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Building a robust international strategy for the business school of the future

International Student Mobility & TNE Symposium, Chartered Association of Business Schools
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SMALL BUSINESS CHARTER
PRME CHAMPIONS Principles for Responsible Management Education

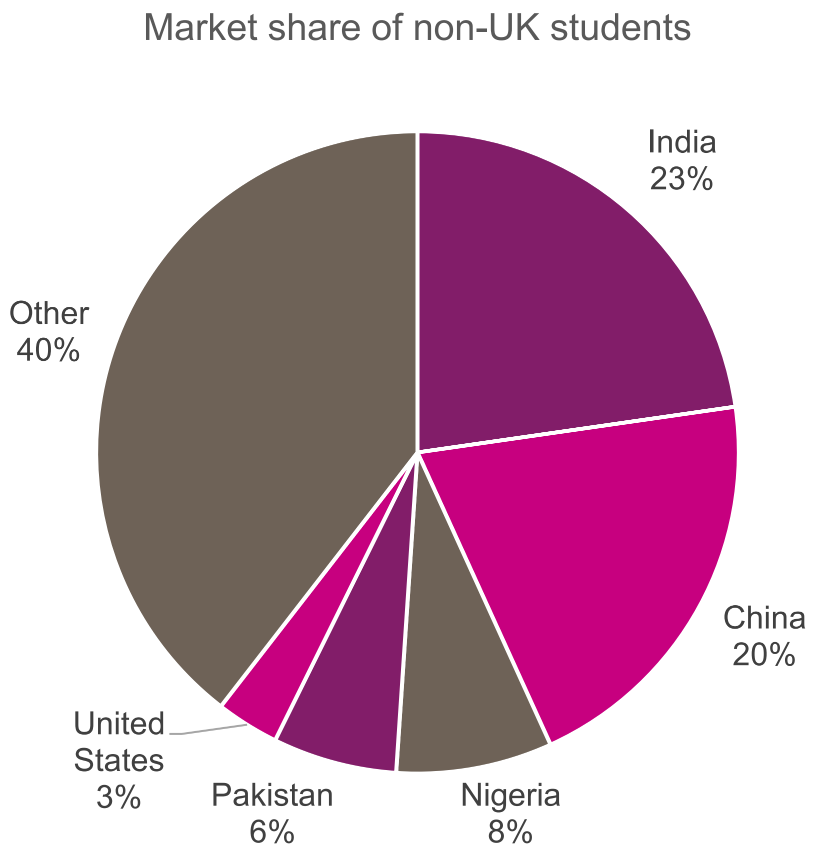
Key trends

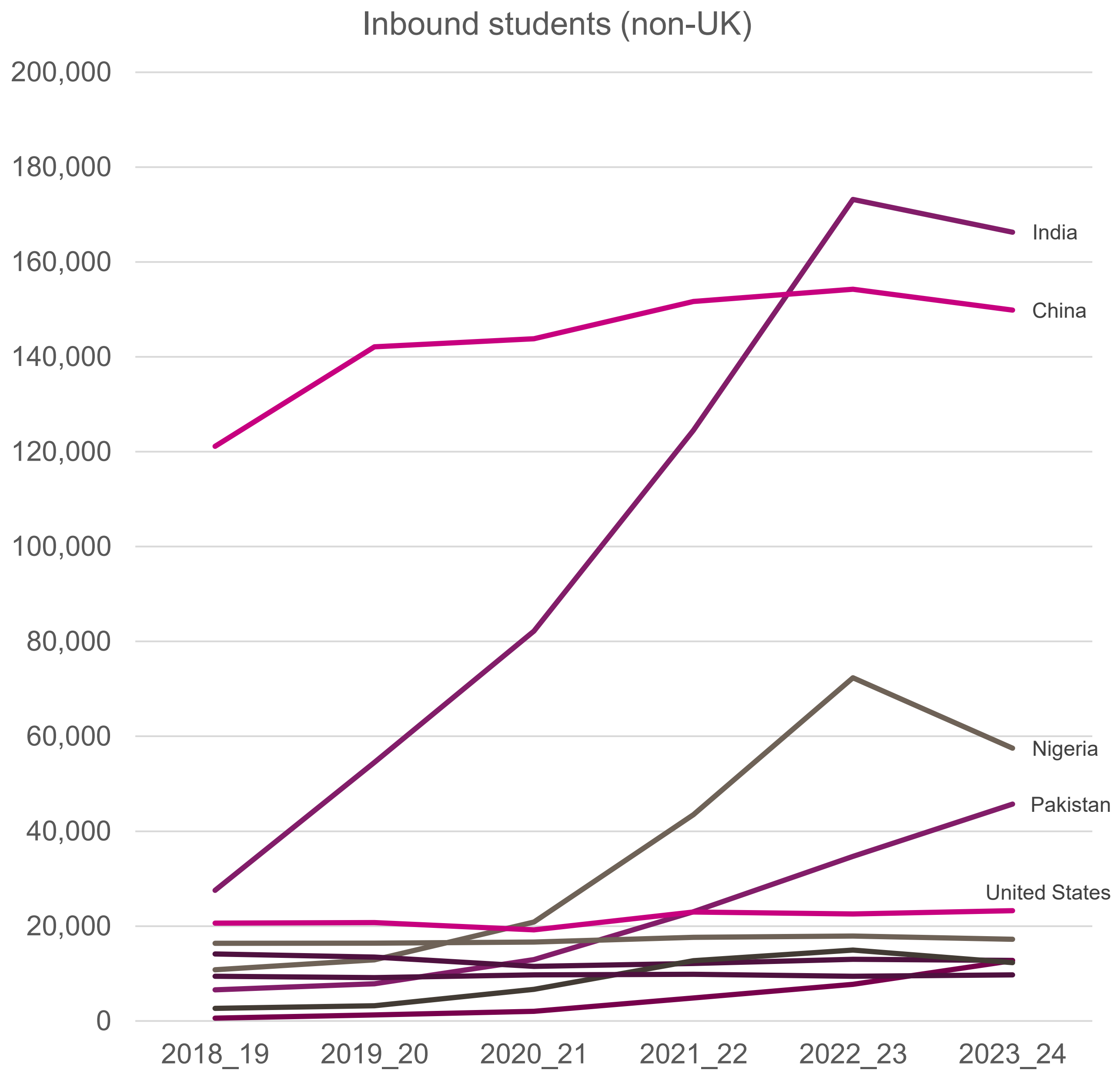
- Growing competition amongst traditional (e.g., UK, Canada, Australia, Germany, France) and non-traditional (e.g., Russia, China, Turkey) destination countries of international students

  Example: China is hosting more than 200k international students. Recent announcements by the Chinese government to attract international students through an ambitious scholarship programme.

- Acceleration of capacity building in traditional sending/source countries of international students
- Reputation, rankings, and employment prospects continue to be very influential for international students
- Geopolitical developments impact the traditional international student mobility flows
- Growing importance of impact (e.g., UN SDGs), equitable partnerships

Inbound students





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Analysis of Key Sending Countries

Country of Domicile	2018/19	2019/20	2020/21	2021/22	2022/23	5-Year Growth
India	54,530	82,200	124,520	173,190	166,310	205%
China	142,140	143,825	151,700	154,260	149,885	5%
Nigeria	12,865	20,865	43,520	72,355	57,505	347%
Pakistan	7,825	12,970	23,050	34,690	45,720	484%
United States	20,725	19,210	22,980	22,540	23,250	12%
Hong Kong (SAR)	16,380	16,660	17,605	17,905	17,250	5%
Malaysia	13,495	11,510	12,130	13,005	12,760	-5%
Nepal	1,270	2,050	4,855	7,720	12,715	901%
Bangladesh	3,215	6,665	12,700	14,945	12,285	282%
Ireland	9,140	9,740	9,840	9,410	9,690	6%

Heavy reliance on certain countries

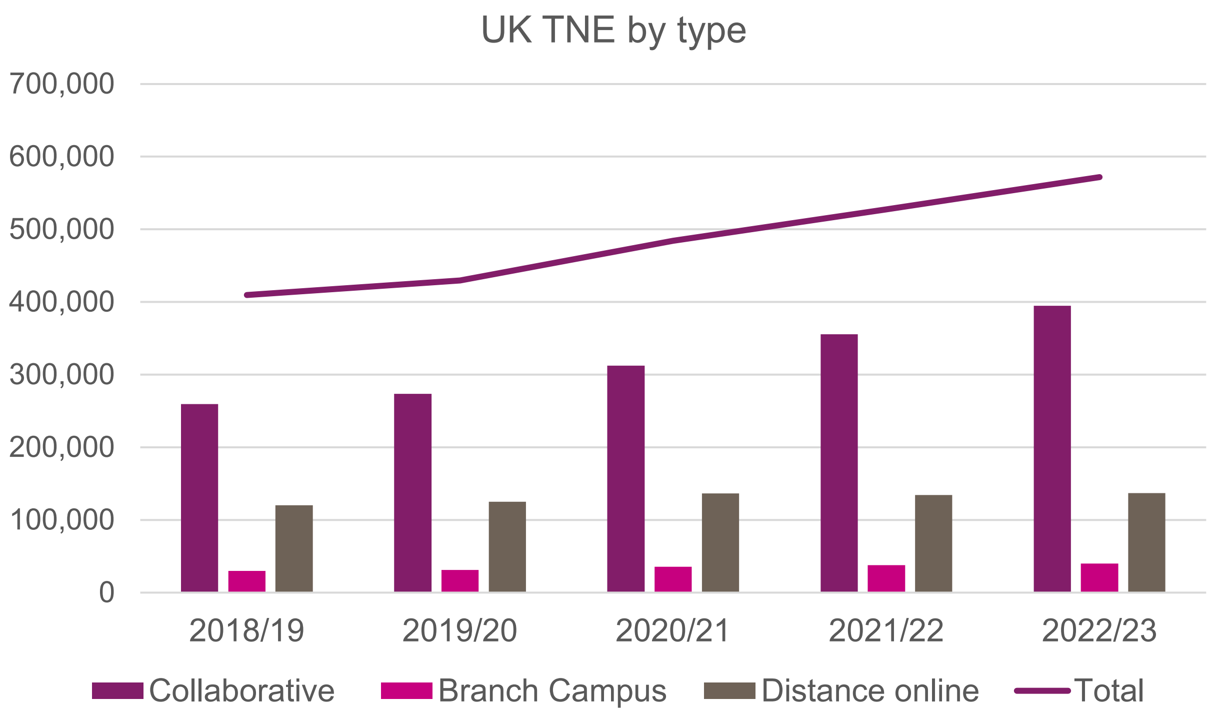
- 51% of all inbound international students in the UK comes from **three countries India, China, and Nigeria**
- 10 countries account for 69% of all international students in the UK.

Sharp EU Decline

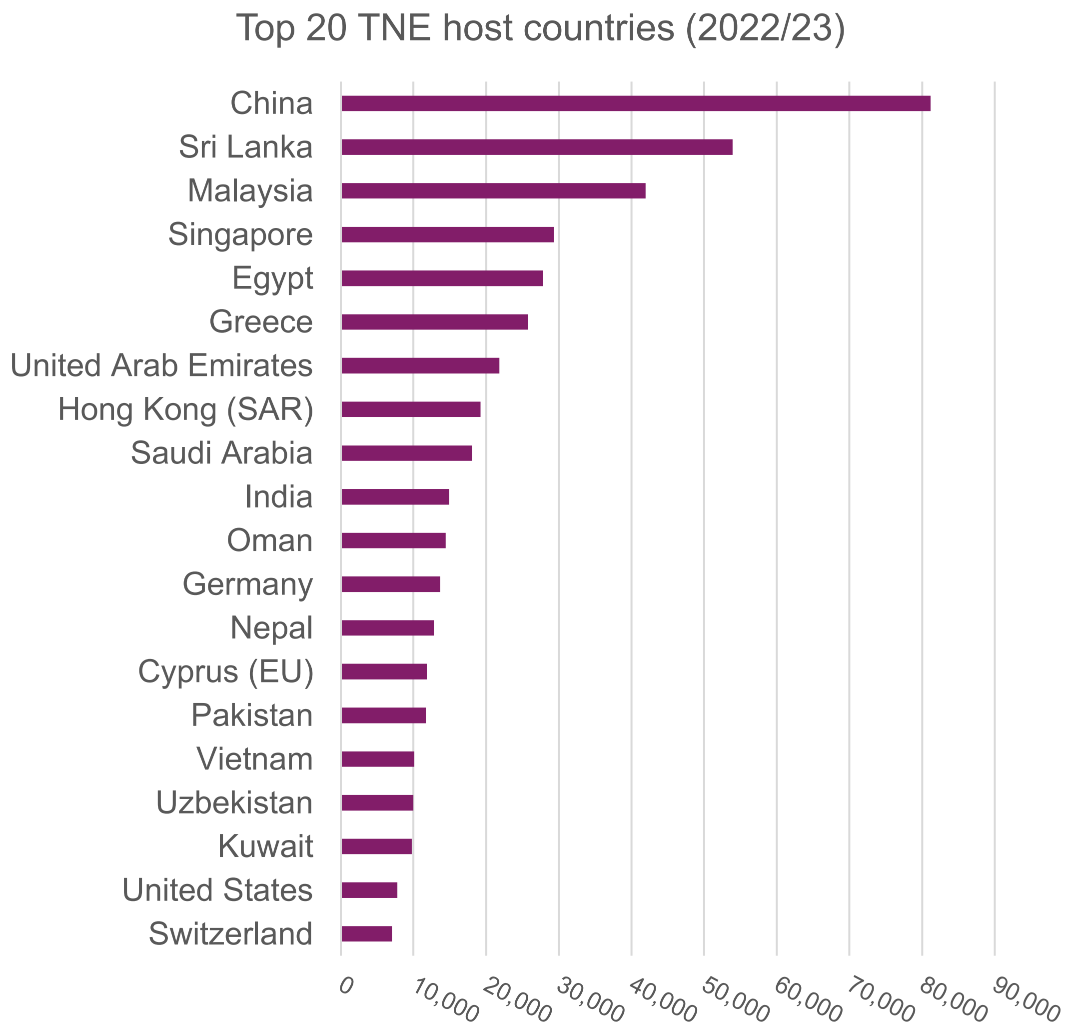
- Italy (-51%), Germany (-45%), France (-38%), and Spain (-37%).

TNE - Overview

The majority of UK TNE (~70%) is in the form of collaborative provision



20 countries account for 77% of all UK TNE provision



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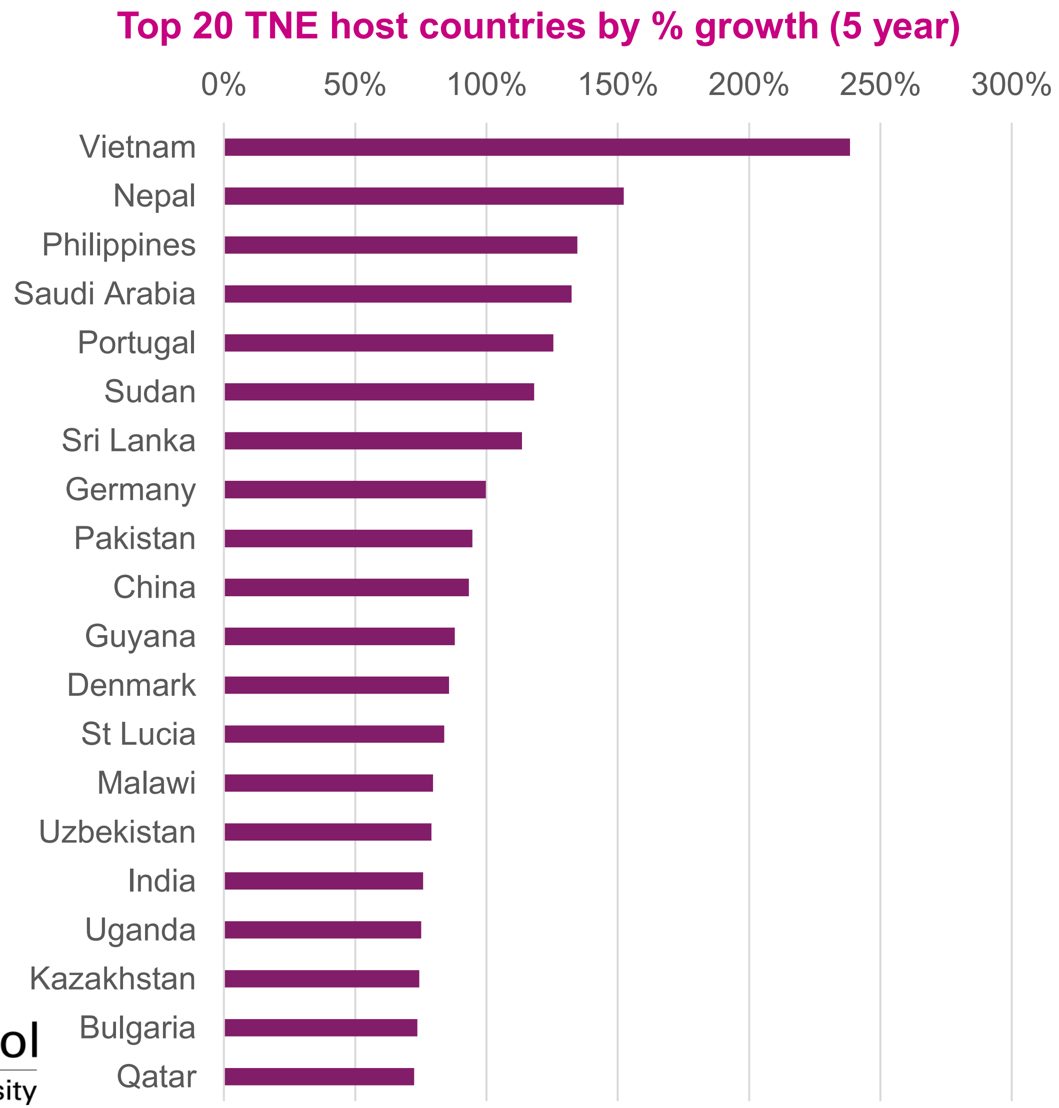
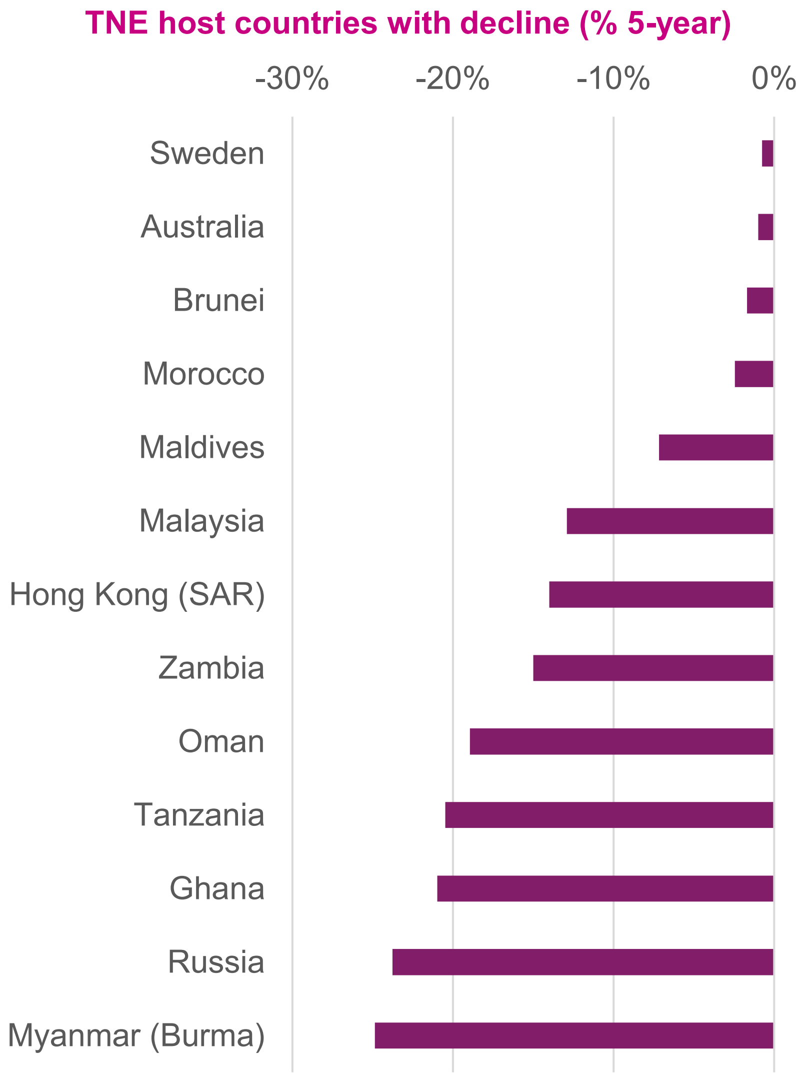
TNE growth trends





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TNE vs Inbound mobility

- In 183 countries with appropriate data (>100 students), the correlation between TNE and Inbound mobility was as follows:
  - 99 countries had positive correlation – implies that both markets move in the same direction.
    - 59 countries had strong (>0.5) positive correlation
  - 82 countries had negative correlation – implies that inbound mobility markets moves in the opposite direction of TNE market
    - 46 countries had strong (<-0.5) negative correlation

Market Categorisation & Strategic Implications

Country of Domicile	Correlation (2018/2023)	Inbound (2022/23)	TNE (2022/23)	Combined	Market categorisation
China	0.889	154,260	81,150	235,410	Inbound-dominant
India	0.940	173,190	14,890	188,080	Inbound-dominant
Nigeria	0.855	72,355	6,115	78,470	Inbound-dominant
Sri Lanka	0.946	7,600	53,910	61,510	TNE-dominant
Malaysia	0.065	13,005	41,940	54,945	TNE-dominant
Pakistan	0.988	34,690	11,715	46,405	Inbound-dominant
Hong Kong (SAR)	-0.796	17,905	19,215	37,120	Balanced
Singapore	-0.509	6,235	29,290	35,525	TNE-dominant
Egypt	0.913	3,560	27,830	31,390	TNE-dominant
Greece	-0.326	5,455	25,775	31,230	TNE-dominant
United States	0.224	22,540	7,780	30,320	Inbound-dominant
United Arab Emirates	0.902	8,350	21,825	30,175	TNE-dominant
Saudi Arabia	0.914	9,045	18,025	27,070	TNE-dominant
Germany	-0.104	8,240	13,660	21,900	TNE-dominant
Nepal	0.930	7,720	12,815	20,535	TNE-dominant
Bangladesh	0.673	14,945	2,125	17,070	Inbound-dominant
Oman	0.173	2,285	14,445	16,730	TNE-dominant
Cyprus (EU)	-0.649	4,870	11,820	16,690	TNE-dominant
Ireland	0.633	9,410	6,855	16,265	Balanced
Kuwait	0.967	6,400	9,740	16,140	TNE-dominant

Market categorisation criteria:

- **Inbound-dominant:** inbound headcount ≥ 1.5 × TNE headcount
- **TNE-dominant**: TNE headcount ≥ 1.5 × inbound headcount
- **Balanced:** neither mode exceeds the other by 50 % (ratio 0.67-1.5)

Poll

Menti.com – use code: **3832 2646**

Poll Results

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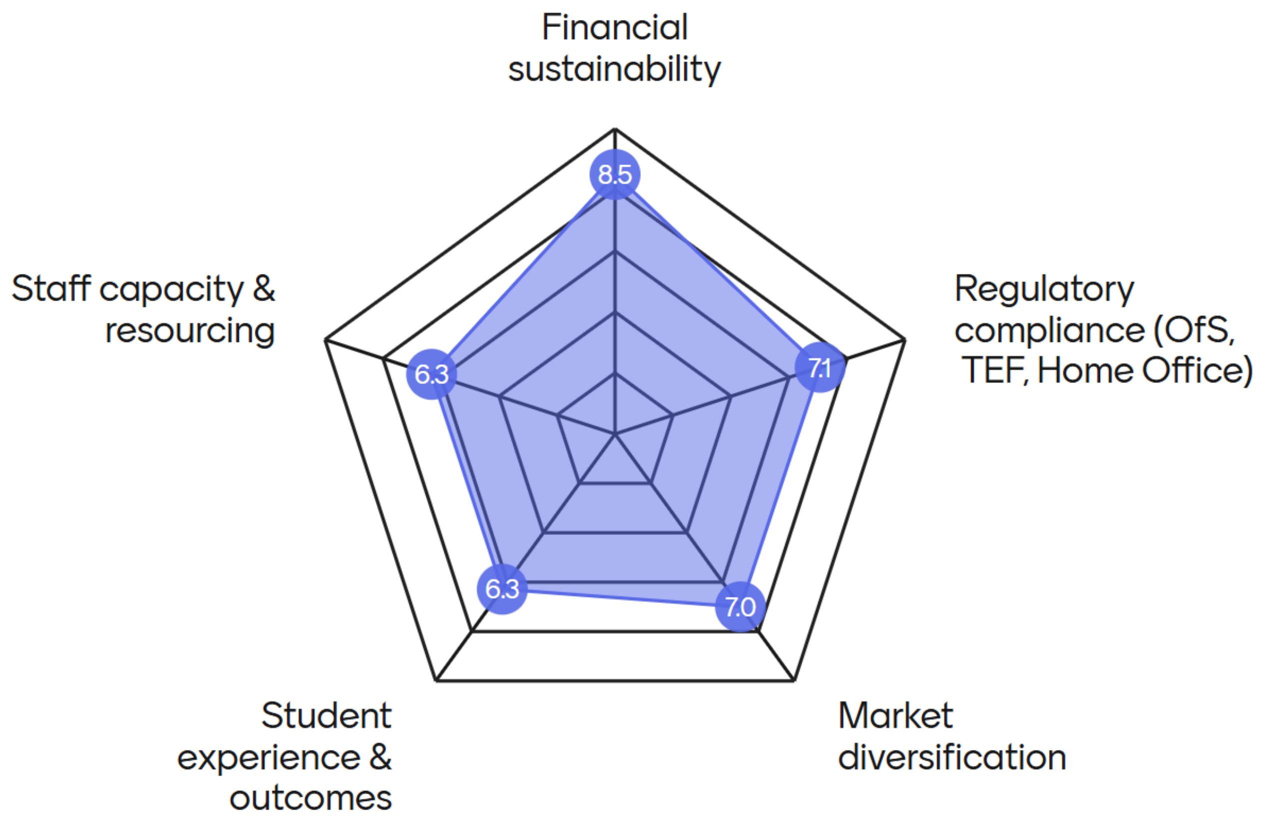
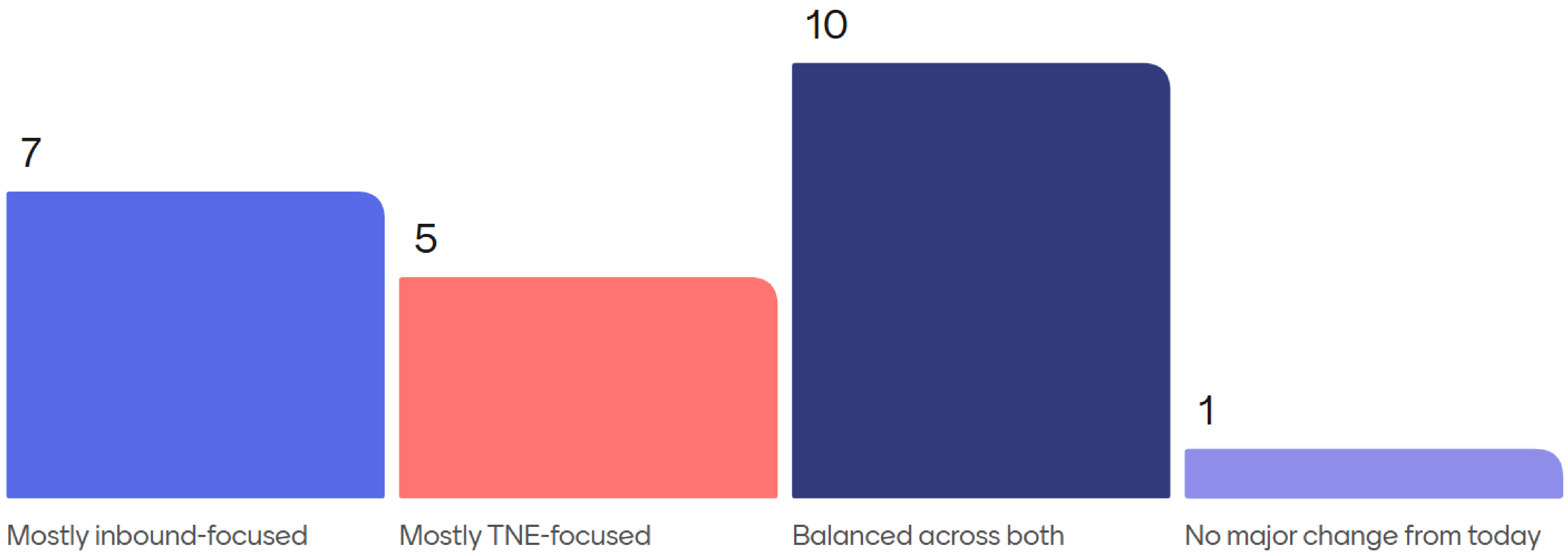
To what extent is each of the following shaping your international strategy right now?

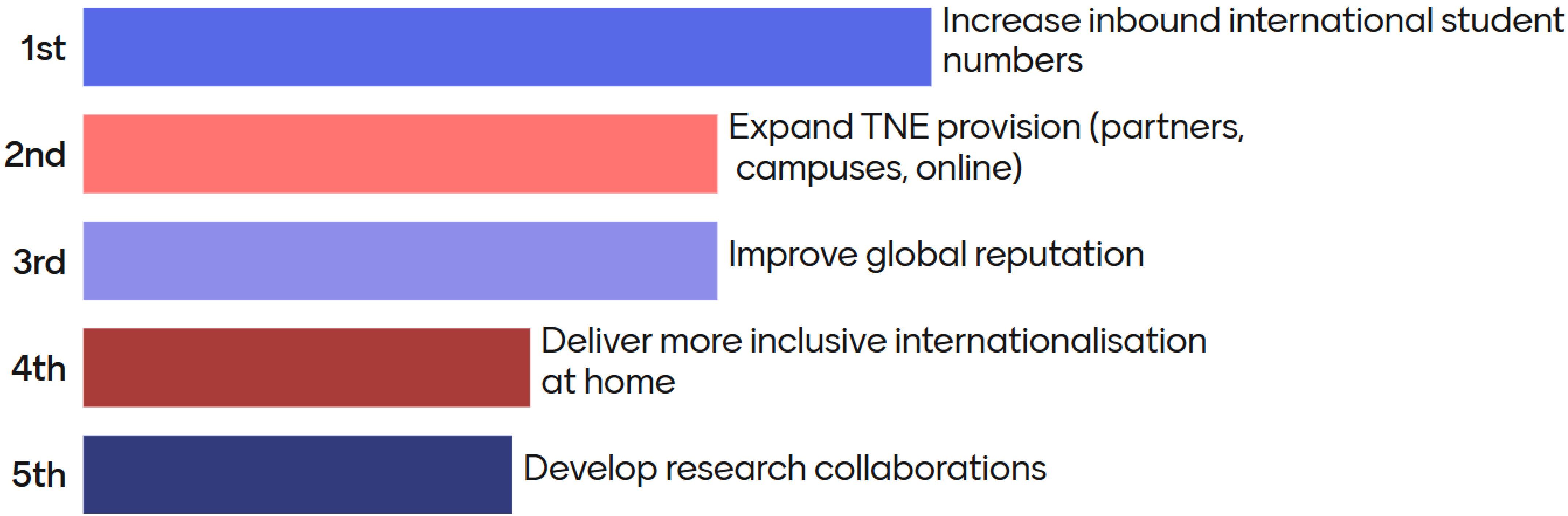
(0 = Not influencing at all, 10 = Major influence)



Over the next 5 years, do you expect your school's international activity to be...

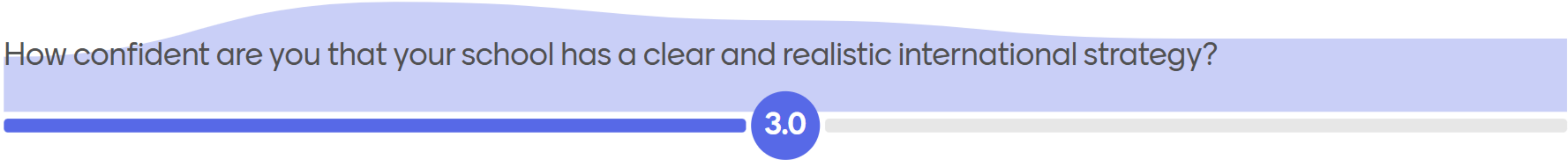


Rank your institution's **main international growth priorities** over the next 2 years?



Confidence about clearly articulated and realistic international strategy

How confident are you that your school has a clear and realistic international strategy?

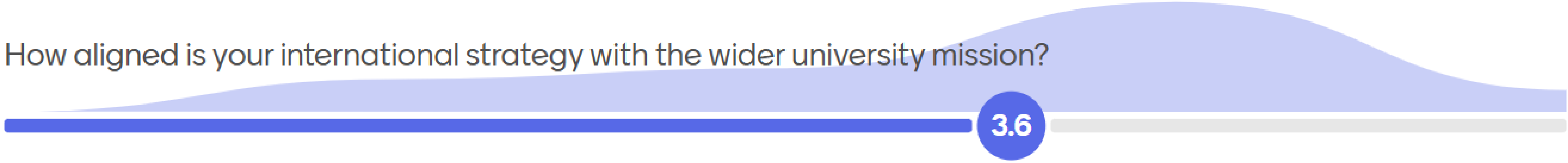


Not at all confident

Very confident

Alignment of international strategy with university mission

How aligned is your international strategy with the wider university mission?

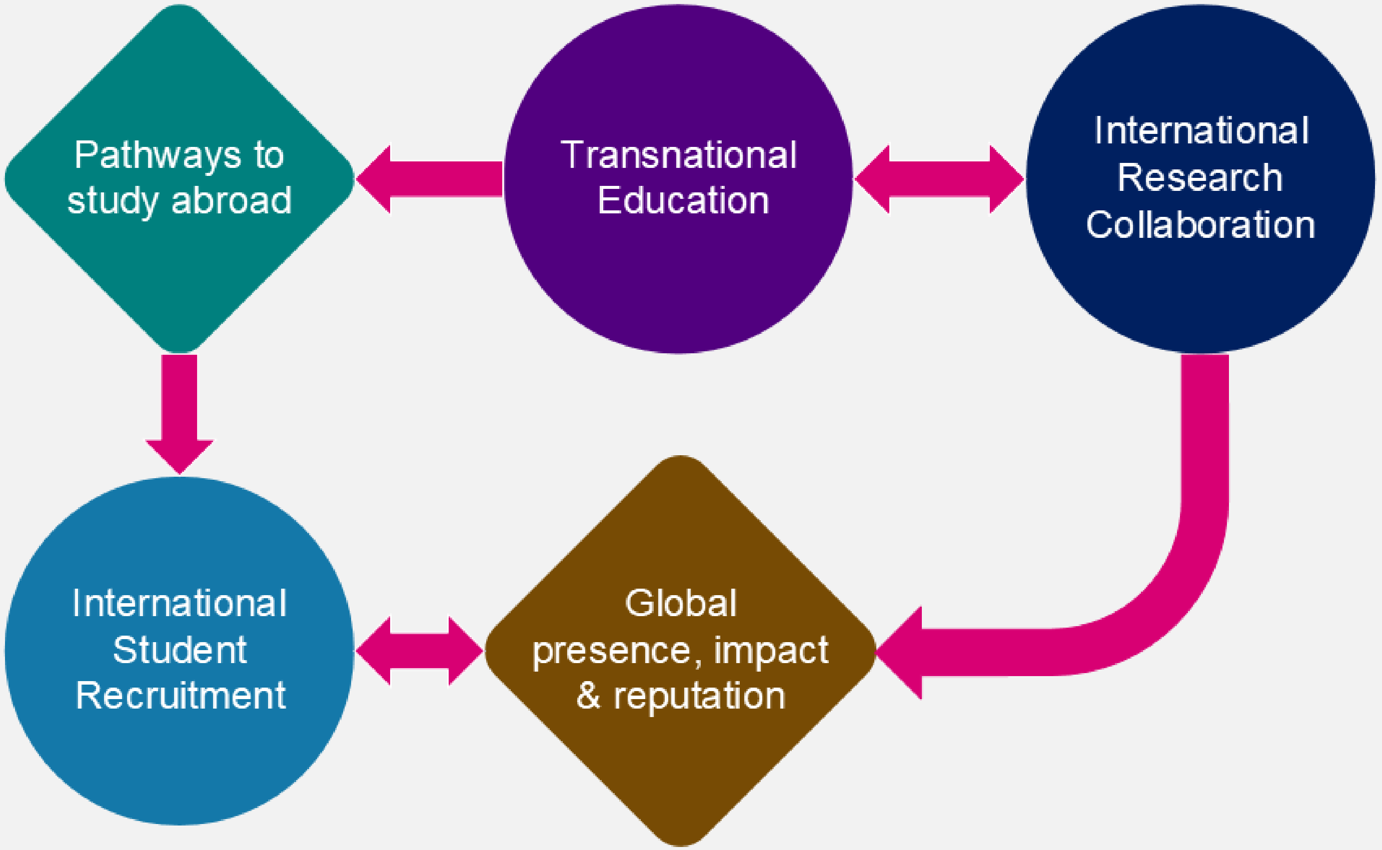


Completely disconnected

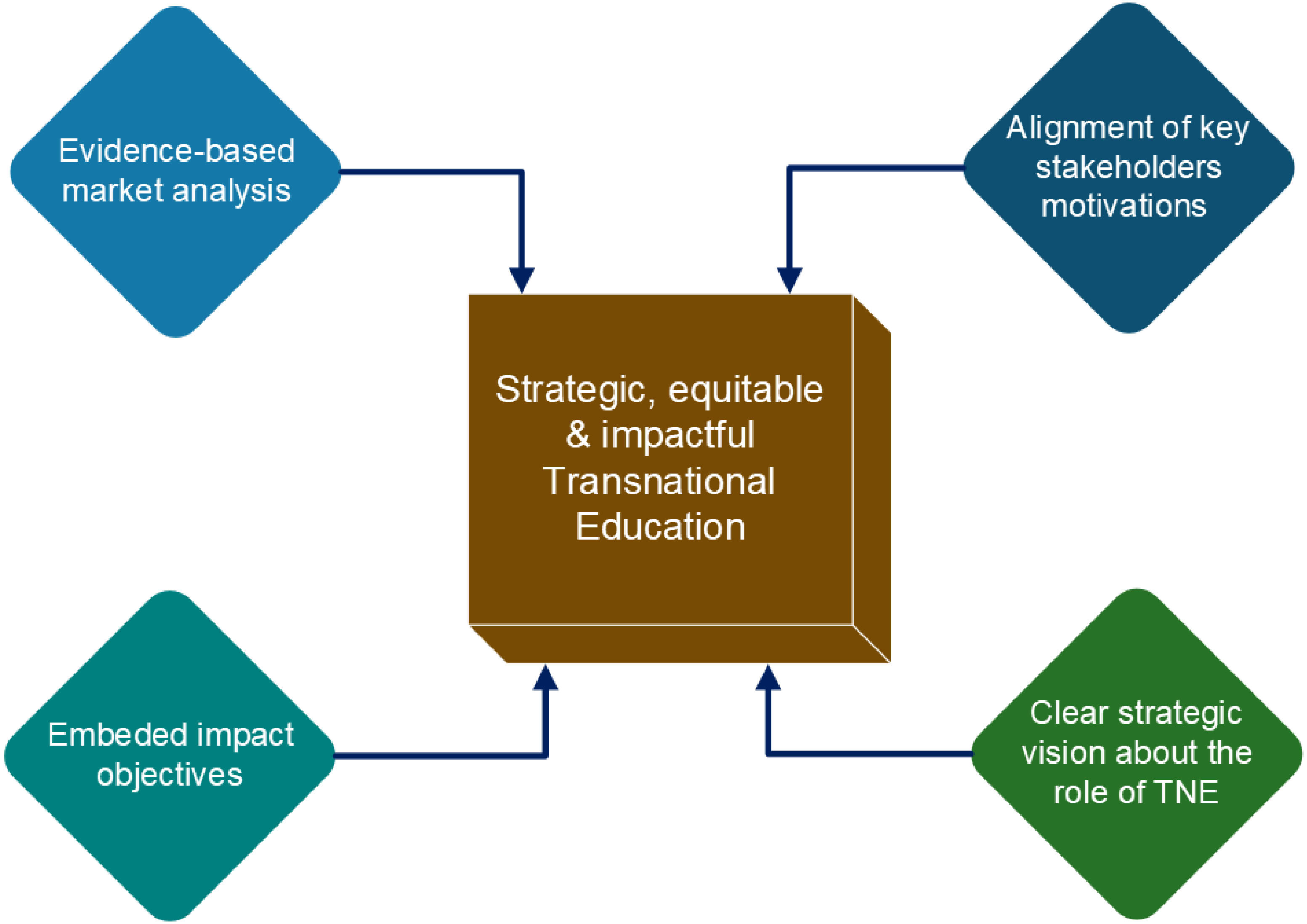
Fully aligned

Useful Strategy Formulation Tools

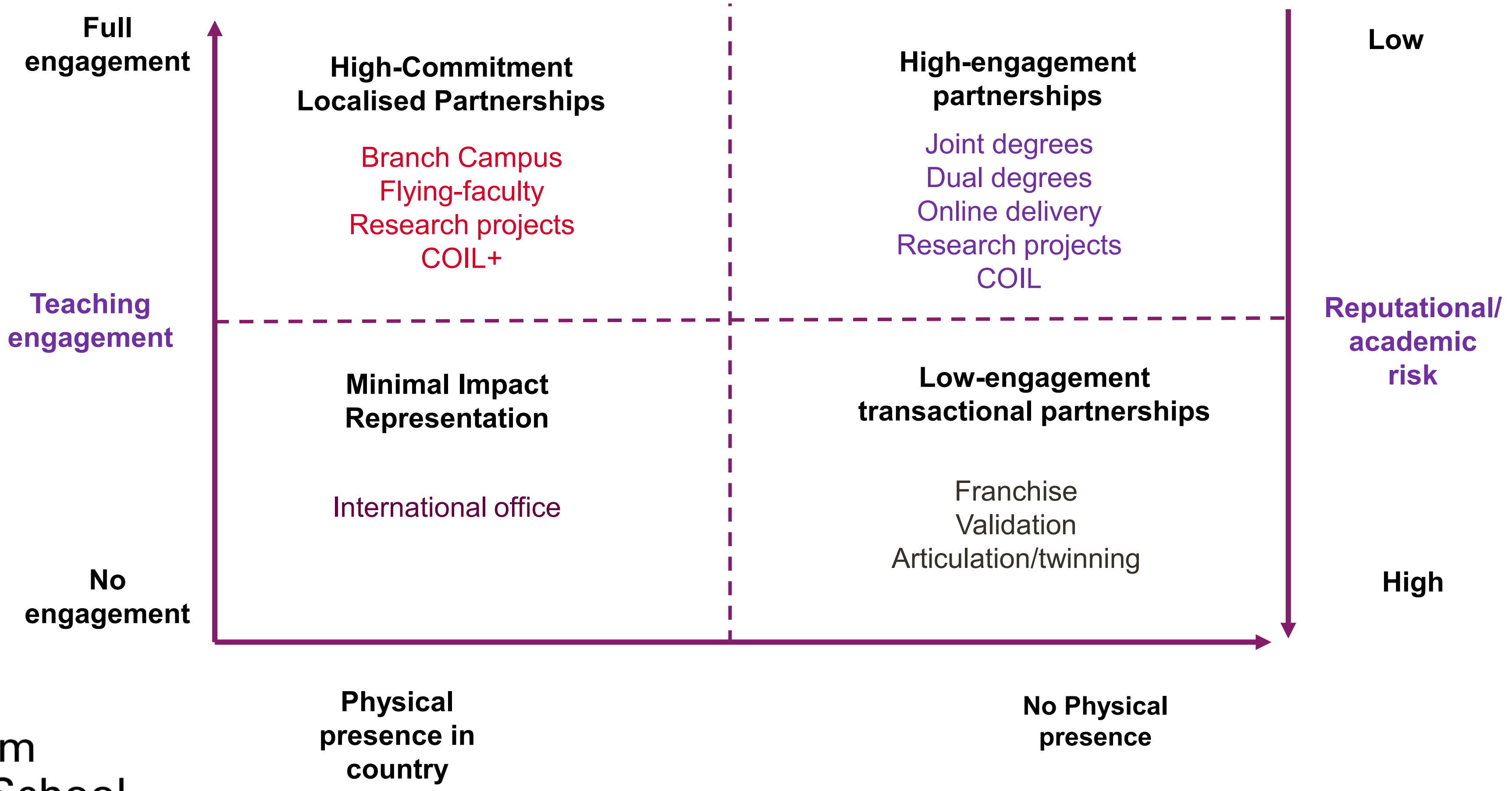
TNE as an integral part of a global engagement strategy



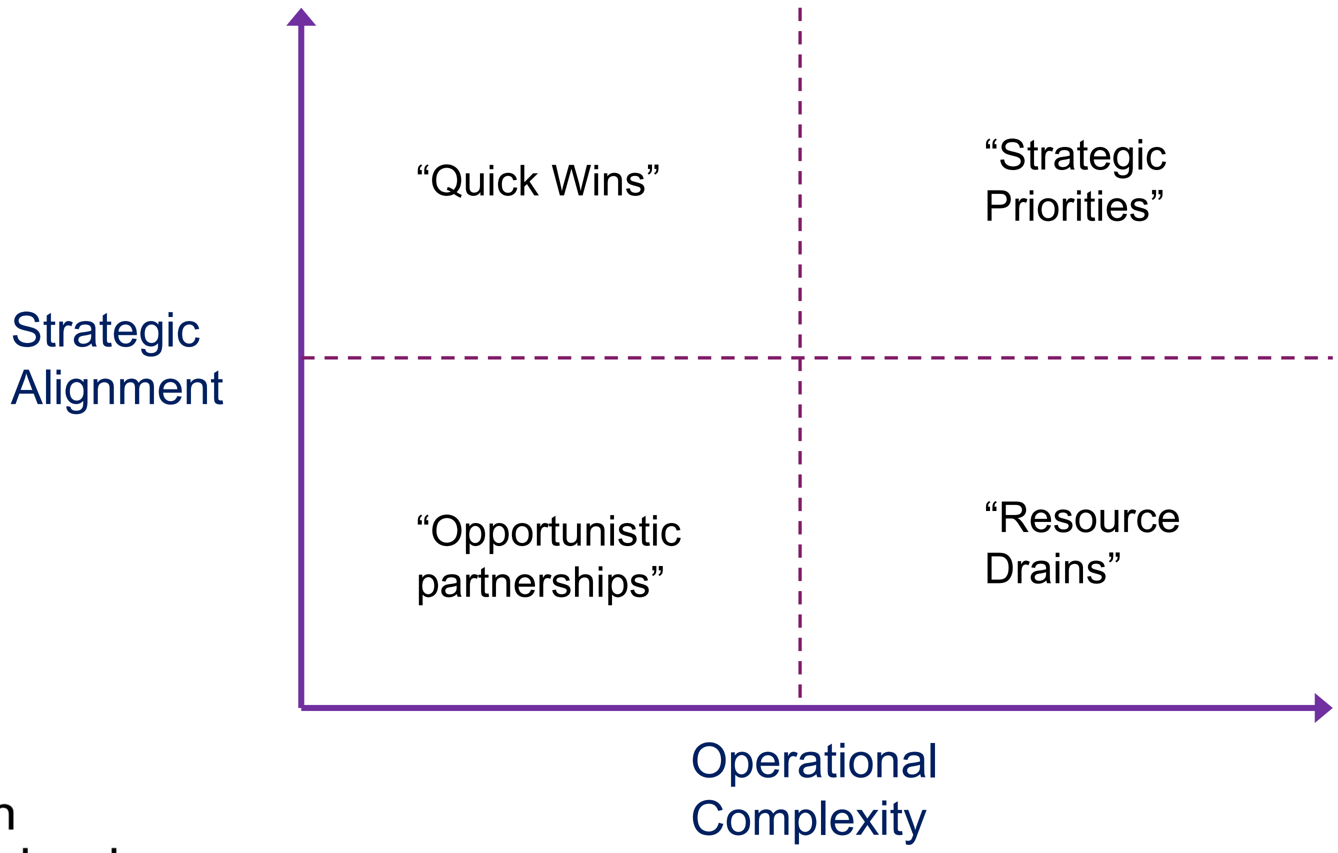
Strategic, equitable and impactful TNE



Taxonomy of partnerships



Navigating Structural Choices



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TNE LIFECYCLE

STAGES, MOTIVES AND OPPORTUNITIES

1

SUPPLY GAP

Early stage TNE comes to fill the supply of HE gap in a host country.
At this stage, the emphasis is on teaching partnership, primarily in the form of Franchising and validation.

The main motive is financial.

2

QUALITY GAP

As the supply in a host country develops and the gap closes, there is a shift towards TNE activities that come to cover niche, high-value, cutting-edge subject areas. Also, there are opportunities to cover possible quality gaps that exist in the local HE.

The main motive remains financial

3

INTERGRATION

TNE becomes integrated in the HE system of the country. This implies opportunities for physical presence and degree awarding powers (in some instances). Also, it requires additional quality assurance compliance.

The motive extents to include global presence and reputation, collaboration and pipeline for international student recruitment

4

MULTI-DIMENSIONAL

There is an array of trends that shape the emerging model of TNE. These include: 1) drive for equitable forms of partnerships; 2) emphasis on financial returns as well as impact; 3) vision to create collaboration across different levels/dimensions

The motive serves a cohesive Global Engagement strategy

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Activity – The International Strategy Canvas

- In your group, review the 9-box International Strategy Canvas and discuss the following questions. The goal is to critique and refine the tool itself using your collective expertise:
- **Clarity & Gaps:** Are all dimensions of the canvas clear? Based on your experience, is there a critical component of international strategy that you believe is missing from this canvas?
- **Connections & Dependencies:** Which two or three boxes on the canvas are most interconnected? For example, how do your Partnership Principles (Box 5) directly enable your vision for Global Experience & Mobility (Box 4)?
- **Refining the Focus:** Is "global impact" the right centerpiece for the Vision & Purpose (Box 1)? Drawing from the presentation, what other core concepts like Resilience or Equity could be central to a university's vision?
- **Actionability:** Look at the 90-Day Action box (Box 9). What single change to the canvas would best ensure this final step is a direct and logical outcome of the analysis done in the other eight boxes?

International Strategy Canvas

1. 🎯 Vision & Purpose
(By 2030, what is the single most important global impact our business school will be known for?)

2. 📈 Key Global Trends
(Rank the top 3 forces shaping education in our key markets)

1.
2.
3.

3. 🌐 Global Student Portfolio
(*What is our target balance (% Inbound Recruitment vs. % TNE)? Where will we focus our primary growth efforts?)*

4. ✨ Global Experience & Mobility
(How will we use physical and virtual mobility (e.g., COIL) to ensure every student has a meaningful international experience?)

6. 💻 Digital Innovation
(Where can we apply digital tech to create the biggest competitive advantage in our international portfolio and student experience?)

5. 🤝 Partnership principles
(What are the top 3 criteria for a 'go/no-go' decision on a new strategic international partner?)

8. 📊 KPIs & Impact Metrics
(how we will measure the success of our international strategy - 1. Financial Health, 2. Global Reach, and 3. Student Impact.)

7. 🔧 Resources & Enablers
(What is the #1 resource gap (e.g., specific skills, funding, policy) we must close to enable this strategy?)

9. 🚀 90-Day Action
(Based on this canvas, what is the single most important, actionable step we can take in the next 90 days?)

TNE and Inbound Mobility Data Tool

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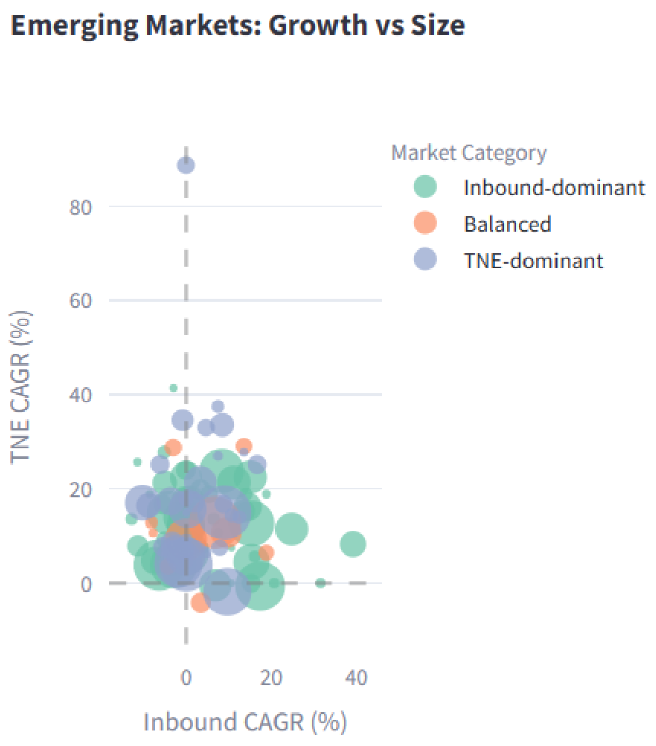
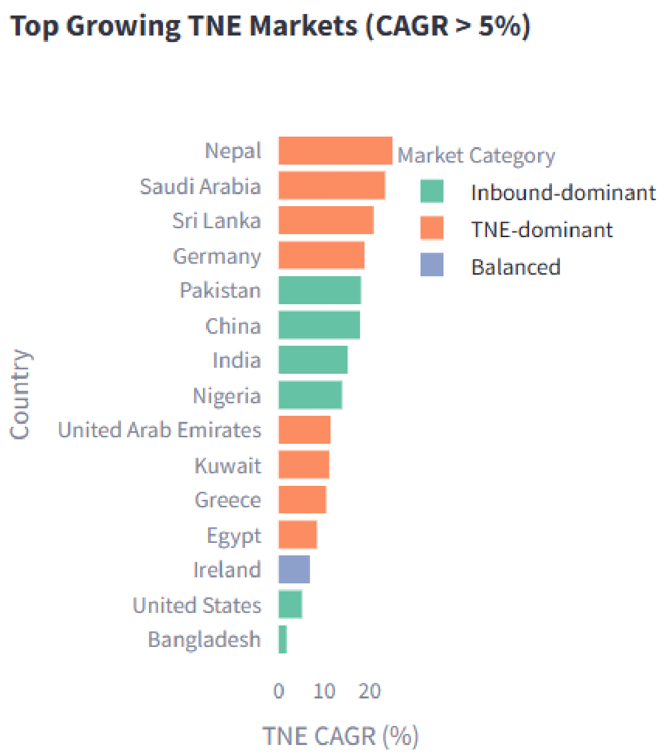
UK Higher Education International Data Platform

- This platform is an experimental project that is aimed at joining the inbound non-UK student and UK TNE student data.
- Through a number of data analytics approaches the platform provides information about 185 countries.
- The analysis includes a classification of countries as “inbound-dominant”, “TNE-dominant”, and “balanced” depending on the size of the inbound and TNE student market.
- To access go to www.TNEHub.org and then click on **“HE Data Platform”**
- For any information or ideas contact vangelis.tsiligiris@ntu.ac.uk





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Thank you