In support of scholars' arguments pointing out the constant advent of new forms of TNE collaboration, Germany has also developed its own approach and forms of TNE. Alongside the USA, the German universities have been pioneers in introducing the collaborative model of transnational education (Lanzendorf, 2008a), which exhibits the win-win nature of partnership for both partners. DAAD (2014) argues that German universities have succeeded in establishing their own partnership pattern in the field of transnational education. The win-win's essence of German TNE was emphasised in all DAAD official reports and was made evident in the "Code of Conduct for Higher Education Project Abroad", which was adopted in May 2013.

3.3. *Modes of delivery*

There are various models that have been introduced in the international education landscape, but have not as yet been tested by German universities. Those models are validation, franchising and distance learning. In Germany, only three modes of TNE delivery have emerged and established themselves in the higher education market.

3.3.1 *Mode one: Collaborative TNE form*

This is referred to by DAAD's official reports as a "typical" model of German TNE. Usually, German TNE degree programmes are initiated by personal academic contacts and designed and implemented through a collaboration of both countries' institutions. The "typical" model of German TNE exports a specific Bachelor, Master or, to a lesser extent, PhD degree programme from a German to a foreign university. This category also includes the German language degree programmes (DAAD, 2014). In most degree export programmes, the foreign partner essentially provides the infrastructure and plan curricula, systems of shared teaching and students' services together with the German home institution. The German partner, meanwhile, is responsible for the academic and the remaining administrative responsibilities. The DAAD's funding programme, "Transnational Education—Higher Education Projects Abroad", was developed to cover this type of collaboration (DAAD, 2014). These collaborations are considered as "partnerships on an equal footing and usually stem from long-standing, mutually beneficial study exchanges or research collaborations" (Clausen et al., 2011, p. 4). The authors believe that this approach proved successful since it builds on the host country's demand for the programme and is founded on functional cross-border communication and structures.

3.3.2. *Mode two: International branch campuses (IBCs)*

International branch campuses (IBCs) have emerged as a distinct form of the internationalisation initiatives of higher education institutions. IBC is defined as "an entity that is owned, at least in part, by a foreign education provider; operated in the name of the foreign education provider (author's emphasis); and provides an entire academic programme, substantially on site, leading to a degree awarded by the foreign education provider" (Garrett, Kinser, Lane, & Merola, 2016, p. 17). DAAD (2014) describes it as a branch of a German university abroad that does not necessarily require a foreign university partner. A branch of a German university is located in another country, which serves as a "host", taking into consideration local regulations pertaining to a foreign provider. The parent university is fully responsible for teaching and administration and the degrees awarded are those of the German university. Garrett et al. (2016) denote that, in anticipation of enhancement of their student recruitment, revenue, research collaborations and branding, HE institutions rushed in the 2000s to set up "shop", mainly in certain Middle Eastern and Asian countries. Some of these ventures dramatically failed and were closed, while others have succeeded. The top exporting countries are the United States, the United Kingdom, Russia, France and Australia. Together, these countries account for 181 branch campuses, or 73 per cent of the world's IBCs (Garrett et al., 2016).

German HEIs rarely set up stand-alone offshore ventures. This type, which is favoured by Australian universities, is only gradually finding a place in Germany, and relatively few German universities have established international branch campuses (Clausen et al., 2011). Among the 249 branch universities spread worldwide (Garrett et al., 2016), only 4 are German (C-BERT, 2017). A recent survey

conducted by the German Science Council identified six international branch campuses of German HEIs (DAAD and DZHW, 2016). The variation in numbers validates the blurring boundaries between IBCs and foreign-backed universities. According to DAAD and DZHW (2016), these low numbers show that branch campuses are a niche phenomenon among more than 80 German TNE projects.

It is worth noting that “those few known examples of branch campuses spring from German universities hold high positions in international rankings” (Kammüller, 2017). These branch campuses, as named by the author, are the Egyptian campus of Technical University Berlin in El Gouna, Heidelberg University’s Heidelberg Center for Latin America in Santiago de Chile and the German Institute of Science and Technology - TUM Asia, the Singapore branch of Munich Technical University.

Successful international branch campuses have, therefore, the potential to enhance the reputation and legitimacy of the home institution; they improve local integration, are sought by partners to address skills shortages and offer better employability prospects. Nevertheless, they demonstrate the challenges of partnerships with the private sector, be it local or German, which carry some potential risks of compromising the independence of research and teaching (Clausen et al., 2011).

3.3.3. *Mode three: German-backed universities (bi-national)*

Foreign-backed institutions, in some literature referred to as bi-national universities, appeared in the 1990s. They are defined by Verbik et al. (2006, p. 4) as “typically new institutions established within the local (host country’s) higher education system and jurisdiction but with substantial support (especially initially) from foreign providers, often through a consortium formed expressly for the purpose of this activity”. According to Verbik et al. (2006), the foreign institute provides technical and academic (not financial) curriculum development, quality assurance and the training of local teaching staff.

Foreign-backed institutions are considered by Lanzendorf (2008a) as legally independent local universities that are academically associated with one or several universities in another country. Unlike a branch campus, which is established by a foreign academic institution, a foreign-backed university is set up by local investors, and/or hosting governments, who provide the necessary funding for a new university, while “academic mentor” or “patron” universities are held responsible for academic aspects. According to Lanzendorf (2008b), usually a consortium of German universities, not a single institution, backs the foreign university. This pattern is helpful because it offers the German-backed university the opportunity to engage with German higher education institutions of different sizes and specialisations, as is the case of the Vietnamese-German University (Clausen et al., 2011). A degree earned by the foreign-backed institutions is recognised in the foreign country (Verbik et al., 2006).

Besides Germany, the US and British universities, as well as France, Canada and Switzerland are actively involved in providing a foreign-backed model; Australia, surprisingly, which is a main provider of branch campuses, is not active in this field (Lanzendorf, 2008a). A unique distinction of German-backed universities, however, is their relatively strong German national features, in contrast to, for example, British and French-backed universities (Lanzendorf, 2008b). Study exchanges or internships in Germany, German language courses, are integral components of any TNE project.

German-backed universities, like any other TNE project, also fulfil foreign, cultural or international development policy. They often, but not always, are driven from an intent declared by two heads of state or ministers, i.e. following “top-down” approach (Clausen et al., 2011). According to DAAD and DZHW (2016), German-backed universities account for a large share of TNE students, e.g. the German University Cairo (GUC) with almost 12,000 students, the German Jordanian University in Amman with more than 4,000 enrolments and the German University of Technology in Oman (GUtech) with more than 1,100 students (DAAD and DZHW, 2016, p. 88). C-BERT (2017) list GUtech as an IBC; however, all German official reports put it under the German-backed university model.

This model can be also seen as another form of partnership model for TNE that fulfils both partners' interests (Clausen et al., 2011). Verbik et al. (2006) believe that risk sharing, a reduced number of resources required and international reputation are all advantages that encourage foreign institutes to engage in these models. However, the author views that the independence of the foreign-backed institution may pose a risk since foreign partners have less control over provision, and, if things do not go well, there might be reputational risks for mentoring foreign universities.

4. The distinct Niche of the German TNE

With transnational education, Germany aims to strengthen the international reputation of its universities, promote the academic principles and structures of the German system of higher education and contribute to competence-building in developing and emerging countries (DAAD, 2015). In fact, Germany also strives to implement and promote its own brand in transnational education, which distinguishes itself from other foreign providers. German TNE is also seen as an attempt to expand research collaborations across national boundaries worldwide (Fromm, 2014). The objectives of German universities involved in TNE, on the other hand, are to enhance their reputation and to target new students, and create research and teaching networks. This is in agreement with Garrett et al.'s (2016) argument that cross-border institutions have pursued foreign institutions as a way to have an international presence, promote their brands and open new markets. As the authors put it, "institutions that invest in IBCs are playing the long game, betting on a more globalized future where deep international presence is seen to define a university" (p. 8).

German TNE follows either bottom-up or top-down approaches. The bottom-up approach involves the kind of relationship in which German universities are a desirable collaborative partner. Partnership with any foreign institute should be conducted on equal terms. It is strongly believed that this ensures success and sustainability. The larger the institution, the more tendency towards adopting a top-down approach.

A connection with Germany is upheld in all types of German TNE projects; this feature motivates host countries to partner with a German institution. The connection occurs through the provision of German language courses. For 76 per cent of TNE students, German language lessons are part of the mandatory curriculum, while another 18 per cent can choose elective options to acquire language skills in German. Study stays or internships in Germany are a part of the curriculum in 43.3 per cent of German TNE courses. Another 51.7 per cent of programmes offer fully integrated optional study stays in Germany (DAAD and DZHW, 2016, p. 90).

Another intrinsic feature to all types of German TNE is the design and contents of the curricula in German TNE ventures, which are developed and monitored according to the quality standards of German universities. A German transnational education project implies that the academic responsibility lies with the exporting parent institute. The German system of higher education puts emphasis on linking research to teaching, and academic self-government involving all members of the university. It is also mainly concerned by producing autonomous students who are capable of engaging in critical debate and equipped by research skills. These are all features that most clearly create a distinctive brand for the "German" quality of "exported" courses (DAAD, 2014).

The German TNE model also offers cost- and staff-intensive subjects of Engineering, Natural Sciences and technology-based disciplines, supported through a network of work placements and business contacts. Clausen et al. (2011) assert that applied sciences, as the main provision of German universities, have become a trendy and desirable export product by hosting countries and are seen as a unique German feature of the German TNE. This strongly distinguishes German TNE from the American and British models, which mainly exports business and IT courses. One of the largest export projects adopting this system of applied learning and teaching is the German-Jordanian University (DAAD, 2010).

Another important aspect that differentiates German TNE from other providers, as argued by Clausen et al. (2011) and DAAD (2014, 2015), is that the moderate living expenses and nominal student fees in Germany make the financial gap between transnational and home-delivered German programmes not as huge as in the UK and USA. This can play a negative role for a foreign student to enrol in German TNE degree programmes. The authors see that this could pose a challenge for German TNE and, thus, it has to offer added value and more options for target groups who are restricted from going abroad by cultural barriers. These added values in their view include, for example, a reputation for excellence in certain subjects, such as Engineering and Natural Sciences, unique curricular content, innovative combinations of degrees, collaborations with the industry or between research-led and applied learning institutes and/or special cultural induction, tutoring and mentoring programmes. Also, in offering multidisciplinary degrees, which are extremely lacking in the Middle East.

It is evident that German TNE focuses on the export of degree programmes and German-backed universities (bi-national), rather than on international branch campuses. Programmes of this type receive 45.7 per cent of enrolled TNE students (DAAD and DZHW, 2016, p. 90). This figure reveals that bi-national universities receive great consideration in the German TNE model and, therefore, there is much potential in this field on which Germany can capitalise.

5. Transnational education in the Gulf Region

The six member states of the Gulf Cooperation Council (GCC)—Kuwait, Saudi Arabia, Bahrain, Qatar, the United Arab Emirates and Oman—have been undertaking an amazing development of their higher education landscapes by attracting prestigious foreign higher education institutions, making the Gulf one of the highest importing regions of higher education in the world. Aligned with their increasingly booming private sectors, the number of international and private institutions has noticeably increased in the Gulf States over the past decades to meet the needs of their national population and expats (Coffman, 2003). This has been in response to government policies that have encouraged the establishment of local campuses of renowned foreign universities with the aim of opening up the sector to new practices and competition (Dakhli & El-Zohairy, 2013). By founding world-leading universities, the Gulf's political leaders seek to close the “development gap” and transform their societies from knowledge-recipient to knowledge-producers.

Some Gulf States—UAE, Qatar and Bahrain—have followed a similar approach of establishing regional education hubs through the import of foreign provision. Knight (2015b) points out that the academic hub model for transnational import is only seen in the Gulf States, which have the financial resources to attract high-ranking universities. Dubai, in the United Arab Emirates, created the Knowledge Village in 2003 and the Dubai International Education City in 2007 as the world's largest free zone dedicated to higher education. Aiming to attract foreign universities, both initiatives provided physical infrastructure, tax incentives and exemption from the federal regulatory system. The UAE has become the largest host of IBCs in the world by accommodating 32 campuses, representing 13 per cent of all IBCs worldwide. Dubai alone accommodates 24 branch campuses (C-BERT, 2017). Qatar has taken a different approach, inviting and sponsoring six American institutions, one from the UK, two Canadian, one French and one Dutch university to offer their full degree programmes and qualifications to Qatari and regional students (C-BERT, 2017). The initiative is entirely funded by the Qatar Foundation (Knight, 2015b).

By establishing educational hubs, both UAE and Qatar aim to position themselves as regional hubs of high-quality education, aiming to attract students from other countries (Coffman, 2003). Madichie (2015, pp. 3–4) remarks that financial accountability in the UAE seems more balanced since foreign provisions have to cover their own expenses under co-investment plans. Whilst there are only 76 host countries that allow foreign education providers to open foreign branches, UAE and Qatar are among the top five host countries to foreign education; the others being China, Singapore and Malaysia (Garrett et al., 2016). Although IBCs in most of the countries are “niche players”, as Garrett et al. (2016) put it, foreign branches make up a significant share of the total higher education

enrolment in the United Arab Emirates (UAE). The Gulf state of Bahrain has also established a Higher Education City as another example of regional education hubs by importing foreign provision, including a well-developed branch campus of a US university (the Observatory on Borderless Higher Education, 2007). The hub is aimed at increasing national workforce and reducing study abroad rates.

Whilst Qatar and the UAE, and to lesser extent Bahrain, have opened up to numerous foreign institutions, both Oman and Saudi Arabia lag behind in this area. Both countries have not yet shared the other member states of the GCC's strategic vision of creating an educational hub to attract foreign students. Oman's agenda for higher education, nevertheless, mainly responds to the domestic needs of the Omani population, where private HEIs exist in conjunction with foreign partners. In contrast to most foreign universities operating in the UAE, Bahrain or Qatar, the tuition fees and the costs of living are comparably much lower in Oman (Brandenburg, 2012). In the Kingdom of Saudi Arabia (KSA), although transnational HE did not formerly exist, there is a recently growing trend towards internationalisation. KSA's top universities are now adopting a policy of increased international collaborations, which is manifested by the entering of the King Abdullah University of Science and Technology (KAUST) into collaborative ventures with 27 foreign universities and the creation of 5 international academic excellence partnerships (Madichie, 2015). As part of its privatisation strategy initiated in 2000, the Kuwaiti Government has taken fundamental steps in facilitating private higher education and has licensed 16 universities (Belhouli, Falasi, Abul, & Fox, 2017), 3 of which are foreign institutes. The American University of Kuwait (AUK) was established in 2003 as Kuwait's first liberal arts university. Kuwait also accommodates other two branch campuses, one is Australian and the other Dutch (C-BERT, 2017).

Further to policy directions towards internationalisation, there is cultural aspect that plays a significant role in importing foreign education to the Gulf. Females in the Gulf must be educated in their home countries since they are not allowed by their families to join universities abroad. Many students in the Gulf are, therefore, seeking foreign-quality programmes in their own countries as an alternative to travelling abroad (Coffman, 2003).

Examining the benefits from foreign universities in the Arab Gulf States, Wilkins (2011) advocates the view that foreign higher education in the Gulf States contributes to the nationalisation of the labour market, enhancing of the employability of students and reducing the currency outflows due to studying abroad. The author believes that international institutions are equipping students with the theoretical concepts and skills needed for diversifying the Gulf States' economies and building an innovative, knowledge-based society. Recently, many of the foreign campuses have created strong research bodies and introduced doctoral programmes in order to increase their research engagement and boost their reputation.

Coffman (2003, p. 18) argues that the American model dominates in the Gulf; "wholesale adoption of the American university model as the dominant standard" is one of the most distinctive criteria of the rapidly evolving Gulf higher education sector. The author supports his view by stating: "While the British and Australians have set up a number of degree programs and even campuses in the Gulf, they still operate in the shadow of the American behemoth that has already gained supremacy throughout the region". This is supported by the fact that some Gulf States subsidise the cost of construction and sometimes pay for the salaries of the academic staff, resulting in little financial overheads for American universities. Coffman (2003) and Fahmy (2014) believe that these institutions could probably play a cultural and political role and have, on the one hand, strong potential to act as conduits for building better understanding and relations with host countries, while enhancing the visibility and the international image of US institutions on the other. This could be also the case for Germany when seeking a potential for establishing a presence for its higher education institutions in the Gulf.

6. German University of Technology (GUTech) in Oman

The German University Technology (GUTech) in Oman is the only German university in the Gulf. It has been established as a result of a long-standing cooperation between RWTH Aachen University in Germany, one of the top-ranked universities of technology in Europe, and the Sultanate of Oman. This cooperation began with the archaeological research conducted by the German Professor, Dr Michael Jansen, at RWTH Aachen University in Oman. The university was approached with the intention of bringing German quality education to Oman. Since a bilateral agreement is a prior condition, and provides a regulatory framework for the establishment of a foreign-backed university (Fromm, 2014), an MoU was signed between Sultan Qaboos University in Muscat and RWTH Aachen University in 2000 (GUTech Website). In August 2006, Oman Educational Services L.L.C. (OES), a limited liability private company under the laws of the Sultanate of Oman, was created to formally establish the university. This agreement laid the foundation for the establishment of a private German university in the Sultanate of Oman, and encouraged collaboration between OES and RWTH Aachen University in terms of development of academic curricula, quality assurance and administration. In 2007, GUTech gained accreditation from the Ministry of Higher Education in the Sultanate of Oman for the first four Bachelor of Science programmes. GUTech is owned by OES and managed by the Board of Governors, whose members are representatives of the shareholders, of RWTH Aachen University, as well as both the Omani and German Governments.

As a typical reflection of the German-backed university model, all curricula of GUTech's undergraduate programmes are designed entirely by the RWTH academe in Germany. All GUTech programmes were awarded international accreditation status by the German-based Accreditation, Certification and Quality Assurance Institute in 2009. The German Academic Exchange Service (DAAD) is also involved in running the Quality Management System for the university. Brandenburg (2012) points out that none of GUTech's offered programmes is similar to what is being offered at the home campus in Aachen. The degree programmes are contextualised to meet the needs of the domestic labour market and economy. The RWTH Aachen also recruits all faculties, by advertising jobs in German newspapers. The former president of the RWTH was appointed as rector of GUTech, the vice rector was also seconded from RWTH Aachen. Exchange of faculties and students takes place to ensure the high quality of teaching and research (Brandenburg, 2012).

This example reveals that the German academic essence and connection to Germany, the intrinsic features of the German TNE, are very noticeable. Brandenburg (2012) considers the German University of Technology (GUTech) as an example for the political dimension of cooperation in the higher education sector in Oman. Local ambassadors and delegations regularly visit their affiliated institutions in Oman, making the internationalisation of higher education an instrument to promote bi-lateral cooperation. The author believes that the institution played a bridging role between Germany and the Sultanate of Oman, not only in terms of education, but also on the economic and political levels.

7. Potentials of the German TNE in the Gulf Region

It is evident from the previous discussion that German TNE is only represented by one university in the Gulf. This is a very low number when compared to the vast number of US, UK and Australian higher education institutions. German universities exist globally at over 60 different sites in 34 countries, offering 274 undergraduate and postgraduate courses (DAAD and DZHW, 2017, p. 34). Whilst the Gulf Region is the largest importer of HE, the presence of German TNE is relatively limited in the region, considering its high potential and benefits.

Lack of engagement of German TNE in the Gulf region could be attributed to several reasons. The Gulf States, particularly UAE and Qatar, are perceived as a lucrative market for revenue-seeking international education providers such as the USA, UK and Australia. While the UAE offers infrastructure for rent and tax exemption; the Qatar Foundation in Qatar provides full support in terms of prestigious infrastructure and scholarships for its own students. These measures create an attractive environment for any foreign establishment seeking to make a return on investing abroad.

Therefore, the USA, UK and Australian universities are marketing themselves in the Gulf. Dean Hok, co-founder of Edu-Alliance UAE, believes that those countries which have strong presence in the Gulf are promoted in the area by government or semi-government groups. He believes that the investment funding groups in the Gulf know very little about the German education system. Although there are a number of German institutions among the top 500 in the world, most people do not know what they are; therefore, lack of branding of German universities is an issue. A second issue would be the lack of their presence at regional college fairs, meaning that they will not be seen by students, government officials and investors. As an observer, Hok said they are not being properly promoted in the region by the German trade groups and Embassy. Perhaps they do not wish to be promoted.

Lack of marketing could be interpreted by the fact that education is perceived by German universities as a public good, and, therefore, marketing and business should not be part of it. The fact that HE is perceived in Germany as a public good and every national and foreign citizen has the right to free education has been reflected in the nature of the German TNE, which values financial sustainability over financial gain. This has been manifested in the nature of most German partnerships abroad, which are sought-after and were mostly initiated by hosting partners. If German higher education needs to better position itself internationally, some branding and marketing activities are required by the cultural sections of the embassies and DAAD.

Another issue is that most of the Germany's exported education concentrates on engineering and the natural sciences. As per the statistics provided by DAAD and DZHW (2016, p. 89), enrolments concentrated in the fields of engineering constitute 49.5 per cent and mathematics/sciences 16.7 per cent. These subjects are not marketable in the Gulf the way that management and business are mainly offered by the USA, British and Australian colleges. These subjects are encouraged by free zone groups that have attracted the large number of foreign institutions in countries like the UAE. Recently, the UAE Government has realised that the market is over-saturated by business administration and IT programmes and, according to a statement by Hok, have discouraged schools from offering these specific subjects.

Many countries with foreign-backed provisions explicitly do not allow the establishment of branch campuses (notably Egypt, Nigeria and Indonesia). Only the United Arab Emirates and Malaysia host both types of transnational institutions (Lanzendorf, 2008a). Although "IBC rationales span revenue, institutional internationalization and two-way mobility, prestige, and securing a base for research", Garrett et al. (2016, p. 17) see little evidence that IBCs worldwide has achieved these targets, saying, "most IBCs are still reshaping the model, concerned largely with in-country students and seeing little two-way mobility or single-brand enhancement". The authors also see little proof that IBCs could generate surplus and most of the income goes into operational expenses. Therefore, the Gulf States need to be more cautious and selective when attracting IBCs and attempt to diversify the modes of delivery they attract. While Garrett et al. (2016) suggest that IBCs have limited short-term benefits, and that it takes many years for an IBC to become well-established and to judge its impact, German IBC universities are ranked in the top list of the world universities (Kammüller, 2017).

The prevalent model of German TNE, the German-backed provisions, has many advantages from which recipient countries like the Gulf States could benefit. They draw upon the quality of education and expertise of Germany's high-rank institutions in teaching and research, while, when locally established, German-backed universities maintain local ownerships and adhere to the host country's legislation and quality-assurance regulations. The degrees awarded by such establishments are also recognised in Germany. Another benefit is that they help in building local capacity by experiencing a new approach and system of education. Therefore, promoting the TNE model will enable the Gulf States to import curricula, and organisational and administrative know-how and receive support in implementing national education targets, particularly in technical fields, which could contribute to transforming their societies from knowledge-receptors to knowledge-producers.

Another benefit is in intensifying the research aspects of higher education in the Gulf. According to the British Council (2012), about one-third of all the academic research produced globally is carried out through international collaborations. The higher the international research collaboration rate, the higher the impact of the research output. Given that German institutions are heavily research-oriented and considered as one of the research leaders worldwide, German TNE will maximise opportunities for research collaboration in the Gulf region.

Germany, on the other hand, benefits from enhancing its international appeal as a desired partner for study and research, and fulfils its foreign, cultural, development and education policies through “education export”. This will help project Germany’s soft power. Given higher education’s current preoccupation with competitiveness, global branding and rankings, German universities, by venturing into TNE in the Gulf, will enhance their international presence, reputation and brand recognition as collaborative partners. They will also internationalise their knowledge resources, and recruit highly qualified students and junior researchers from abroad who could benefit the education sector by their cultural diversity. Finally, exploring a new market will allow Germany to experiment with new models and organisational forms in a competitive marketplace such as the Gulf Region’s education sector.

8. Conclusion

The German TNE model has little in common with other forms of TNE, the fact of which makes it unique in nature. Compared to other TNE’s forms, the German TNE is publicly subsidised, offers cost- and manpower-intensive courses and emphasises financial sustainability over financial gain. It is evident that German universities should progress their transnational collaborations by approaching new partners and opening new markets to test new models of partnership on an equal footing. The German-backed universities model, which has proved its success, needs to move into a new phase of intensive joint strategic development, exploring new markets in a very promising region like the Gulf.

It is important for German universities, when deciding to enter the market, to demonstrate the value they can add and to rank themselves vis-à-vis other international competitors in the region. The GCC governments are acknowledging the importance of foreign participation in accomplishing their objectives for the education sector and are providing a friendly environment for foreign institutes to establish themselves. Germany has a lot to offer for the development of the higher education sector in the Gulf Region. The quality of its education is one of its major selling points as German-applied higher education has a strong international position and reputation and Germany also has research universities that are ranked among the top universities in the world.

However, Germany, which has already established its footprints in creating a unique brand of TNE, must build awareness of this brand to maintain its uniqueness, and to stand out in a competitive marketplace. German universities need to do more to make themselves known in the region for their high ranking in the international landscape, the quality of combining teaching with research and other values that they can bring to the region, particularly their innovative approaches in applied research and quality of their education in cost-intensive courses, such as the Natural Sciences, Engineering and technical disciplines. These are values that are highly required to fulfil the Gulf States’ vision for moving towards building a knowledge-based society. This is also in line with the German Higher Education policy to increase the establishment of German-backed universities and off-shore campuses; nevertheless, it seems that the first option is more feasible since it carries less financial and organisational risks.

Whether there will be sufficient demand to operate in the region will depend on whether a participating institution can succeed in attracting students, not only from the Gulf region, but the entire Middle Eastern region and beyond, in terms of tuition fees, living costs, the competitiveness of other study destinations and domestic institutions. A techno-economic feasibility study for establishing a German-backed university in a Gulf State would be a recommended topic for future research.

Germany also shows a strong nationally motivated model of foreign-backed (bi-national) universities, which presents a very interesting case for further studies.

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