


## Chapter 2

# A Discussion on Transnationality and Globalness of HEI Internationalization

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### **ABSTRACT**

*The internationalization of higher education institutions (HEIs) involve a set of activities aimed at providing an educational experience in an environment that integrates a global perspective. The internationalization of HEIs incorporates a diverse set of academic and extracurricular activities with emphasis on the development and innovation of curricula, academic/student/faculty exchange programs, technological assistance, intercultural training, international student recruitment, and joint research initiatives. Despite the several studies on the internationalization of HEIs, no single study addresses issues like local responsiveness and global integration. As such, the authors discuss how the internationalization of HEIs has evolved and how Bartlett and Ghoshal's strategies fit in the internationalization path of HEIs.*

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## **INTRODUCTION**

With the globalization, the world witnessed a rapid increase in the level of international trade. International business has increased since the end of World War II, and currently it is known that the economy is arguably more international than ever before and has acquired characteristics of great turbulence, forcing companies to be more attentive and to adapt to more often and unexpected changes (Dicken, 2011). Recently, international education has also been growing steadily.

Internationalization is a very broad theme that has evolved over time, under various prisms, based on well-differentiated theories and different understandings (Moreira, 2009; Ribau, Moreira, & Raposo, 2015, 2018; Ietto-Gillies, 2012). If, over time, internationalization was analyzed from the macro viewpoint for hundreds of years, until the 1960s it was based on a strong conceptual base of the theoretical foundations of multinational corporations. If since the 1960s small and medium-sized enterprises have begun to be the center of attention, it is at the beginning of this century that there is a significant influx of work on the internationalization of higher education and the Higher Education Institutions (HEIs). As referred by Ribau et al. (2015, 2016), the literature on business internationalization is vast, somewhat fragmented and dispersed. Over time, not only the globalization of business activity has evolved, but scholars' interpretations have also changed (Moreira, 2009; Ribau et al., 2015, 2018).

Internationalization represents the development and improvement of institutions skills and competences that seek to exploit their competitive advantages in international markets.

In a time of globalization, international business is gaining ground and it is often heard that companies and HEIs must compete internationally, or else they are likely to fade away and die. But in spite of this, it is important that organizations first know themselves and all their stakeholders, so that subsequently, in accordance with their strengths and weaknesses, they can move on to international grounds and thus be able to act in accordance with their capabilities.

Internationalization involves the deployment of the firms' main strategic added-value activities abroad (Meyer, 2006). However, although some companies do not opt for internationalization, they end up feeling the effects of the internationalization of other companies due to the existing exchange of goods and services worldwide.

In their internationalization process, organizations can opt for multiple operations worldwide. Bartlett and Ghoshal (1989) identified four possible generic strategies at the corporate level, according to global integration and local adaptation: Global;

International; Multi-domestic; and Transnational. This typology has been used extensively to characterize the activities of multinational firms in which each type of strategy is articulated at organizational level with different orientations, configurations and structures, facilitating or inhibiting the production and transfer of knowledge within organizations. If this typology has been used by several authors to discuss international guidelines at business level, the internationalization of HEIs has followed a different path. Thus, the aim of this chapter is to discuss how the internationalization of HEIs has evolved and to discuss how Bartlett and Ghoshal's (1989) strategies fit in the internationalization path of HEIs.

The chapter is composed of six sections. After the introduction, section two covers a literature review on Internationalization of HEIs. Section three discusses the main elements and dimensions of the Bartlett and Ghoshal's (1989) typology. Section five presents the conclusions of the chapter. Finally, section six presents future research directions.

## **INTERNATIONALIZATION OF HIGHER EDUCATION INSTITUTIONS**

The internationalization of HEIs began to expand after World War II with an increase in the number of students completing their courses outside their country of origin (Knight, 2014).

Although universities were not expected to become increasingly internationalized by integrating a global, intercultural or international dimension into their objectives, functions and activities (Scott 2006; Knight 2004), the growing expectation of students in pursuing transnational education led HEI to search for legitimacy, resources and reputation to embrace internationalization (DiMaggio & Powell, 1983).

There are several perspectives used to define the internationalization of HEIs. According to Knight and De Wit (1995), it is a set of activities aimed at providing an educational experience in an environment that integrates a 'global' perspective. The internationalization of HEIs incorporates a diverse set of academic and extracurricular activities with emphasis on the development and innovation of curricula, academic / student / faculty exchange programs, technological assistance, intercultural training, international student recruitment and joint research initiatives (Knight & De Wit, 1995). The IAU (International Association of Universities) (2003) brought them together in three levels of importance: primary, secondary and tertiary.

The primary level encompasses (IUA, 2003):

- The mobility of students;
- The strengthening of international research collaboration.

The secondary level involves (IUA, 2003):

- The mobility of faculty members;
- A international dimension in curriculum;
- International development of projects;
- Join academic programs.

The third level encompasses (IUA, 2003):

- The development of twinning programs;
- The establishment of branch campus;
- Commercial import/export of educational programs;
- Extracurricular activities for international students.

Those three levels support Knight's (2004) perspective of internationalization. As such, a university in search of an internationalization perspective needs to embrace a consensual goal in cultural terms, namely to avoid the mismatch of within and between cultures among the teaching, researching and service activities they provide (Hagen, 2002).

One of the important and highly controversial aspects of HEI internationalization is that cross-border education has gradually shifted from a cooperative model to a partnership-based model, much more commercial and competitive than the cooperative one (Knight, 2014; OECD, 2007), which involves the transfer/movement of students, academics, researchers, knowledge, programs, measures, ideas, curricula, projects, research and jurisdictional services across regional or national boundaries (Knight, 2006, 2014; OECD, 2007).

## **Reasons for the Internationalization of HEIs**

There are several reasons that lead HEI to internationalize: geographical location; linguistic and cultural differences; and the HEI historical path.

Comparing a British university with a Chinese university, Chan and Dimmock (2008) show how the characteristics of different universities influence their internationalization motives: while the British university seeks to gain a reputation

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worldwide, the Chinese university intends to serve its country. The reasons that lead universities to internationalize and the means they use are related to their initial characteristics, their objectives as institutions, and the influence that organizations around them have on them (Seeber et al., 2016).

According to the IUA (2003), the following nine factors lead to the internationalization of HEIs:

1. An increase on the students' international awareness and a deeper involvement of students with global issues. As such, internationalization is expected to help students learn to work in multicultural environments (Altbach & Knight, 2007);
2. The opportunity to improve the curriculum through internationalization (Luijten-Lub, 2007);
3. Cooperation programs involving teachers and HEIs are expected to increase the quality of both teaching and learning (Van der Wende, 2007);
4. Due to the increased costs and complexity associated with research and development (R&D) activities, it is expected that the sharing of resources between HEIs will increase knowledge production capacity, strengthening research. This sharing of resources, whether in the form of knowledge or skills, enables them to discover innovative ways of solving the challenges they face (Knight, 2004);
5. Increasing the prestige and profile of the institution, seeking to raise its legitimacy of national and international stakeholders (Dimmock, 2008; De Wit, 2002; Knight, 2004). This demand for prestige has increased after the implementation of international rankings (Saisana et al., 2011);
6. Opportunity to evaluate and compare performance within the context of good international practices. In order to improve their performance by comparing the performance of other institutions (Knight, 2004);
7. Strengthening international cooperation, as it allows resource sharing and circumventing local resource scarcity (Knight & de Wit, 1995);
8. Increase in the international network of lecturers and researchers (Knight & de Wit, 1995);
9. Increase and diversification of revenue generating capacity. Receiving foreign students creates business and partnership opportunities that generate a greater revenue stream (Knight & de Wit, 1995; Luijten-Lub, 2007).

The reasons that lead to the internationalization of HEIs involve three different perspectives: environmental (Macro); organizational (intermediate); and intra-organizational (Micro).

At macro level, one can refer that environmental motives are related to legitimacy, competition for resources and reputation (Seeber et al., 2016; Suchman, 1995; Bitektine, 2011).

The availability of resources and the level of competition for them vary widely among European countries. Thus, the location of HEIs influences the internationalization strategy due to differences in resource availability (Seeber et al., 2016). The struggle to finance those resources is quite different, when comparing the European continent and the higher education system of the United Kingdom: in the European continent there is a low competition for funds, since they come from governmental funds (more than 60%) and tuition fees are regulated; in contrast, in the United Kingdom the funds provided by the government are between 30 and 40% of the HEIs' budget (Aghion et al., 2008).

Seeber et al. (2016) argue that HEIs within highly competitive resource systems, such as the United Kingdom, adopt an economic-based strategy for their internationalization, which leads them to a global contextual perspective based on a high competition in the search for reputation and prestige (Marginson, 2006; Cantwell & Taylor, 2013). Finally, Seeber et al. (2016) also proposes that HEIs that seek reputation from global ranking systems will likely adopt internationalization strategies seeking prestige.

Seeber et al. (2016) propose three plausible explanations for the internationalization of HEIs at organizational level. The first is based on HEIs' goals. When they are profit oriented, it is plausible that there are basic differences between profit-oriented and non-for-profit HEIs (Teixeira et al., 2014). A private organization whose goal is profit will likely adopt a more economic-based strategy as a reason for its internationalization.

Secondly, we can distinguish between organizations whose purpose is research and development or purely teaching. By focusing their R&D activity, HEIs tend to adopt internationalization techniques that favor these goals and focus less on teaching methods to their students (Seeber et al., 2016).

Thirdly, teaching-based HEIs adopt student-oriented strategies, namely in increasing students' involvement in global issues, internationalization of the curriculum and increasing the quality of teaching and learning.

At intra-organizational level, there are members whose interests are different from each other, such as academics from different disciplines (Becher & Trowler 2001). It is also possible to admit that in teaching-based institutions, students have a greater influence than their teachers. The opposite is true if the institution seeks an economic-based internationalization, in which the influence of managers is more powerful. On the other hand, a greater influence is exerted by the lecturers / researchers in R&D-based HEIs (Seeber et al., 2016).

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The importance of the students is well demonstrated by De Jager and Gbadamosi (2013). They present a set of criteria that should be taken into account in terms of the level of student satisfaction with the quality of HEIs: internationalization; marketing and support; access and accessibility; international students and staff; academic reputation; student focus; academic quality; variety and reach; location and logistics; accommodation and scholarship; sports reputation and facilities; security; and parking (Gbadamosi, 2009).

The relevance of the degree, academic reputation, employment prospects, and quality of teaching are the four most important factors for students in choosing a HEI (Soutar & Turner, 2002).

Lapina, Roga, and Mürsepp (2016) analyzed the determinants in the choice of a HEI and the satisfaction of students with different aspects at academic level. Regarding student satisfaction, they conclude that internationalization, international students and staff, and focus on students are the three aspects that students most appreciate in choosing a higher education institution. Regarding the determinants in choosing an academic institution, they conclude that the four most important are: academic quality, academic reputation; international students and staff; and student focus. In turn, marketing, sporting reputation, parking availability and the suggestion of friends and family are considered the most irrelevant.

## **A Global Perspective on Higher Education Internationalization**

According to De Wit (2002) and Knight (2008), several terms have arisen over time in connection with the internationalization of higher education, which has only begun to be discussed more prominently since the 1980s.

The internationalization of the higher education industry has been one of the strategic priorities of both the academic community and governments, as a result of the economic, political, sociocultural and academic benefits that can result from this process (Craciun, 2005). In this sense, the motivations that lead to the internationalization in this industry are, among others, to obtain market advantages, new knowledge and reputation, to improve the curriculum with international content (Altbach & Knight, 2007).

The globalization process has led to a more integrated and interdependent global economies (Hill, 2000), which has led to an increase in the flow of people, cultures, ideas, values, knowledge and technology to be acquired across borders. However, Knight (2008) indicates that the internationalization of higher education is a process different from globalization, affirming that it is a process of integration of an international, intercultural and global dimension with the purpose, functions (teaching, research and service), and delivery of higher education at institutional and national levels.

Internationalization has been like the summit for success through the development and improvement of internal competencies, which leads companies and HEI to venture in international markets. By geographically extending its activities, competitiveness becomes increasingly complex and compelling, challenging the core activities and forcing institutions/firms to face challenges at broader/global relationship level.

During the last two decades, HEIs international activities have increased significantly, which has contributed to the increase of the intercultural understanding of the academic community. As a result of globalization, the integration of the research area has also resulted in the use of English as the language used by the scientific community (Altbach & Knight, 2007). In order for research to reach an international dimension, some of the following measures have been established: internationally-oriented excellence research centers; incorporation of an international perspective into existing research centers and programs; establishment of partnerships with international institutions; and dissemination and sharing of knowledge; and results of research carried out through international networks (Knight, 1994).

The growth of activities related to the internationalization of Higher Education is based on four different rationales – political, economic, sociocultural and academic – as shown in Table 1. The different groups of rationales are not mutually exclusive and may assume different degrees of importance from country to country (and from region to region), which in turn can vary over time. Currently, the economic bases are considered as the most relevant and dominant in a global perspective in relation to the other three groups. Moreover, within the academy, strategic alliances as well as students' status and profile are becoming increasingly dominant over the others (De Wit, 2002).

In general, and among many other initiatives in the internationalization process of higher education, it is possible to refer the following ones: the creation of international campuses, cross-border collaboration agreements; programs for international students; and the establishment of English courses.

The activities of internationalization of higher education have been developing at a runaway pace across the whole world. For example in the Middle East – in the United Arab Emirates, Saudi Arabia, Israel – there has been a great deal of involvement from American and Polish universities. Vietnam has established partnerships with European universities. Australian universities have partnered in Thailand and Singapore. South Africa, Egypt and Kenya have been the most active in international partnerships in Africa. Europe has had several European programs in order to promote the movement of students and teachers at international level.

It is possible to perceive that the internationalization of higher education can encompass two streams of activity: “internationalization at home” and “internationalization abroad”. The first includes internationalization activities at the university's original campus, from the teaching / learning process, extracurricular

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*Table 1. Main rationales for the internationalization of higher education*

Political rationale	The political rationale is related with foreign policies, national security, technical assistance, peace and mutual understanding, national and regional identity. Although these policies proved to be important, they became dominant in the internationalization process of HEIs. National security has strengthened its power and importance in the 21st century.
Economic rationale	The economic rationale includes growth and competitiveness, demand for national education, labor market and financial incentives. Although this rationale emerged recently, is linked to the current globalization of economies.
Sociocultural rationale	Cultural bases are closely related to the role that universities and their teaching and research processes can play in creating intercultural understanding and competence for students and institutions themselves in their research. The social foundation of this rationale is grounded on the fact that students are present in an international environment.
Academic rationale	The academic rationale refers to the development of international and intercultural dimensions in the process of academic research, teaching and services, broadening the academic horizon, profile and student status, improving teaching quality and fostering international academic standards.

Source: own elaboration from De Wit (2002; 2010)

activities to relationships with local and ethnic groups. The second refers to the activities carried out abroad. It is an approach linked to the concepts of “cross-border education” and “transnational education” (Knight, 2004).

According to Altbach (2002), education may be going through a revolutionary scenario: it is becoming a kind of internationally traded commodity. Education is no longer seen as a set of qualities, attitudes and values required for citizenship and effective participation in modern society – a key contribution to the common good of any society. On the contrary, it is increasingly seen as a commodity to be purchased by a consumer in order to build a skill set to be used in the market or a product to be bought and sold by multinational companies, i.e. academic institutions that have been metamorphosed into service providers of business activities.

In addition, a study of trends and issues related to the student mobility programs shows a number of new types of education delivery, modes of delivery as well as innovative and complex forms of public / private and local / foreign partnerships. New courses and programs are being planned and conducted in response to local conditions and global trends, as well as new qualifications and awards are also being offered. These developments are designed to respond to the increased demand for education at the level of higher education with the aim of providing the human resources capacity to raise the level of knowledge of society. In addition, they also present new challenges for the world of higher education, especially with regard to accreditation and recognition of qualifications (Knight, 2015).

## **Positive and Negative Aspects of Higher Education Internationalization**

The internationalization of higher education brings benefits to the education industry, for example the improvement of academic quality based on the share of existing information. However, this process can also entail risks, depending on the different types of motivations present in the internationalization process at the academic level.

Knight (2007) also attributes some general benefits such as improvement in R&D activities, improvement of personal curricula and improvement of the quality of higher education in general. However, the internationalization of higher education does not only bring advantages and benefits to its stakeholders, directly or indirectly. This process adds risks and also brings harmful effects both to institutions (both home and host), as well as to agents who are internationalized. Thus, Knight (2003) presents some of the risks associated with the process of internationalization of HEI:

- Loss of cultural factors intrinsic to societies (process of academic globalization);
- Loss of communication through local languages (most institutions develop their programs in universal languages such as English, which jeopardizes the preservation and promotion of the national language);
- Loss of personnel with skills;
- Commercialization of education (some institutions may overlap economic interests in relation to academic interests).

Like the benefits, Knight (2007) divides the risks of internationalization of HEIs into major and minor risks. For Knight (2007), both the loss of staff with specific skills as well as the commercial vision of teaching are considered global problems of great importance, since they interfere in future academic practices and knowledge. On the other hand, the loss of cultural identity, which consequently weakens the academic quality of other institutions, is considered a risk related to the internationalization of HEIs, however with less harmful impact than those referred above (Knight, 2007).

Knight (2003; 2007) and Jofin (2009) consider that the mobility of students allows the country of origin to lose its most competent human resources in the most varied areas. In this way, all the investment made in the future projection of specific knowledge and skills is lost at a certain moment to another country, without the destination country having realized, until then, any investment for the qualification acquired by the individual who embarked in the internationalization process.

From another perspective, Knight (2009) points out that more and more countries are investing in large marketing campaigns and not only with a view to attracting

increasingly qualified staff. One of the goals of many students is to develop part of their training or research in another country and return with more skills to the country of origin. Thus, Knight (2009) states that we are witnessing a different paradigm in what represents internationalization in higher education. That is, many students and / or researchers intend to travel to a given country for part of their training, with the possibility of passing through a second country to obtain a second degree, and also through a third or fourth country in order to carry out an internship or even short-term employment, but often with the ambition to return to their country of origin. This situation presents some risks, even at the level of the structure of societies, such as the drop in the birth rate.

## **MAIN ELEMENTS OF BARTLETT AND GHOSHAL'S (1989) TYPOLOGY**

The evolution of the concept of internationalization reached some milestones that were fundamental to its definition, of which the following stand out:

- A shift in focus from the strategic perspective, which migrated from the industry perspective to company perspective (Tallman, 2001);
- The motivation for internationalization has shifted from an exclusive focus on the markets, encompassing skills and knowledge as well (Hedlund, 1993);
- Recognition that creating a global mindset is one of the key ingredients in gaining the intelligence needed to observe, interpret and act in a dynamic world (Gupta & Govindarajan, 2001).

The complexity of international business leads companies to compete in broader industries. Thus, Porter (1986) argues that industries can be characterized as “multi-domestic” or “global”. The multi-domestic industry is presented as one where competition in each country is independent of competition from other countries. A global industry is defined as an industry where the competitive position of a company in a given country is affected by its market position in other countries. In global industries the company needs to globally integrate its activities to benefit from cross-country connections, unlike what happens in multi-domestic industries.

Although there has been a broad set of typologies about the strategic behavior that multinationals can bring to their global operations, based on global integration and local adaptation of the company, Bartlett and Ghoshal (1989) have identified four possible strategies that multinational companies embrace: *International*, *Global*, *Multi-domestic* and *Transnational*.

Each type of strategy is articulated at the organizational level with different orientations, configurations and structures, which can facilitate or jeopardize the production and transfer of knowledge within multinationals.

For Bartlett and Ghoshal (1989), the international strategy often combines its international sales and distribution capacity with localized production. Thus, this model replicates the skills and knowledge that the company has at headquarters through its subsidiaries abroad. The international strategy is the typical model of internationalization implemented by companies with little international market orientation, based on the use of strategies used in the domestic sphere, transposed to the subsidiaries abroad, all with a great control of the headquarters.

The multi-domestic strategy arises with the international development of the company. Multinational companies are firmly committed to their international businesses where they create replicas of the domestic enterprise in many different countries and markets. Some multinationals deliver operations management to local partners to gain competitive advantage in the domestic markets where they are present.

For Bartlett and Ghoshal (1989), Prahalad and Doz (1987) and Porter (1986), multinational subsidiaries that follow multi-domestic strategies are independently managed and the strategic and operational decisions of each business unit are taken in a decentralized manner, adapting quickly and efficiently to various markets.

According to Rezende and Versiani (2010), the multi-domestic strategy offers advantages given that a productive unit exists in each country, this helps to overcome possible barriers to entry, decreases delivery times and increases proximity to customers responding a more effective way to their needs. However, it is worth noting the disadvantage of not taking advantage of economies of scale in production due to the different existing production units.

Instead of opting for international strategy, or reproducing it, as in the implementation of multi-domestic strategies, Bartlett and Ghoshal (1989) defend that some multinationals share their resources from a global perspective, in order to have access to relatively homogeneous markets, with similar product quality and at a lower cost.

These companies with global strategies are easily adaptable and sensitive to changes in the environment and are constantly reorganizing their resources and capabilities to serve markets well beyond the national boundaries. The strategy of global companies consists of delivering high quality products in the markets that guarantee them greater profitability, through a good management of resources and at the lowest possible cost.

According to Martinez and Jarillo (1989), the global strategy is implemented by establishing an international division or product global divisions with a centralization of decisions, in order to meet the global market needs, focusing its production in strategic countries.

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According to Bartlett and Ghoshal (1989), the advantage of this type of strategy lies in the fact that there is centralization of operations and a product standardization, which will be translated into cost efficiency. A disadvantage of such strategies, which assume a relatively homogeneous market, is that firms may not respond adequately to local needs. Furthermore, the costs of transport between the place of production and the place of consumption may be high, together with charges imposed at government level for entering via imports into their markets.

According to Hollensen (2007), tax benefits allow the company to provide a more competitive price in foreign markets or to accumulate increased profits.

Bartlett and Ghoshal (1989) define transnational strategy as being a multidimensional perspective with internal capacities distributed throughout the company. The transnational strategy, by containing elements of global integration common to all locations, allows building up an identity and a strong organizational culture going against national specificities. Transnational strategies seek to articulate the benefits of being both local and global, and so in organizational terms they seek to spread their activity so as to achieve a balanced adaptation of their structures to each market while succeeding globally.

Transnational companies are characterized by thinking locally and acting globally, as they are able to reconcile a world-based orientation with local efficiency, with a global vision but adapting their products to the local markets and creating added value for the consumer. They manage the innovations they capture globally and diffuse them through fast and assertive communication to all subsidiaries. In this way, they can exploit capital gains in adapting to different markets and consumers, increasing their competitiveness and adapting their global activities to each place they are present. It contrasts with a multi-domestic approach that assumes the independent development and implementation of the strategy by the management units within each country. In developing a transnational strategy, the management team should decide which elements should be consistent across markets and which can be adapted to local needs, expectations and competitive dynamics. Such decisions are at the heart of standardization versus customization, but services offer much more flexibility in this regard than physical goods.

### **Integration-Responsiveness Framework**

The typology proposed by Bartlett and Ghoshal (1987, 1989) was based on local responsiveness and global integration, as shown in table 2, where the four strategies mentioned above were identified.

Multinational organizations generally adopt global, local, or hybrid strategies in their operations (Fan, Zhu, & Nyland, 2008; Rao, 2016). Global strategies provide standardization, integration and control of organizational practices. On the other

*Table 2. Integration-responsiveness framework*

Global integration (High)	The <b>global strategy</b> focuses on global integration with very low efforts on local responsiveness, integrating a high level of organizational processes and benefiting from economies of scale and scope as well as from the integrated learning throughout the whole organization.	The <b>transnational strategy</b> combines the benefits of the scale and learning with the benefits of locally adapted products and processes.
	<b>The international strategy</b> stems from both low global integration and local responsiveness. This way, the company does not benefit neither from economies of scale nor from local consumers. This type of strategy is usually deployed by multinational companies with low international experience.	<b>The multi-domestic strategy</b> focuses on local responsiveness, offering locally adapted products in each market. The main advantages stem from products adapted to each market the company serves disregarding potential economies of scale.
Global integration (Low)	(Low)	(High)
	<b>Local responsiveness</b>	

Source: own elaboration from *Bartlett and Ghoshal (1987, 1989)*.

hand, the implementation of local strategies suggests a greater local responsiveness, leading to decentralization, sensitivity and adaptation of the company’s practices to the country of destination. Finally, hybrid models offer a blend of integration and local responsiveness that overlaps with corporate organizational practices in the host country. Some of Fan et al.’s (2016) integration-responsiveness characteristics are shown in Table 3.

In order to achieve both local global integration and responsiveness, Bartlett and Ghoshal (1987, 1989) suggest a combination of organizational capacity, collaborative organizational culture, and a matrix structure that facilitates the exchange of knowledge horizontally within the organization. However, Chen, Chen, and Ku (2012) criticize the transnational strategy, arguing that it is extremely ambitious, creating highly complex intra-organizational processes that create conflicts of interest and generate counterproductive organizational policies. Thus, it can be said that there is little or no consensus in the literature regarding the integration-responsiveness framework. Moreover, there are other reasons for the lack of this consensus; for example, while Kim et al. (2003) emphasize the internal coordination of integration and present modes of functional integration, Devinney et al. (2000) discuss how structural and technological factors are determinant in organizational strategy. In addition, the integration-responsiveness framework does not adequately incorporate the transactional pressures of the organization’s value chain, since different organizations operating in the same industry may follow quite different strategies (Devinney et al., 2000).

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*Table 3. Factors affecting the integration-responsiveness framework*

<b>Factors that affect global integration</b>	<b>Factors that affect the degree of local responsiveness</b>	<b>Hybrid factors that affect both</b>
Standardization	Environment complexity	Resource dependency
Centralization	Business specificity	Control flexibility
HR/employment	Cultural distance	Heterogeneity of executive group
Technology intensity	Intensity of domestic competition	Previous experience
Advertising intensity	Demand heterogeneity	Cost pressure
Economies of scale	Component localization	Role of regional units
Transnationality	Local trade barriers	Exploitation of resources
Information flow	Established network / government support	
Competitors action	Market orientation	
Country specific advantages	Local business infrastructure	
Premium positioning		
Quality reputation		
Extent of global competition		
Formalization		
Required investment		
Distribution		
Risk diversification		
Distinctive resources		
Flow of resources		

Source: Fan et al. (2008, 2011)

As can be concluded, there is a discussion about the integration responsiveness framework, as most of the studies debate whether companies can follow this strict perspective. Moreover, most of the studies address industrial firms – at least a product-based perspective – and very few address the intricacies of service firms (e.g. Rao, 2015).

Another important aspect that needs to be addressed is the fact that Bartlett and Goshal’s (1987, 1989) typologies, though solidly grounded on the integration-responsiveness framework, seem to fail to address the HEIs internationalization typologies that are traditionally based on “internationalization at home” and “internationalization abroad”, also known as “cross-border education” and “transnational education”.

One can claim that “cross-border education” could be closely related to Goshal’s international strategy as it is based on both low integration with international students from foreign HEIs and low local responsiveness.

Bartlett and Goshal’s transnational strategies seek to combine the benefits of scale with adapted products, which may be applied by HEIs that develop specific programs to attract international students. However, one can hardly claim that those programs are adapted for the different students that seek a specific transnational solution.

## **Main Elements of the Transnational and Global Strategies**

There is some discrepancy in the literature as to whether the strategy deployed by firms is a transnational or a global one. According to Yip (1992), there are five levers of transnational strategy that allow determining if a strategy is primarily global or transnational:

- **Participation in the Global Market:** Management chooses countries to market its products / services, not only based on market attractiveness, but considering the potential of each market to contribute to greater global benefits;
- **Global Product Delivery:** The company offers a standard core product (good or service) that requires the least local adaptability. Since a small share of a global market can offer substantial sales potential, the products / services can be standardized to meet the requirements of the narrowest niches;
- **Global Location of Value-Added Supplementary Services:** The value chain is divided across different countries, using a strategy of creating supplementary services in one country (or in a limited number of countries) for global delivery instead of duplicating each activity in different countries;
- **Global Marketing:** Management employs a global marketing approach, although not all marketing mix elements need to be identical. Typically, corporate design is identical (except for language variations) and advertising themes and execution are similar. However, market positioning may vary somewhat in the light of local competitive offers;
- Global competitive movements are integrated across countries. The same competitive moves are made simultaneously in different countries or following a specific sequence. In highly competitive industries, a competitor may be attacked in one country in order to drain the resources it plans to use in another country, or a competitor in one country may be thwarted by a vigorous marketing campaign in a different country.

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Although the use of these transnational strategic levers allows companies to obtain one or more benefits – improvement of product and process quality, greater consumer preference and increased competitive leverage (Lovell, 1999) – there is a lack of studies on global or transnational service companies.

Generically, it is possible to claim that the globalization process has led to the internationalization of business activities, with pervasive social effects. As a result of their globalization process, firms have embarked on internationalization processes embracing international, global, multidomestic and transnational strategies as Bartlett and Ghoshal claim.

However, HEIs are still lagging behind business firms as they have not been able to deploy value-added supplementary services across different countries, or have created product/services at a global scale that are integrated across countries. As a result, one can claim that globalness is still not a clear perspective among HEIs, as they have been able to target some narrow niches served by international EU funded programs.

## **TRANSNATIONAL EDUCATION**

Education has been growing intentionally since the beginning of the last decade (OECD, 2015). To ensure sustainable growth, some HEIs in several emerging and developing countries are promoting their institutions to international students (OECD, 2015).

The strategy of internationalization of higher education has been leveraged by transnational strategies that have gained increasing importance in recent years (Stafford & Taylor, 2016). As referred above, Knight (2003) also sees transnational education as the main dimension of internationalization. For her, transnational education refers to situations in which students, academics, programs and institutions are involved across the borders of national jurisdiction. Depending on who or what crosses the border, transnational education can take the following forms:

- **Mobility of Persons:** A person goes abroad for educational purposes;
- **Program Mobility:** An educational program is implemented abroad;
- **Institutional Mobility:** An institution settles or invests abroad for educational purposes.

The Australian department of science and education (DEST, 2005; p. 6) defines transnational education “as offshore or cross-border education... refers to the delivery and/or assessment of programs/courses by an accredited Australian provider in a country other than Australia, where delivery includes a face-to-face component

.... As distinct from education provided in a purely distance mode, transnational education and training includes a physical presence of instructors offshore, either directly by the Australian provider, or indirectly through a formal agreement with a local institution/organization.” On the other hand, the center for educational research and innovation (OECD, 2004) acknowledges the promotion of transnational education as the main form of internationalization of higher education based on the following three types of mobility: academic mobility, programs mobility and institutional mobility.

In addition, the OECD (2004) promotes transnational education as a trend that becomes economically viable and strengthens ties between countries.

The development of transnational education strategies has been adopted by educational institutions that seek to develop and diversify their internationalization strategies and that want to position themselves differently within a globalized environment (Stafford & Taylor, 2016). However, transnational higher education represents a significant challenge for the leadership and management of institutions, including issues related to motivation, strategy, risk, funding, human resources, as well as important academic issues such as maintaining quality standards in a variety of locations and / or modes of delivery (Stafford & Taylor, 2016).

Transnational educational strategies are widely recognized as complex, high-risk operations. Programs are developed in one country and delivered in others, education is usually delivered by the partners rather than by the staff of the institution granting the qualification. Local conditions – including delivery methods and student expectations –, the political context and the framework are the main obstacles faced in implementing these strategies (Taylor, 2010).

To ensure that students, staff, study programs and curricula are in tune with the needs of an economy, an increasingly globalized workforce is required which leads to higher expenditures.

The literature that deals with the problems that transnational education entails, in particular questions related to pedagogy and quality, began to expand only in the 2000s (UNESCO-CEPES, 2000; McBurnie & Ziguras, 2001; Huang, 2007; British Council, 2013). However, while institutions and quality assurance agencies have paid particular attention to the governance and management of transnational education programs in recent years, empirical research, especially at the micro level of each institution, remains scarce.

Although there is some risk related to this issue, there are those who study the motivations of the institutions that decide to implement this type of strategies.

According to Healey (2015), the impulses and motivations to adopt and offer transactional education can be summarized as follows:

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- Development of an international brand (Wilkins & Huisman, 2012);
- Expansion of operational capacity (Verbik & Merkley, 2006);
- Incentives from governments to support exports and contribute to the economy;
- To ensure healthy growth of the global higher education industry (European Parliamentary Research Service (2013), by focusing on some cross-border markets without managing several global markets.

Transnational strategies in education can also contribute to the socio-economic development of other countries (Stafford & Taylor, 2016), which is good for institutional recognition.

Students also find advantages in this type of education. With the relatively high cost that an overseas education entails – tuition, housing, subsistence, travel – studying through a transnational education partnership has become a popular option for many students.

In transnational education, students are located in a country other than the country in which the institution is based. Transnational education can take many forms, including distance education, franchise programs, collaborative ventures and international branch campuses (Wilkins & Huisman, 2012; Healey, 2015).

## **Transnational Education Strategies**

Healey (2015) examined key issues that HEIs should consider when defining the transnational education strategy. He has selected the following topics in order to understand the underlying requirements of transnational education and what strategies should be structured for the development of an international partnership: scope, composition, process, structure, function and results.

Table 4 serves to evaluate the alternative options, to identify which one is most advantageous and to construct the most appropriate strategy.

In order to choose the best form of transnational education and to define a consolidated transnational strategy between the partners it is necessary to recognize the correct dimensions for the definition of an appropriate strategy.

Another key problem is to recognize the right scope and extent of the market-oriented strategy, based on the transnational market conditions that partnerships have implemented to support the development of their transnational education strategies (Shams, 2016).

Based on these characteristics, it is possible to define consolidated transnational strategies, where the obligations and results of the strategy are, from the outset, measurable and identifiable.

*Table 4. Main considerations in the development of a transnational education strategy*

Composition	Composition refers to the types of partnership, i.e., the number and the diversity of associated partners (Moore & Koontz, 2003);
Structure	The structure is related to the type of the partnership agreement, the extent of its formality and the type of legally binding contract (McQuaid, 2000);
Scope	The scope of application denotes a variety of activities formalized by the partnership and the contract period (Margerum, 2008);
Role	The role includes the vision and objectives of the partnership (Frank & Smith, 2000);
Process	The process refers to the course of actions through which the vision will be reached, including the responsibility and the autonomy of partners involved in the partnership (Waddock, 1991);
Result	The result might involve product or process orientation (Long & Arnold, 1995), or both. For example, in transnational education partnerships some results are focused on mutual advantages both for the issuing and the receiving institution, but may also involve the agent that promotes or commercializes education services.

Source: Shams (2016)

## **Sustainability and Transnational Education**

Sustainability has been recently referred and studied as an environmental, socioeconomic, political, industrial, agricultural and organizational problem, as a result of the frantic development of societies (Shams, 2016).

According to the *Network for Business Sustainability* (2012), institution-level sustainability consists of knowing how to manage the triple bottom line, i.e., the financial, social and environmental risks, obligations and opportunities of institutions. These three impacts are, in many times, referred as people, planet and profits.

In general, since strategies and transnational education are operated in distinct geographical markets that are highly profit-oriented, it is necessary to analyze what supports the long term business viability of this type of education.

The literature about sustainability in different industries is very complete and offers an initial vision to conceptualize the sustainability principles to design transnational education strategies based on the specific market conditions.

Since sustainability is one of the most important long-term success factors of business and HEIs strategies (Kuosmanen & Kuosmanen, 2009), it is imperative to create an initial source of strategic sustainability for the institutions that apply transnational education. As such, Table 5 presents some factors that may be considered to measure organizations' sustainability. Based on the conditions of transnational market, higher education institutions must consider specific sustainability indicators to incorporate in transnational education strategies.

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*Table 5. Sustainability driving and mediating factors for transnational education strategies*

<b>Sustainability Driving Indicators</b>	<b>Sustainability Mediating Indicators</b>
Predetermined vision, mission, values and culture;	Overall performance, profitability, survival and growth;
Business costs and cost reduction;	Minimized business costs;
Business risks and risk reduction;	Minimized business risks;
Transcultural understanding and cooperation;	Involvement in the local community;
Reinforcement of image, reputation and brand promotion, communication and awareness;	Employees retention;
Overall performance, profitability, survival and growth;	Reinforced image, reputation, brand promotion, communication and awareness;
Community involvement;	Proximity to power;
Job creation;	Enhanced recycling and reuse capacity.

Source: adapted from Shams (2016).

These indicators are useful to understand the relevance of a certain indicator as well as to acknowledge an exact transnational condition (Shams, 2016).

It is imperative that HEIs deploy a sustainable transnational education strategy taking into account teaching and R&D taking into account the potential intercultural understanding of the whole academic community. Sustainability driving factors are important in designing internationally-oriented academic mobility involving students, academics and research staff, specific mobility programs and institutional mobility to tune up the interest of all parties involved.

In order to develop sustainability mediating indicators it would be important that HEIs deploy (and communicate) their strategies to gain reputation of an transnational credible HEI, capable of attracting high-level students and academics in order to deploy internationally-oriented excellence academic programs and research centers and be able to deploy internationally-oriented partnerships.

To reach this sustainable transnational education strategy it is mandatory HEIs invest in their international and national image and to develop their new communication in order to all the stakeholders understand those HEIs are positioned as transnational education players, committed to competing in international markets. To sustain this international strategy and stand out as a credible partner the political rationale needs to be shifted to the development of an internationally identity in which socio-economic and intercultural perspectives are grounded in international students, academics and researchers, tuned to compete at a global scale for students and staff.

## **CONCLUSION**

Internationalization has been gaining importance among organizations, as a result of the globalization process, the technological evolution and the search for new markets. However, this is a sensitive topic, since there are many different ways to internationalize and a countless number of variables that influence international entry mode decisions and international strategies to be adopted.

A first conclusion is related to the fact that the literature about HEI internationalization has used a nomenclature that does not fit with the one usually used in the typology that characterizes the business internationalization strategies, namely the one from Bartlett and Ghoshal (1989).

One possible conclusion is that some of “internationalization at home” and “internationalization abroad” strategies, that correspond to “cross-border education” and “transnational education”, are still anchored to the international strategy from Bartlett and Ghoshal (1989). Even when there are international partnerships, a large percentage of the partners seek to exert local responsiveness but rarely can implement a global integration.

In fact, although there are some universities with international campuses in many countries, like some English universities in China, these examples are closer to a multi-domestic perspective than to a global or transnational perspective.

A clear straightforward conclusion is that using terms as global, international or transnational education strategies cannot be used without a close scrutiny, as their meanings in business arena differ from the meaning normally used in higher education internationalization.

Clearly, a transnational strategy has advantages, disadvantages and assumptions that need to be respected, like all the other strategies. For example, the control is difficult to manage, especially because the implementation of a transnational strategy requires an extensive decentralization of decisions to subsidiaries, in order to obey to the requirements of local responsiveness. This does not happen in institutions that follow global strategies where a strong global integration and the exploitation of synergies happen, both through economies of scale and partnerships. This kind of strategies, although may be easily designed, e.g. exploiting curricula homogeneity, they are difficult to implement because cultures and educational and socioeconomic systems are different across countries.

If the concepts of global and transnational strategies are to be realistically applied to HEIs, it is necessary to consider that among industrial firms products are easily transferred abroad, whereas service-based HEIs are fixed and the mobility is the

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students/academics/researchers responsibility. As such, only large internationally-oriented universities have managed to deploy campuses abroad. Also, the organization responsiveness is crucial in transnational strategies in order to face the constraints of the educational market, since the offer has to fit the local demand, which is a very important factor in closer and more protectionist markets.

Strategic alliances also represent a pillar in the success of transnational strategies since this is the only way the organization can acquire the necessary knowledge to implement and sustain the strategy.

Clearly, the particularity of education and HEIs conditions the applicability of the “transnational” term to HEI internationalization. As mentioned above, the transnationality comes from a strong local responsiveness and a strong local integration. However, in the implementation of transnational strategies in higher education, the transnational term has been used to refer learning and teaching processes of internationalization abroad as opposed to cross-border education. Clearly, the meanings are different when comparing Bartlett and Ghoshal’s (1989) typologies and the typologies commonly used in higher education internationalization (Knight, 2004).

If the typology proposed by Bartlett and Ghoshal (1989) has been criticized as being idealistic and impractical, especially because of all the conditions of the external context that multinational companies come across, it is possible to affirm that it is conceptually a very well-developed idea, but lacks easiness of implementation and empirical evidence in the internationalization of HEIs.

## **FUTURE RESEARCH DIRECTION**

As higher education internationalization is a specific case of service internationalization, in which not only specificities are important but also certain typologies have been extensively used but with clear specific meanings it would be advisable to analyze how certain HEIs deploy their strategies involving different stakeholders comparing: e.g. how national and foreign students understand the transnationality of HEIs internationalization, how academic and research staff from internationalized HEIs understand the transnationality of the international programs the higher education is involved with.

Future research could also involve the study of the results of the partners’ institutions participating in the international programs they are involved with.

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If brand, image and reputation are at stake in the internationalization of HEIs, not only this needs to be understood among students, academics and research staff, but also it is mandatory to understand how job creation affect, if at all, those students involved in international/transnational programs *vis-à-vis* with those students who were not.

Another important research stream that deserves to be explored is the main motivation of HEIs internationalization. Is it really “education” they are looking for or is it “business” instead?

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## **KEY TERMS AND DEFINITIONS**

**Cross-Border Education:** It involves the internationalization of higher education with at the university's original campus, from the teaching/learning process, extracurricular activities to relationships with local and ethnic groups. It is also considered as "internationalization at home."

**Transnational Education:** It is related to internationalization of higher education activities that involves mobility of academics, students, programs, and institutions across borders of national jurisdiction. It is related to "internationalization abroad."

**Transnational Strategy:** It is an international business structure where the company's business activities are coordinated via cooperation and interdependence between its headquarters, operational divisions, and internationally located subsidiaries. Transnational companies are characterized by thinking locally and acting globally, as they are able to reconcile the centralization benefits provided by a global, world-based orientation with local responsiveness.