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Post Browne Review: a reflective analysis of marketisation dilemmas of senior managers in English universities

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ABSTRACT

The Browne Review 2010 was a paradigm shift for higher education funding in England, this paper reflects upon the aftermath faced by university leaders through intensified marketisation. A secondary data analysis was undertaken on previous interview transcripts conducted in 2011 of 30 senior managers from a range of English universities. The purpose was to reflect upon the impact of the Browne Review through a current lens in 2021 to establish if the original dilemmas still exist. Senior managers were initially confronted by an *identity dilemma* of either being a business or an educational institution, it found that this has increasingly become more complex. The reflective analysis concludes a decisive *shift in mindset* that English universities now behave similarly to *Corporate Businesses* in an increasingly uncertain and competitive, but restricted market. Consequently, increased consumerist tendencies of students have increased the gap between universities and students' differing perceptions of value for money.

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Higher education; strategy; marketisation; English universities; value for money; secondary data analysis

Introduction

Callender and Scott (2013) claim that the Browne review (2010) was the most *radical paradigm shift* in terms of better funding English Universities. It led to the tripling of student fees (from £3k to £9 K) based on the logic that funding should follow the student. Its consequences were stated as far-reaching, in terms of the ideological, economic, and social function of higher education (HE). The Browne review (2010) envisaged the creation of a fully functioning competitive market in higher education, resulting in an aftermath of strategic dilemmas for university senior management. The main dilemma was, how would universities operate, either as traditional educational institutions or more *like* businesses in a market, with students perceived as customers (Banwait, 2017). Almost a decade later a further review (Augar, 2019) of English HE, assessed the idea of a fully marketised HE system. Its main conclusion was that higher education cannot be left entirely to the market forces and that government direction should play a role to deliver value for

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money. This supports a long-held belief by some, that it is impossible to create a fully functioning market in HE (Marginson, 2017). This is based on the argument that despite student fees tripling to £9000 in 2012, most universities charged the maximum amount which removed any price competition (Bekhradnia, 2013). Augar (2019) challenged universities as not delivering value for money to their student-customers from their increased fee income.

The papers' purpose is to reflect upon the strategic dilemmas faced by the senior managers captured in 2011 (Banwait, 2017) and revisit these through a fresh vision in 2021. This will enable an evaluation of whether the strategic dilemmas from 2011 are still relevant in 2021, as the Browne Review in (2010) had proposed the creation of a market, whilst Augar in (2019) had advocated the need to take back control of the market. This need to reflect is suggested by Palfreyman and Tapper (2014); John and Fanghanel (2015) to help develop the future implications of the accelerated and the permanent nature of the marketisation. This paper commences with the review of literature on the evolution of marketisation of HE, then appraises the challenges of creating a market in HE and the controversial notion of student as customer. The methodology is a qualitative reflective review of 30 HE senior managers interviewed post the Browne review. The findings from an earlier study, (Banwait, 2017) are analysed using secondary data analysis (SDA) (Hinds et al., 1997) and by reflecting upon the original findings in relation to the relevant Higher Education Literature discourse. This forms the basis of our theoretical, practical implications, and directions for further research.

A review of marketisation related English higher education policy reforms

The evolution of marketisation in English HE

Based on neoliberal ideas (Lynch, 2010), marketisation has been agenda of government since the 1980s and universities have been implored to behave like businesses. McCaig (2018) originally illustrated five main stages of the marketisation of English HE (see *Table 1, adapted by the authors to include six phases*).

Prior to marketisation of English HE, there was a transition from an elite to a mass system of HE which commenced in the 1960s known as *The Architecture of HE massification* this being classed as the first phase in *Table 1*. Massification was attributed to the recommendations of both the Anderson report (1960) and the Robbins report (1963). The Anderson report recommended mandatory grants for full-time undergraduate students and was implemented in 1962 (Hillman, 2013). The mass expansion of HE in England from 1963 was a result of the Robbins report (1963). The number of universities during the period between 1960 and 1980 had doubled from 24 to 47, and led to the creation of 31 Polytechnics (*Technical HE*) and participation rates which had tripled from 5% to 15% (Tight, 2009). Shattock (2012) termed this period between 1960 and 1980 as the 'golden age' of English universities, because of generous funding and minimal state intervention.

Post 1980, phase two *The unification of HE* captured the origins of marketisation of English universities from being state funded towards fees, to reduce the burden of cost upon the government. The Jarratt Report (1985) initiated the corporatisation of universities, by concluding that they should be primarily run as corporate enterprises. One of Jarratt's key recommendations was that universities should be led by CEOs to encourage

Table 1. The drivers of marketisation of Higher Education in England (Adapted from McCaig 2018).

Phases of marketisation & participation rates	Overall objectives	Key drivers	Main features
Phase 1: Architecture of HE massification 1960–1980 <i>Participation rate 1963: 5%</i>	Systematic growth and sustainable funding	Anderson (1960) Robbins (1963)	<ul style="list-style-type: none"> • Introduction of student grants. • Public funded system of HE. • Immediate expansion of universities. • University places ‘should be available to all who were qualified for them by ability and attainment’ (the so-called Robbins principle).
Phase 2: Unification of HE 1980–1992 <i>Participation rate 1980: 15%</i>	Improve efficiency, accountability, and human capital	Jarratt (1985) Further and Higher Education Act (1992)	<ul style="list-style-type: none"> • Promoted entrepreneurialism among university and polytechnic leaders. • The binary system unified and HE expanded to encourage institutional competition. • To meet demand for human capital in future knowledge economy.
Phase 3: Expansion of HE 1992–2000 <i>Participation rate 1992: 30%</i>	Diversity as a good	The Dearing Report (1997)	<ul style="list-style-type: none"> • Encouraged diversity and widening participation of HE. • A new landscape of different types of institutions and modes of HE. • The introduction of partial fees of £1000.
Phase 4: Differentiation of HE 2000–2010 <i>Participation rate 2006: 49%</i>	Increased differentiation of the Marketplace	HE White Paper (2003) HE White Paper (2009)	<ul style="list-style-type: none"> • HEIs exhorted to differentiate in the marketplace to attract applicant-consumers. • Introduction of variable tuition fees. • Assumed only the most highly demanded universities would justify the highest fee of £3000. • All universities charged £3000, thus competition on price was absent.
Phase 5: Increasing Competition in HE 2010–2015 <i>Participation rate 2015: 46%</i>	Increased competitive differentiation	Browne Review (2010) White Paper Students at the heart of the system (2011)	<ul style="list-style-type: none"> • Recommended no fee cap, but universities charging fees of more than £6000 faced a levy to support widening participation. Introduced a fee cap of £9000 envisaged that universities would charge maximum, only in exceptional circumstances. • All universities charged £9000, thus price based competitive differentiation failed to materialise.
Phase 6: Value for money in HE 2015–present <i>Participation rate 2020:50%</i>	Risk and exit: the completion and correction of the market?	Green Paper (2015) White Paper (2016) Higher Education and Research Act (2017) Augar review (2019)	<ul style="list-style-type: none"> • Introduced teaching excellence framework to actuate variable fees. • Created a single regulator – the Office for Students (OfS) which manages, via quality oversight and funding incentives, designed to encourage ‘exit’ for failing providers to be replaced by new alternative providers. • Core principle that the market cannot alone deliver policy outcomes, proposed undergraduate fee cut and attack on so-called low-value higher education courses.

an entrepreneurial orientation. It was also aimed to stimulate competition, to encourage efficiency and effectiveness of HE providers. To this effect Universities and Polytechnics were unified by the Further and Higher Education Act (1992) to reposition the UK, by developing human capital for transitioning from manufacturing to a knowledge economy.

The Expansion of HE known as the third phase, occurred between 1992 and 2000, it encouraged academic and vocational diversity for social-economic widening participation. To achieve this the Dearing Report (1997) recommended that different types of institutions and modes of HE were required to increase widening participation. In order to realise this a shift in funding from public to private sources (graduates) was recommended as a necessity to introduce fees to fund HE. This led to a partial tuition fee of £1000 being introduced based on the rationale that graduates earn more than non-graduates, hence the expectation to contribute towards funding their higher education (Barr & Crawford, 1998).

McCaig (2018) observed that vocational diversity alone was no longer enough to remain competitive, therefore Universities were driven to differentiate their courses aimed at different segments of prospective students, this fourth phase is known as '*Differentiation of HE*' (2003–2010). Institutions increased pressure for more funding from the government to achieve differentiation leading to the HE White Paper (2003) which allowed universities to charge a maximum fee of £3000. The assumption was that the most prestigious universities would only charge the maximum fee, to the contrary, all institutions charged the maximum fee of £3000. Therefore, a market in variable fees failed to emerge as the demand for HE continued to outstrip supply (Hillman, 2018). However, despite the increased fees, pressure continued from universities to fund the political ambition of further expanding HE. As a result, the government commissioned the Browne review in 2009 of sustainably funding future HE (Eason 2009).

The fifth phase 2010–2015 *Increasing competition in HE* was described as a radical paradigm shift (Callender & Scott, 2013) because it made competitive differentiation explicit by attempting to create a market, where funding follows student choice. The Browne review (2010) recommended that graduates should contribute more, as they reap the benefits through higher earnings. However, unlike the previous white paper of 2003, he proposed that there should not be a cap on fees. The government agreed with the principle of funding following the student but capped both the fees and student numbers to contain public finances (BIS, 2011). Whereas before, students made a partial contribution, the undergraduate courses are now fully funded by tuition fees underwritten as income-contingent loans. The government policy was derived to encourage competition on price, however, all universities once again decided to charge the maximum fee, therefore was still no variance in fees (Department for Education, 2019).

The sixth phase *Value for money* has been the rhetoric since 2015 and it continues to be debated as to what actually constitutes value for money (Tomlinson, 2017). A desire to stimulate further growth and competition by lifting the cap on student numbers, allowing universities to recruit as many students as possible (Hillman, 2014). Consequently, this led to an increase in marketing spend and a rise of unconditional offers, for which universities have been under the spotlight. Increased competition has also resulted in further scrutiny on how universities are spending their fee income, such as on increasing marketing budgets, new buildings, and senior leadership pay. This has subsequently been

challenged by consumerist students and policymakers on whether universities are offering value for money in return for higher fees (Carasso, 2019). As a response, the HE White Paper (BIS, 2016) introduced the *Teaching Excellence Framework* (TEF) to actuate the market for variable tuition-fees, by emphasising variance in quality of provision related to price. However, TEF proved to be controversial for its universal approach to measuring teaching quality (as gold, silver, bronze) of a variety of HE providers (Bagshaw, 2017).

A consumer watchdog the Office for Students (OfS), a single regulator for all HE providers was introduced by the Higher Education and Research Act (2017). The act was also designed to encourage 'exit' for failing providers to be replaced by alternative providers. In February 2018, the Augar review was commissioned to explore the debate about undifferentiated student fees and value for money (PMO, 2019). Universities are now widely perceived as 'big businesses' vying for fee revenues in a competitive market (Universities UK, 2018; Corver, 2019). These underpinned the core principle of the Augar review that a market cannot alone deliver policy outcomes. Thus, the review proposed a fee cut to £7500 for undergraduate degrees and consolidation of 'low-value' courses. Augar was also tasked with looking at the post-18 provision rather than just HE, this was proposed to address the funding imbalance between HE and Further Education (FE). The proposal to reduce fees has not been popular with universities, however the policy discourse continues to challenge universities about not providing value for money (Donelan, 2020; Williamson, 2020). In 2020, the UK left the European Union (EU) creating uncertainty for the HE sector in terms of research funding and overseas student recruitment. Also, universities have faced another crisis due to the impact of Covid 19, this is compounding the financial pressure further on some already struggling institutions (Drayton & Waltmaan, 2020). Although government support would be conditional on commitment to review senior management pay and removing poor value courses (McVitty, 2020).

The complexities of creating a market in English HE

Brown (2013) proposed that the fundamental goal of marketisation was to create a competitive market based upon fees following the student choice (Willetts, 2011). The proponents of the 2010 market reforms claim that tuition fees would not only help to fund universities sustainably, but they would also unleash the force of student consumerism (Willetts, 2010). The creation of a market in HE would also make it easier for new providers to enter the system. Willetts (2015) reaffirming Jarratt (1985) that universities compete as enterprises. However, opponents of marketisation believed that a market of the kind that the architects of the system envisaged (Jones & Cunliffe, 2020), had failed to emerge because despite the government rhetoric most universities had set fees at a maximum of £9000 (Department for Education, 2019). HE is considered to be a *Veblen good* where price is perceived as a proxy for quality, thus Wyness (2013) claimed that universities had set fees at the maximum level to signal their reputation. Bekhradnia (2013) advises a further complexity to creating a fully functioning market because HE is indirectly funded by the government through taxpayer-subsidised loans. Therefore, Marginson (2017) considers that government intervention is an essential feature of markets in HE to prevent market failures. This is to acknowledge that HE also accrues social benefits, therefore it should be equally accessible irrespective of socio-economic background. Le

Grand and Bartlett (1993) explain the policy intention of increasing competition and choice simultaneously intervening to address market failures as a *quasi-market*. Hemsley-Brown (2011) had concluded the UK's quasi-market system had moved much further towards a less restricted market and consequently universities are now adopting a market mindset (Corver, 2019).

Has the Browne review provided clarity for student relationship with universities?

The attempt to create a market in terms of differential fees has led to further controversial policy interventions, such as linking TEF outcomes to student fees. The logic being that universities which do not do well in the TEF may be perceived as not delivering value for money, whilst for failing institutions there is now provision to exit the market under HERA (2017). Students are now legitimately encouraged to exercise their consumer rights (CMA, 2015) and have progressively demonstrated more consumerist tendencies when choosing and attending the university based on these constructed metrics, leading to the fostering of a marketing mindset amongst universities (Devonald, 2019).

Brooks (2019) argued that *student as customer* (SAC) was a deliberate policy construct of marketisation to justify higher fees. Willetts (2011) had claimed that fees would inject consumerism to harness the potential of SAC, consequently improving the student experience. Kandiko and Mawer (2013) confirmed that heightened consumerism had become a significant factor which had led to rising student expectations.

The relationship between universities and students have developed further with a shift to the student becoming more demanding in terms of their expectations (Nixon et al., 2018; Brooks & Abrahams, 2018). Students now often self-address themselves as customers, this adds further complexity to the university–student relationship (Guilbault, 2016; Jayadeva et al., 2021), however there is a growing gap between what is offered from universities and what students actually value (Hancock & Foster, 2019). To this effect, Finney and Finney (2010) found that ‘customer’ in entirety was a limiting concept and students did not expect to be treated as customers in all aspects of the university experience (Koris & Nokelainen, 2015; Tomlinson, 2017). Guilbault (2018) had alternatively proposed that universities and students should both take an active role in ‘co-creating’ knowledge and move beyond the complex debate of student as customer. This suggests that marketisation has accelerated as a direct result of Browne’s review, but did it envisage a shift in power to the student to this extent. The literature review has appraised three ongoing debates in relation to the Browne review regarding the purpose of a university, in the market-oriented system and the perception of students as customers. These were the cause of strategic dilemmas faced by senior managers in 2011.

Methodology

The focus of this study is to conduct a SDA of interviews conducted with 30 senior managers in a variety of English universities during the period of 2011–2012 immediately after the Browne review. The analysis of these interviews was captured in the doctoral study of the first author Banwait (2017). The SDA method was deemed appropriate for this paper because it involves investigations where data collected for a previous study is analysed,

either by the same researcher(s) or different researcher(s) to explore new questions or use different analysis strategies that were not a part of the original primary analysis (Szabo & Strang, 1997). This paper reflects on the three questions which formed the original study (Banwait, 2017). These questions were posed to Senior managers post-Browne, whether universities would become like business? Would there be a market in higher education? And will students be perceived as customers?

The SDA used the existing data, consisting of 30 original interviews and a reflective analysis of relevant literature to reflect upon the research questions if they were asked today (Hinds et al., 1997).

The paper is reflecting on the original findings from a 2021 vision and therefore the research questions for the SDA are:

- (1) *To what extent have Universities become more like businesses since the Browne review?*
- (2) *Since the Browne review are universities now operating in a market environment?*
- (3) *Is there now clarity on the definition of the relationship constructed between students and universities?*

When carrying out a secondary analysis of primary datasets, Heaton (2020) recommends outlining the original study, the process of data collection, and the analytical processes applied to the data. The purpose of the secondary analysis should be transparent, detailing methodological and ethical considerations and explaining any decisions made regarding missing data so that the interpretative processes of knowledge production are transparent. In practice, this means that in preparation for carrying out a secondary analysis an assessment of the fit between the primary datasets and the secondary research questions is essential (Thorne, 2013).

Data collection of original primary dataset

The original study was conducted over the period of 2011–2012, this period is significant as this provided an opportunity to collect insights from senior managers in several English universities when tuition fees were tripled. 30 face-to-face interviews were conducted and recorded in the participant's own environment, each lasting approximately 1–2 hours. These were semi-structured in design, which enabled a free-flowing conversation with participants therefore providing a better understanding of perspectives (Kvale, 2006). The sample included interviews with 30 senior managers from Banwait's (2017) doctoral study which represented a good cross section of English universities. It included Vice-Chancellors, Pro-Vice-Chancellor, Director of Marketing, and an Executive Dean from different University mission groups. The data included a purposive sample (Marshall, 1996) of 30, coded as: Senior managers (SM), Pre-92 universities as an Older university (OU), 15 from Post-92s as Modern university (MU), and 3 from Private Universities (PU). See Table 2 for the varying sample represented of English Universities.

Data analysis of primary dataset

The original data set was analysed using Braun and Clarke's (2006) thematic data analysis framework to identify themes which emerged from the interviews. The thematic analysis

Table 2. Data used from Banwait (2017) drawn from a cross section of universities.

Abbreviations	Senior Managers (SM)	Pre-92 Older University (OU)	Post-1992 Modern University (MU)	Private University (PU)
Participants Senior Managers (SM)	Total ($n = 30$)	$n = 12$	$n = 15$	$n = 3$

process commenced with familiarisation of the interview transcripts to generate broad patterns. These were coded under headings, thus enabling the gathering and selection of relevant data. This then allowed data to be organised into potential themes, each of the themes was reviewed to ensure coherence. This led to the final stage of the analysis, which was generating final definitions and classifying the themes which had emerged.

Ethical considerations

Heaton (2020) suggests that informed consent cannot be presumed in secondary analysis, and that the researcher cannot rely on any vagueness of the initial consent form. Both Heaton (2020) and Thorne (2013) stated that a professional judgement may have to be made about whether the re-use of data violates the contract made between the participants and the primary researcher. Such judgements need to be based on the fit between the original and secondary research questions and whether the new questions in any way shift the focus of the initial intention of research.

In relation to the secondary analysis presented here, the secondary research questions were generated during analysis of the primary dataset and were directly related to the intention of the primary research; therefore, the judgement was made that the consent gained in the primary research was sufficient to carry out this secondary analysis.

Reflective analysis

The results are presented and discussed under the three main research questions that were posed to the senior managers. Extracts of their responses are included and analysed to derive the key themes.

To what extent have Universities become more like businesses since the Browne review?

In 2011, the original question posed was *Will universities become like Businesses?* (Banwait, 2017, p. 125). The reason behind this question was because Browne (2010) stated 'Our proposals are designed to create genuine competition for students between HEI's a kind which cannot take place under the current system.' It was originally found that overall senior managers in English HE's had felt confronted by an *identity crisis* following the Browne review. This identity crisis had presented a dilemma to whether English HEI's would perceive themselves as a business or as an educational institution. At the time there were differing perspectives depending on the university classification. For example, the response from several modern universities had suggested it would become *inevitable* for them to behave like a business or risk them being competitively

disadvantaged, irrespective of whether they agreed to this notion. As one Senior Manager (SM) responded to the question:

I think you cannot deny that businesses are becoming universities ... Pearson, BPP who are coming into the market, and they will be businesses who are offering higher education. So, since we operate in the same place as those organisations, inevitably whether universities of the traditional kind are businesses or not, they are going to have to adopt more business-oriented behaviours. (SM 2, MU)

In contrast to this, older universities were keen to emphasise their *history and heritage*. They wanted to portray themselves as a *particular* type of business. They viewed their primary purpose to be an institution of education, which would have to be realised through business acumen. Senior Managers from older universities were opposed to this policy narrative, which they felt had become more explicit in stating that successful universities would be those that adopt a more corporate ethos. As an SM explained:

Universities are not businesses and should not be businesses, if one associates the word business with a conventional picture of a business it is there to maximise return to shareholders. I have no interest whatsoever in creating a finance circus for this university other than to feed it back into the development of teaching programmes facilities, research facilities and so on. There was a big cultural difference in my view between the fundamental purposes of a university and of the business. (SM 11, OU)

Alternatively, private universities had wanted to *clarify*, that they sought to offer an alternative approach by *professionalising* the delivery of HE. They explained that their delivery model would be based on conducting extensive *customer* research. They had emphasised that contrary to perception, providing a responsive student experience would be their priority over being solely profit-driven. They wanted to reiterate that they wished to disrupt the status quo amongst incumbent English universities with a *service-oriented* approach. As one private university Senior Manager stated:

When somebody says it is like a business, what I take that to mean is that it is professionalising in its approach in the service it offers to a customer, so others may take a different view that its maximising profit for the management team or the shareholders or whatever, but I don't look at it like that. (SM 1, PU)

The consensus was that universities did *not* view themselves as businesses in a corporate sense at the time post the Browne review. The use of the term *business* had fearful connotations amongst the academic community of being associated with commercialisation in direct contradiction with the traditional values of HE as a public good. For senior managers to avoid alienating academics the term *business-like* was preferred, to articulate the changing nature of how universities would operate due to intensified marketisation. A Senior Manager suggested:

I can remember ... *our deputy director of resources saying to me in a meeting that universities are not businesses, but they are expected to be run in a business-like way, it was interesting in those days as we did not dare say that a university was a business.* (SM 8, MU)

The term *business-like* was interpreted by senior managers as universities needed to start focusing more on efficiency and effectiveness in areas such as resource utilisation and responsiveness to fee-paying students. They acknowledged that there would be similarities between businesses and how universities operate in a more marketised

environment. However, there were subtle differences where *business-like* was considered as a *means to an end* to finance the traditional purpose of a university. For example, one SM clarified:

I think they are business like and need to act increasingly in business ways in terms of thinking of a more competitive market ... Generally being more efficient and effective organisations, but I think universities are also very special cases, as well as being business like they are universities and their relationship with their customers – students is going to be more complex than a transactional relationship because the experience we are providing is different and the nature of the academic community means we are a different kind of organisation that has implications for how it is managed. (SM 9, OU)

In reflection in 2021, have Universities become more like businesses since the Browne review? Consequently, post Browne review the qualitative secondary data suggests that English university were faced with the challenge of whether, to uphold the traditional values of an educational institution or to operate in an enterprising way becoming increasingly more corporate. In 2021, it has been suggested that Universities had been constructed in policy documents as corporate entities (Brooks, 2019) and implored to be businesses by becoming competitive global brands by raising money as PLC's (Willett, 2015). Universities are now widely perceived as businesses (Universities UK, 2018) because of the increased income received (Corver, 2019) and of money spent on non-teaching activities (Augar, 2019) such as marketing, buildings, and corporate organisational structures. Universities are becoming service providers (Davies, 2021) however, he states that 'some universities seem to struggle to reconcile their service sector status, with their perceived position as hallowed fonts of educational and research excellence.' So, in sum, the identity dilemma of purpose still exists to somewhat, notably between their original purpose based on educational delivery verses a service delivery model largely driven and amplified by the Covid 19 pandemic.

Since the Browne review are universities now operating in a market environment?

In 2011, the question posed to senior managers was 'Will there be a fully functioning market in English HE?' (Banwait, 2017, p. 154). The reason why this question was asked because Browne (2010) intended that universities should be able to set their own tuition fees that allow a market in price to emerge. The secondary qualitative data revealed a feeling of *uncertainty* amongst Senior Managers about the intentions of a then Conservative-Liberal Democrat coalition government to create a market in HE. This was due to a perception that the Conservative party was *ideologically committed* to the idea of creating a market in HE. However, they were *politically constrained* by their coalition partners the Liberal Democrats, who were opposed to the policy.

Banwait (2017) had found that Senior Managers from modern universities were *suspicious* of the belief that the Conservative-led coalition government wanted to *squeeze them out* by orchestrating a market. They were concerned that such a market would disadvantage them primarily because it would further *strengthen* the reputation held by older institutions. Another concern for modern universities would be further disadvantaged by government encouragement for new *alternative providers* to enter the envisaged market.

As one SM had stated:

I suspect government expects that it will be the new universities of the kind that most members of the government and most members of the conservative government would not have studied at, that will go to the wall, it might be right that some will go, but there are an awful lot of universities that are not financially very stable, and it will be interesting to see what happens to them in a brave new world in which they are fully exposed to market forces. (SM 2, MU)

On the other hand, the older universities had been critical that the government had *constrained* the opportunity for an *unrestricted* market to emerge by capping tuition fees and student numbers (BIS, 2011). These Senior Managers had lamented that the restrictions would *limit* their opportunity to expand market share. Their belief was that an unrestricted market would have provided a stronger likelihood for a clear differentiation between institutions, rather than what subsequently happened in 2012, when every university charged a similar fee. As one SM replied:

There is, but I think the government actually restricted the market when they restricted the maximum fee that we charge to £9,000, the Brown Report was very clear, its recommendation was that universities could charge up to £12,000 a year, if they had of done that, I think it would have stretched out the prices people charged, making it £9,000 seemed for many institutions an attainable figure. (SM 2, OU)

An alternative view was found amongst Senior managers from private universities who had perceived that they were not in the same market as public universities. As such, Private universities considered themselves as *outsiders* – who expressed an affirmation to the introduction of market mechanisms. They believed incumbent universities were not only *emotive* and *cynical* of the term *market*, but also, they were in *denial* of its impact upon the future of the HE sector. As one SM had asserted:

I know it's an emotive term for those involved in it, but for people looking from outside its difficult to understand what the objection is to calling it a market and my own personal belief is people start to take issue with the definition rather than actually accepting it and doing something about it. (SM 1, PU)

In 2011, the opinions amongst senior managers towards the creation of a real market were *polarised*. However, there was a consensus that despite government *rhetoric* of a market, there was no price differentiation. This led to the emergence of a second theme termed as *market-like*. As one SM from a modern university explained:

So, the notion of a market in higher education is not new, but Browne's intention was to make the operation and the funding of higher education much more market like, much more dependent on the decisions of consumers, students as consumers based on traditional market principles of information choice and an assessment of kind of return, and all of those kinds of things ... Clearly that has not come to pass like the way Browne envisaged. (SM 6, MU)

In 2021, *Is there now a 'fully functioning market' in higher education?* There is not a fully functioning market because of the following reasons: there is no differentiation in price, as was originally envisaged by Browne's proposals and government ministers, who had hoped that universities would have charged the maximum fee in exceptional circumstances, with the median fee being £7000 (Hubble 2010). University choice is still and will continue to be dictated by reputational hierarchy (Croxford & Raffe, 2015). Knight (2020) suggests that choice has become increasingly complex for Students who are

faced with homogenised prospectuses. However, Universities are in a marketing mindset, they are competing for students through aggressive marketing tactics such as unconditional offers, freebies, and competing on facilities (Devonald, 2019). Oeppen Hill (2020) additionally found that market segmentation has increasingly developed between post 92's appealing to emotion and the Russell group to promising credibility. As a result, Augar (2019) argued that the envisaged creation of market has not worked because universities have lost their sense of civic responsibility and developed a 'win-at-all-costs' mentality (Farrelly, 2020). So, in answer to the question, *no – not fully*, the characteristics are still *market like* and thus the dilemma still exists due to government reluctance to fully unleash a market in price and instead now mooted a reduction in fees to £7500 (Augar, 2019). This was closer to the original median fee of £7000 envisaged by Willets in 2010.

Is there now clarity on the definition of the relationship constructed between students and universities?

In 2011 the question posed to senior managers was 'Will students be perceived as Customers?' (Banwait, 2017, p. 171). The reason why this question was asked was because Browne, 2010 intended that funding will follow student choice to unleash the forces of consumerism. Perspectives from Senior managers of modern universities at the time had conceded the notion of *student as customer* (SAC) had been thrust upon them. They thought that it was a *deliberate* attempt by the government to justify the introduction of higher tuition fees. Modern universities felt they would have little choice but to accept that student choice will determine university survival. One SM had conceded:

I wish there were a different way of funding higher education; I am not quite sure what it would be, because I think there is a difficulty that we have at the moment that all the politicians are saying there is not enough money, if that is the case then I would rather maintain the participation level but students pay in some way than reduce the number of people coming to university, because I think the consequences for social mobility are much worse, the reduction would be substantial – and that I think would have a worse consequence. (SM 1, MU)

In contrast, SMs from older universities were *opposed to the idea* of SAC, because they viewed education as an *emotional and intellectual exchange*. They had emphasised that the charging of higher fees did not mean that education becomes a *financial* transaction. They argued that students would be paying to be a part of a university community rather than *buying* a degree. As one SM clarified:

I don't see students as customers, I might sometimes use the term how the customers see it but actually I don't think they are just customers they are also consumers, they are also critical evaluators, you know – there are a whole range of roles that are assigned to students, but I don't think they are just buying a product I think they are engaged in an interaction and a very important interaction with those people who teach them. (SM 2, OU)

Private universities were *eager to amplify* their affirmation and encouragement for students to view themselves as customers. They believed that they were *better positioned* to capitalise on the rise of SAC in comparison with *incumbent* universities. They were keen to exploit the *historical opposition* of public universities to the idea of semantically addressing students as customers. As one SM claimed:

I think the main body of students operates as customers – they see themselves as customers and it's that cultural thing – they want to know when they are going to get their feedback, when they are going to get their text book, when they are going to get their exams, all this is demand, demand, demand, that is customer behaviour, I think it is going to be more rampant as they are going to insist on more rights now, because they are paying for it and all that stuff. (SM 1, PU)

It was discovered that the consensus amongst *SMs*, suggested that students paying higher fees, would result in a *rise in consumerist attributes* which would have to be managed. Additionally, the *interactive nature* of the student–university relationship suggested a third theme as students having characteristics which can be termed as *customer-like*. One *SM* suggested:

I see them as customer like, and I certainly see them at the point of entry as being more customer like than in previous decades ... customer decision making is quite helpful in understanding how students make decisions and move through the application process, do I see them as customers when they are here? Well, kind of, but they have got an awful lot of responsibilities back to the organisation, and it is about being clear about what those responsibilities are. (SM 1, OU)

In 2021, *Are university students now 'Customers'?* It is not as clear cut as that, in fact various terms have emerged to satisfy the semantic and ideological opposition of academics to the homogenous metaphor of *student as customers*, these heterogenous terms are consumer, co-creator, co-producer, and client, which fundamentally means it is not a transactional relationship (Dollinger et al., 2018; Tarı Kasnakoğlu & Mercan, 2020). However, Brooks (2019) claimed that student as customer is a political construct that has been normalised through university channels such as marketing communications and further legitimised through the creation of the Office for Students (OFS) and enforcement of consumer rights through the Competition Markets Authority (CMA). Another aspect that has emerged is the student perspective of them being addressed as customers, this adds further complexity to the university–student relationship. Nixon et al. (2018) found that they viewed themselves as customers, in contrast to Brooks and Abrahams (2018). Tomlinson (2017) alternately found students do not see themselves as customers in every aspect but have consumerist tendencies. In answer to the question, students are not viewed as customer in their entirety, however they possess increased consumerist tendencies, whilst the semantics debate continues. This has been amplified over the last year during the Covid 19 pandemic, where the question of *value for money* becoming prevalent, with many students stating that they are paying for their experience (Neves & Hewitt, 2020).

Theoretical implications

The paper has three main theoretical implications based on the literature review and from applying the reflective methodological approach. It has firstly contributed to the knowledge of the evolution of marketisation of English Higher Education by analysing past perspectives of senior managers, who were faced with implementing the Browne Review. In 2011, senior managers had considered universities as *business-like* rather than fully fledged businesses, however reflecting back it can be seen that the policy intention was further explicitly reinforced by Willetts in 2015, pushing the vision of

the Browne review (2010) for English universities to become more like global PLCs (*Public Limited Companies*). The first implication is despite prevailing marketisation tensions, (Jones & Cunliffe, 2020) regarding a deviation from a university's traditional value of education, (Augar, 2019) universities are now widely perceived by their stakeholders as corporate businesses, (Universities UK, 2018). Universities are structured and additionally demonstrate behaviours of corporate entities, although they are still constrained by increasing government demands to deliver more for less operating in an austerity market.

Secondly, senior managers had concurred that they would be operating in a *market-like* environment as the government was reluctant to create an unrestricted market because the fees remain capped and universities were broadly charging the same (Bekhradnia, 2013). Despite confirming the complexities of creating a fully fledged market in HE (Marginson, 2014) the literature review concluded that English universities have now shifted towards developing a *marketing mindset* (Corver, 2019), to compete for vastly increased competitive revenues since the tripling of tuition fees in 2012. Finally, senior managers were reluctant to semantically concede students as customers instead perceiving them to be *customer-like* despite acknowledging the controversial metaphor (Vuori, 2013) of *student as customer* as the direction of travel. The literature review found that policy interventions such as (CMA, 2015) through which students are encouraged to exercise their consumer rights and (HERA, 2017) which led to the creation of the student-consumer watch dog 'Office for students' are now instrumental in the adoption of a consumer mindset amongst English universities (Devonald, 2019). The strategic dilemmas post Browne are still present and have become more complex in relation to defining the nature of university/student relationships as heterogeneous consumers as opposed to homogenous customers.

Practical implications

The theoretical implications point towards a more competitive mindset amongst English universities operating in a complex large-scale market. This paradigm shift has changed their context and now forms the basis of three practical implications for university senior management. Marketisation has accelerated since the Browne review and consequently the debate of students leaning towards stronger consumerist characteristics has strengthened. Firstly, universities need to clarify their institutional service offering, to define their relationship in meeting student expectations, similar to that of a service offering provided by a private gym membership. Fees pay for the membership and services offered, but do not guarantee improvements in the body aesthetics or levels of fitness, without sufficient input. Therefore, students become *members* of a higher education institution, with a clearly defined service agreement providing access to institutional facilities, knowledge, and services.

Secondly, despite the reality that universities are now perceived as businesses (Universities UK, 2018) the question for individual universities is, what kind of business do they want to be. They should provide better clarity of purpose and define the market space that an individual university wants to occupy. This may enable universities to assess the organisational capabilities required, to successfully serve their target markets in the changing market context.

Finally, a university leadership-oriented culture towards delivering sustainable longer-term student value as opposed to short-term student satisfaction should be fostered, by creating an environment in which university members (students) can both play an active role in *co-creating* knowledge by acknowledging them as consumers.

Limitations and direction for further research

The main contribution of this paper is that it provides a reflective analysis of the strategic dilemmas of senior managers in English universities at a significant period after the Browne review. However, this research is not generalisable due to being a qualitative study due to the limited sample size and cross-sectional time horizon. Therefore, quantitative research could be undertaken to gain wider insights from other stakeholders, such as staff and students about their response to marketisation-related themes which have emerged from this study. Additionally, further qualitative research could be conducted to understand current perceptions of university senior managers about how marketisation has unfolded and what major challenges are being faced today.

Disclosure statement

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