

**Contrasting contexts:**

**An exploration of learning and teaching strategies within  
Higher Education.**

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## **Abstract**

This thesis examines how universities position learning in three contrasting higher education (HE) contexts. Using international documentary analysis, it investigates 24 university strategy documents selected to represent national variations in HE systems: Norway, characterised by egalitarian values and state governance; an elite sample from the United States; and South Africa, marked by lower levels of participation.

The analysis identifies differences in the documents showing context specific influences but more noticeably, substantial similarities in how universities describe their purpose. Across all three contexts, universities present a confident and aspirational narrative, positioning themselves through commitments to research, education, and societal contribution. Through a lens of learning theory, the analysis identifies that explicit references to learning theory or theorists are rare, but there is strong implicit alignment between the strategic discourse and recognised learning theory and contemporary debates. The thesis develops a classification of learning identities describing the varying levels of explicitness and coherence with which learning is represented. Ten institutions within the sample demonstrate a strong learning identity and it is proposed that this clear articulation of a learning identity within university strategies enhances transparency of ethos, clarifies institutional priorities, and supports differentiation in an increasingly competitive and diverse HE sector. The thesis argues for the value of prioritising learning and its transformative potential within universities. It argues that obscuring the position of 'learning' diminishes the essence of a university, and that reclaiming learning as central to strategic and operational thinking enables universities to fulfil their educational and societal roles in a global context. Implications for research and practice are discussed, making a claim that the research, and particularly the development of a typology of learning identities, is a significant contribution to extant research.

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**Author's declaration:** I confirm that this thesis is my own work and has not been submitted in substantially the same form for the award of a higher degree elsewhere. No sections of the thesis have been published, or submitted for a higher degree elsewhere.

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## **Publications derived from work on Doctoral Programmes**

None of this research has been published prior to submission of the thesis.

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## **Chapter 1: Introduction and Background**

### **1.1 Introduction to the chapter**

A good strategy document explains where the institution wants to go and how it intends to get there. For a university, this ought to reveal what it sees as important and how it views its purpose. However, this is perhaps not as straightforward as it may seem; with significant shifts in the Higher Education sector in recent decades some commentators claim the role of universities has been transformed. To what extent has an increasingly global and competitive context led universities to move away from more traditional missions of intellectual enquiry and critical thinking? Are we in danger of losing a key focus on the pursuit of learning by focusing too much on political rhetoric and skills for employment? Does this vary in different countries and HE systems? This chapter sets out the context for a research project to explore these issues, arguing that learning theory should underpin the work of universities and that the discourse of learning and teaching plays a significant role in this. This study examines university strategy documents to identify the underpinning learning theories and determine either explicit or implicit conceptual underpinnings.

The chapter begins with an outline of the research and the rationale for the approach adopted; it then explores the importance of the constituent parts of the study, namely strategy, discourse and the cross-cultural dimension; the research design is then explained before presenting an outline of the thesis.

### **1.2 Outline of the research project**

This study investigates the way learning is framed in university strategies through a documentary analysis of the published strategy documents of universities in three international settings. It adopts a comparative case study approach in three distinct contexts to compare and contrast the strategies in relation to their context and to each other. Firstly, the Norwegian public sector universities, secondly South African universities and thirdly a selection of elite US universities. The rationale for the choice of contexts is their distinctive and contrasting nature (this will be explored in more depth below). By comparing three different settings this

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offers an insight into issues about global higher education. Eight university strategy documents are studied for each national context, creating a sample of 24 documents in total. The international comparison aims to investigate whether the learning and teaching strategies adopted by organisations reflect the cultural and political drivers for universities within the different settings. It aligns with a call from Tight (2021, p.195) for researchers “to think and act more globally and internationally”.

My research examines university strategy documents through the theoretical lens of learning theory rather than as instruments of managerial process. This surfaces the underlying conceptions of learning embedded within university discourse. I propose that learning theory has a critical role in shaping pedagogical practice and that the language of learning exerts significant influence on strategic direction. Interpreting these documents from a pedagogical standpoint provides insight into the institution’s espoused teaching philosophy, what is intended by policymakers and strategists, even if this may diverge from practice.

My study interrogates the extent to which university strategies are theoretically grounded, responding to scholarly concerns regarding the limited use of learning theory in teaching and learning research (Tight, 2004; Ashwin, 2012). By mapping strategy documents against key learning theories, the analysis evaluates the evidence base underpinning institutional approaches and contributes to the development of more theoretically informed strategies. Employing learning theory as an interpretive framework establishes a coherent basis for cross-institutional comparison.

### **1.2.1 Rationale for the research and researcher positionality**

Through both my background in Human Resource Development and my studies in Psychology I have an interest in the way people learn, and as an educator in how we facilitate that learning. My previous research has focused on understanding and facilitating effective learning both within workplace and education settings. In studying connections between teaching and learning I’ve gained insights that help me shape the way I design teaching and support students’ learning. Understanding how students learn and how we can help them

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develop effective learning strategies ought to be a key focus for educators and yet within higher education (especially more elite institutions) lecturers are more likely to be selected for their research profile without any assessment of their ability to teach. In schools, a teaching qualification would be a requirement but not within the HE sector. The system therefore prioritises knowledge and assumes the transmission of this knowledge to students is a straightforward process. I disagree, learning is complex and multifaceted, and established university practices often perpetuate prior advantage, whereas a better understanding of learning would enable us to redress some of these inequalities. For example, in a study about informal collaborative learning, my colleagues and I proposed that an understanding of such concepts could help universities facilitate more inclusive teaching and learning practice (Glaister et al., 2023).

I have now worked in universities for twenty years, and prior to that was a student for five, and have witnessed a shift in discourse where learning is now often obscured from debates. In the UK what I witness first hand, read from scholars in the sector, and see represented in the media, is a continued drift to greater marketisation and managerialism, with the value of universities undermined or interpreted by limited metrics. An example of this reductive approach is the importance now placed on 'experience', 'satisfaction' and 'success', concepts that are increasingly defined solely by the ways they can be measured. This narrow focus is both reductive and short-termist, as it ignores the broader, less tangible dimensions of these concepts. For example consider the NSS question "How well has your course developed your skills and knowledge that you think you will need for your future", outside of specific professions, this seems an impossible ask for students, who cannot reasonably be expected to predict their future developmental needs. This limitation is illustrated in some of my previous research on reflective practice with HR professionals, where one participant who was candid about the fact he struggled to engage with reflective practice on the course explained: "it wasn't until that became relevant to my own development in terms of holding me back and actually allowing me to grow and develop as an individual within the workplace and outside of the workplace that I actually thought (clicks fingers) 'yeah, I get that now'" (Griggs et al, 2018, p. 1179). I

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wanted therefore to refocus and explore the way in which universities position learning and reflect on the implications of this.

Another influence is my current role where I work in a department focused on inclusive practice, removing barriers to higher education for under-represented groups and making learning accessible by adopting inclusive pedagogies. I was therefore particularly interested in comparing environments of elite and egalitarian HE systems. I identified Norway and the US as relevant contexts. As I began to look at the two contexts I was conscious that both had high participation rates in HE and wanted to also look at a context where participation is low. I therefore introduced South Africa and the final study focuses on these 3 national contexts. As I'll show in the literature review there is scant research which considers comparative studies of HE strategy so the three contexts addresses a gap in the current literature. Due to the complexity created by so many potential variables in the analysis it did not feel appropriate to attempt more than three countries within the scope of my thesis.

Prior to starting my PhD studies my research experience involved in-depth qualitative analysis often collected through interviews, focus groups and case studies. In the policy modules I undertook in year one I began to see the way the scope under investigation could be widened by using secondary sources. This opportunity to investigate other HE systems, and broaden my knowledge beyond a UK context, was very appealing. It created an opportunity to join debates about modern higher education, the role of universities and the challenges faced in the current system. This connected with scholars who had been influential to my understanding of universities and the need to defend or influence their future direction (Willetts, 2017; Collini, 2017; Ashwin, 2020; Barnett, 1990, 2011, 2022; Maskell and Robinson 2001). It also speaks to the value of higher education research and how this can help us understand and improve practice (Tight, 2021a). Critically examining strategy and policy also gave me a way of looking at universities from a different perspective, understanding some of the history and political influence that have shaped our current system. This ability to think at a macro level offered a nice contrast to some of the more micro studies I have done previously. This led to my decision to analyse strategy documents as publicly

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available statements from the university which gave me access to a diverse sample of institutions.

Having read widely on different forms of discourse analysis I found my view aligned with that expressed by Gabriel and Lester (2013) (see below) so the language both tells us something about the university's position and can also be influential in shaping the environment. This was influential in my thinking of strategy documents as more than just a written text but that the way learning is positioned in the documents is a constitutive element in how learning is perceived. Viewing documents from across three countries in different HE environments therefore offers a view not just how learning is positioned by senior actors in those institutions but how it is collectively understood across higher education.

"...we presumed that language, in all its forms, was constitutive rather than representative or reflective of a social reality (Edwards, 1997). Discourse choices can be assumed to always be doing something, even while being informed (yet not determined) by broader structures and institutionalized practices."(Gabriel and Lester, 2013 p.8).

### **1.2.2 Research Questions**

The research questions frame the aim of critically examining how universities articulate learning in their strategy documents across three contrasting contexts. By placing learning theory at the centre of the analysis and adopting a comparison across different national settings, the study goes beyond institutional rhetoric to interrogate the foundations shaping higher education strategy. In doing so, it directly addresses gaps in the current literature around the theoretical underpinnings and cross-cultural aspects of university strategies (these gaps will be explored in greater detail later in the report).

RQ 1 What does an analysis of university strategies tell us about the role of modern universities?

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RQ 2 Are underpinning learning theories evident in the published student education strategies of universities?

RQ 3 How do universities position “learning” in their strategy documents?

RQ 4 What does a comparative analysis reveal in 3 distinct contexts?

### **1.3 Background**

*“The essential nature, role and purpose of the university have long been questioned.” (Tight 2024, p.48)*

This section outlines the shifting role of universities and resultant questions about their purpose. This is introduced here as the broad context within which my research takes place (that is, the current higher education climate), before the importance of strategy and discourse are explored and the rationale for a cross-cultural approach is explained.

Despite the significant transformation and rapid expansion of the higher education sector globally (Collini, 2018; Willetts, 2017), it is vital not to lose sight of education as the central mission of universities. The proliferation of institutions, Willetts (2017) estimates there are now around 10,000 universities and 20,000 other higher education providers, has led to a diversity of contexts and purposes. This diversity and the pace of change risk diluting the fundamental educational role of universities. This is supported by Ashwin (2020) who highlights a worrying trend where economic arguments and market driven priorities are increasingly overshadowing the educational purposes of higher education. Collini (2018) underscores this by observing that the entire ecology of higher education in Britain has been transformed, a phenomenon mirrored worldwide (Altbach, Reisberg and Rumbley, 2019). The latter describe an “academic revolution” shaped by political, social, and economic forces, including mass participation, internationalisation, technological change, and funding pressures.

Tight (2012, p.3) attributes the move from elite to mass higher education to “the rise of the so-called ‘knowledge society’, technological developments, globalisation and increasing international competition.”, while Lafuente-ruiz-de-

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sabando, Zorrilla, and Forcada (2018) stress the impact of these changes on the level of competition between universities, seeking to attract increasing numbers of home and international students. Yet, as universities increasingly frame their missions in terms of value for money, competition, and employability, there is a real danger that the educational aims of the university are being overshadowed. Certainly, the current emphasis on value for money, competition and employability skills seem a long way from more traditional notions of critical enquiry. Nygaard and Belluigi (2011, p.657) assert that “The role of higher education (HE) is to help, inspire and guide students in their development of knowledge, skills and competencies which they can apply in their future lives.” This change in language to knowledge, skills and competences represents a shift in the educational mission, rooted in traditions of critical inquiry and intellectual exploration, exemplified by Kant’s vision of the university as a space for free reason and philosophical study (Willetts, 2017), which seems at risk of being sidelined. Within this context Gunn (2023, p.10) suggests “The teaching mission of the university is at a critical juncture, having been subject to considerable change”.

Critics such as Marginson (2013) raise concerns about the extent universities are adopting a neoliberal or managerialist approach. Similarly, Olssen and Peters (2005) assert that the prominence of such discourses has created a fundamental shift in how higher education institutions define and justify their existence. Further, they suggest a focus on performance and output measures has supplanted open intellectual enquiry and debate. Correspondingly, Gouthro (2019) worries that societal concerns related to citizenship and equality are discouraged in a neoliberal context. Concerns about neoliberalism in higher education centre on the transformation of universities from public institutions serving societal and intellectual goals into market driven organisations focused on competition, efficiency, and profit (Alhaija, 2024). Tight (2019) describes a neoliberal ‘turn’ in HE. Essentially critics suggest neoliberal policies have promoted the commodification of education, treating students as customers and knowledge as a product, which has led to the prioritisation of market demands over broader educational and civic purposes. Gunn (2023) comments on the expansion of the notion of students as consumers in higher education debates.

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This shift is associated with reduced public funding, increased reliance on private investment, and the proliferation of managerial practices that subordinate academic values to corporate imperatives (Morley, 2024). Critics argue that these changes undermine academic freedom, erode the quality and diversity of education, and diminish the role of universities as spaces for critical thought, social responsibility, and democratic engagement. Giroux (2014) even wrote a book titled “Neoliberalism's War on Higher Education”! Furthermore, neoliberalism has contributed to precarious working conditions for academics, increased student debt, and growing inequalities in access and outcomes, raising questions about the long-term sustainability and ethical foundations of higher education systems shaped by market logic.

I argue that the implications of this shift for student education strategy are profound. As Prosser and Trigwell (2014) point out, expanding student numbers have led to larger cohorts and less personalised teaching, while Dugas et al. (2018) document academic frustration with the loss of professional autonomy and increased workloads driven by marketisation. Molesworth, Nixon and Scullion (2009) raise concerns that the marketisation which has accompanied the growth in the sector produces a pedagogical constraint and argue that the market discourse encourages students to see themselves as consumers seeking a degree, rather than as learners engaged in personal and intellectual growth. Further, Compagnucci and Spigarelli (2020) argue that universities are increasingly required to focus on a third mission and make a contribution to society. They suggest universities were traditionally seen to have two missions for research and teaching, but this third mission introduces more emphasis on knowledge transfer and relationships with external stakeholders. However, Gunn and Minstrom (2021, p.545) stress that this is not new, and universities have always had these “connections to the public sphere around them”. Whilst this emphasis on the wider contribution of universities is important and supports their impact, I argue that it is essential that these do not eclipse the core educational mission. Further, in a sector facing resource cuts and external measures of success, the balance of and priority given to different agendas becomes increasingly challenging. If we have to do more with less, we need to be mindful what gets left behind or devalued. As Rhoads, Torres and Brewster (2005)

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observe, competition-based reforms risk redefining universities primarily as engines of economic growth, rather than as places of learning and critical inquiry. My view supports that of Collini (2017) who argues that the sector's rapid changes have left us disoriented, with a sense that we are losing our traditional understanding of the university's role without having found a better alternative. I therefore propose that to ensure the continued value and integrity of higher education, it is imperative that universities reaffirm education as their central purpose, resisting the drift toward an exclusively market oriented identity.

As my thesis contends that managerialist and neoliberal approaches have been detrimental to the fundamental purpose and principles of higher education, it may appear contradictory to advocate for the importance of strategy. However, I argue that in the face of these shifting paradigms, the deliberate alignment of institutional strategy with core academic values, particularly those related to learning, is not only appropriate but essential. Rather than accepting strategy as a tool for market driven objectives, I propose that it can serve as a mechanism to safeguard and reinforce the foundational ideals of higher education. In this way, strategy becomes a means of ensuring that the central mission of fostering critical inquiry, intellectual growth, and the public good is not further eroded, but instead actively protected and advanced amidst ongoing external pressures.

Building on this argument, it is crucial to acknowledge that what institutions choose to measure inevitably shapes behaviour and signals what is valued within the academic community. The current preoccupation with key performance indicators (KPIs), such as National Student Survey (NSS) results and other quantifiable metrics, has led to a skewed institutional focus on outcomes that are easily measured, often at the expense of less tangible but arguably more vital aspects of higher education. This measurement driven culture risks marginalising the true potential of learning and the development of critical thinking, creativity, and civic responsibility outcomes that are difficult to quantify but central to the educational mission. Consequently, if strategy is to be genuinely aligned with the core values of higher education, it must resist the reductive logic of measurement and instead recognise and promote the full spectrum of academic and personal

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growth. Only by doing so can universities develop a clear institutional identity that is both authentic and resilient in the face of external pressures.

### **1.3.1 The importance of strategy**

*“Education strategies represent to a greater or lesser extent an institution’s educational ethos and provide the institution with an opportunity to articulate priorities, processes and what makes their institution unique.” (Winstone, 2022, p.1111).*

This section sets out the importance of strategy for student education. In this section, I argue that universities must maintain education as a central mission and purpose, and that a clearly articulated educational strategy is essential for ensuring all stakeholders understand institutional priorities. The literature demonstrates that the importance of educational strategy has long been recognised, yet its implementation and impact remain contested. Keller (1983, p.97) observed that many American universities were “groping towards an academic strategy – a clearer sense of its educational goals and objectives and better means of allocating resources in order to get there.” This early recognition of the need for strategic clarity is echoed in the UK context, where Gibbs, Habeshaw, and Yorke (2000) argued that rapid change in higher education necessitated more sophisticated strategic planning for learning and teaching across entire institutions. Further, Tight suggests a clear education strategy has increasing value with the increased globalisation and competition in the sector (Tight, 2012).

Recent scholarship reinforces the view that strategic decision making is now central to HE practice, particularly in response to external shocks such as the Covid 19 pandemic (Rapanta et al., 2021). Student education strategies are not only instrumental in scrutinising and improving teaching quality, but also in shaping a distinct pedagogic identity for institutions (Clegg and Smith, 2010). Tight (2012) further suggests that a clear education strategy is increasingly valuable in a sector marked by international competition and globalisation, while Ashwin (2020) notes that such strategies provide a counterbalance to the dominance of economic narratives in public debate. These perspectives

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underscore the necessity of a clear and explicit educational strategy, not just as a bureaucratic exercise, but as a means of reaffirming education as the core purpose of the university and guiding stakeholder understanding and engagement.

Additionally, for educational strategies to be truly effective and transformative, they must be underpinned by robust learning theory. Without a theoretical foundation, strategies risk becoming collections of well-intentioned but potentially disconnected initiatives, shaped more by tradition or external pressures than by evidence of what actually supports student learning. As Tight (2004) and Ashwin (2012) have argued, the lack of explicit theoretical underpinning in learning and teaching research can undermine both the coherence and impact of educational practice. Grounding strategy development in learning theory ensures that decisions are informed by a deep understanding of how learning occurs, enabling universities to move beyond surface level reforms towards genuinely evidence-based improvements. Crucially, the use of theory provides a shared language and analytical framework, allowing for meaningful comparison and adaptation of strategies across diverse institutional and national contexts. In this way, theory not only strengthens the rationale and effectiveness of educational strategies but also supports the sector's ongoing commitment to educational excellence and innovation.

### **1.3.2 The importance of discourse**

*“A discourse is a set of propositions about the world joined together by a set of connectives and relations that offer an account of an object or objects in the world.” Scott (2021, p.288).*

This section explains why the language used by universities is important and therefore why the analysis of language in the strategy documents is worthy of examination.

So where is “learning” and does it matter? The changes in the HE sector outlined above have also had an impact on the discourse. Biesta (2009) challenges the ‘learnification’ of discourse about education and claims it has led to some

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debates, such as the purpose of education and teaching, being marginalised. Biesta describes a number of semantic changes in the way 'learning' is used, suggesting this is evidence of "the rise of a language of learning" (Biesta, 2018, p.245). He criticizes this on two accounts, firstly that 'learning' refers to a process, and secondly that it is individualistic. However, others are concerned that learning is being obscured, for example Dafermos (2023, p.18) talks about learning being replaced by commercial concerns where "The neoliberal university landscape has become the site of novel fetishes such as 'excellence', 'top ranks', 'world-class', etc." The old ideas of a university as a place of learning and exploration are now eclipsed by very prescriptive learning outcomes and assessment matrices. This also represents a shift in responsibility from the student to the tutor who is now measured on KPIs and student feedback.

The transformation of language in higher education is therefore not merely a matter of semantics, it has significant implications for institutional values, behaviours, and identities. The adoption of terms such as 'student satisfaction', 'employability', and 'learning outcomes' in policy and strategy documents often signals a shift away from more holistic and exploratory notions of learning, towards a focus on measurable, short-term outputs. Sabri (2011) critiques notions of student experience and how this has removed other actors from the complex interactions inherent in learning. As noted by Hussey and Smith (2002) and Biesta (2009), learning outcomes in particular tend to offer a reductive and prescriptive view of learning, one that is at odds with the emergent, intangible nature of genuine educational experiences. Critical discourse analyses of UK learning and teaching strategies reveal that such texts are frequently impersonal, objectifying students and overlooking staff (Smith, 2008). Morley (2023, p.571) claims that "It is now well established that within contemporary university contexts, neoliberal managerialism diminishes scholarship, education, students, and academic staff". Furthermore, as mentioned above, policy constructions often portray university education as the production of employable graduates and students as partners or consumers, rather than as participants in a process of intellectual growth and transformation. These discursive shifts are rarely interrogated by those adopting the language, yet they fundamentally shape what is valued and how institutional identities are constructed. Thus, examining the

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use of 'learning' in strategy documents provides insight into the underlying priorities and assumptions that drive institutional behaviour and influence the experience of higher education.

If a student education strategy is designed to speak to a range of stakeholder, the discourse has important implications. Fairclough (2013) suggests that as structures in universities change, language changes. As the discourse of higher education has transformed over time it is both reflecting and influencing changes in the sector. As Fairclough (2010) asserts the language is not only shaped by social structures and contexts, but also is reciprocal in nature and can therefore influence the social context through identity formation, social relations and knowledge systems. Language traditionally associated with business environments is now common in universities such as: delivery, metrics, value-added, key performance indicators. The language used in strategy documents can therefore be significant for setting direction and designing policies; as Ball (2013, p.6) talks about the way "policy discourses work to privilege certain ideas and topics and speakers and exclude others."

I argue that in the current higher education climate, the language used in strategy documents and a robust defence of the intrinsic value of learning become more significant than ever. Universities face unprecedented challenges such as unsustainable funding regimes, disruptive technology and increasing globalisation. Firstly, considering current funding of HE which threatens the stability of the sector and is already driving substantial institutional change. These financial pressures risk narrowing the purpose of higher education to a set of market driven metrics, particularly employability outcomes, at the expense of fostering critical thinking, intellectual curiosity, and the broader civic and cultural functions that have historically defined the sector. If universities allow their strategic vision to be dominated by short term economic imperatives, there is a real danger of eroding the ethos of higher education and undermining its long-term impact for individuals and society.

At the same time, the rapid advancement of artificial intelligence (AI) presents both a challenge and an opportunity for universities. AI has the potential to

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fundamentally disrupt traditional methods of teaching, assessment, and even the very notion of knowledge itself, as generative technologies increasingly automate cognitive tasks once reserved for human expertise. In this context, universities must reclaim and reassert the value of learning, not merely as the acquisition of marketable skills, but as a process of developing critical, creative, and ethical capacities that remain uniquely human and endure in new educational and workplace environments with AI present. The centrality of learning must be reflected in the design and delivery of education, ensuring that strategy documents do not simply mirror prevailing economic or technological trends, but articulate a distinctive vision that safeguards the core purposes of higher education.

In addition to the challenges posed by funding pressures and rapid technological change, the increasing globalisation of higher education is a critical contemporary issue that further underscores the need to foreground learning in university strategy. Globalisation has transformed the sector, driving universities to engage in international collaborations, recruit students and staff from around the world, and incorporate global perspectives into curriculum and research agendas. This internationalisation brings significant opportunities, but it also introduces new complexities and increased competition. Universities can use the way they position language (for my purposes learning) to differentiate themselves in an often homogenised discourse. Increased geopolitical unrest, could further challenge traditional notions of the value of higher education and therefore these dynamics place additional pressure on universities to articulate a clear and defensible educational mission that transcends market imperatives and resists the reduction of learning to narrow outcomes.

In this context, the way universities use language in their strategy documents, and the extent to which they defend the broader purposes of learning, becomes even more significant. As higher education institutions adapt to new challenges and global trends, they must ensure that their strategic vision remains grounded in a commitment to critical thinking and intellectual development. Only by doing so can universities maintain their relevance and integrity in an increasingly challenging and competitive environment.

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The value of discourse, represented by the strategy documents in this study, is viewed as an insight into how the universities choose to portray themselves. Bleiker and Chou cite Nietzsche in a way that resonates with this point “when we say something about the world we also inevitably say something about our conception of the world – something that is linked not to the facts and phenomena we try to comprehend but to the assumptions and conventions of knowing that we have acquired over time and that have become codified in language” (Bleiker and Chou 2010, p. 9). So the language used will offer a view of what is seen as important but also goes further in shaping that environment.

Saarinen (2008, p.719) suggests “language does not describe social processes and structures but creates and supports them”. In this way, if programmes and courses of study are designed to align with the strategy of the university, the strategy will influence the learning environment and the design and delivery of learning and teaching. Collini (2017) argues persuasively that the way we discuss universities is important, and that the categories we draw on are inherently related to our experience. Alternatively, if the strategy does not inform the design of programmes, it becomes merely rhetoric and fails to help members of the university and external stakeholders to judge the approach to learning and teaching within the organisation.

### **1.3.3 Rationale for a cross-cultural approach**

*“Explicit comparison has been under-utilized in case study work, and more broadly, in qualitative research...comparison allows us to make stronger arguments for the significance of our research.” Bartlett and Vavrus, (2016 p.15)*

This section explains the international context for the research and justifies the relevance of comparing universities in different national environments.

An international dimension is included in this research to consider whether differences exist depending on the contexts for HE. As mentioned above, there are a range of features which influence the environment within which a university operates. This study undertakes a comparative approach in three very different contexts as a way of investigating the issue in different environments and

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exploring whether a very different macro climate reveals differences in the way learning is positioned. The international documentary analysis of a sample of strategy documents investigates different higher education environments. These contexts are important to understanding the web of significance for the universities under analysis. The study therefore adopts some of the principles of thick description, which is relevant for the purpose of interpretative analysis in cross cultural settings and sets out a detailed case study of each country.

The three cases are focused on the macro context in each of these settings and each case is made up of a sample of eight individual universities. Collectively these are taken to represent the case. The rationale for the choice of contexts is their distinctive and contrasting nature (this will be explored in more depth below). By comparing and contrasting three different settings this offers an insight into issues about global higher education. By looking beyond one national context the research speaks to Tight's (2021b) call for educational researchers to think and act more globally and internationally.

#### **1.4 The research design**

This section gives a brief overview of the design which is explained further in chapter 5.

Three contexts have been selected to represent different HE environments: Norway, with significant public management and control, an egalitarian system with no student fees at public universities; the American Elite, a traditional and elite system, research intensive and highly-selective; South Africa, which offers a perspective on a system with much lower participation in higher education.

The study explores twenty four strategy documents, (eight from each of the three different settings) to investigate how universities position learning in these documents. The language used to describe the strategy of universities offers a view of how they position their role and their espoused priorities. A thematic analysis of the published strategy documents explores the way "learning" is positioned in the documents and identifies explicit and/or implicit references to learning theory.

<b>Research Question</b>	<b>Method of Assessment</b>
RQ1 – What does an analysis of university strategies tell us about the role of modern universities?	Thematic analysis of university strategy documents using 3 broad questions
RQ2 – Are underpinning learning theories evident in the published student education strategies of universities?	Drawn from the thematic analysis in RQ1
RQ3 – How do universities position “learning” in their strategy documents?	Concept analysis of the way “learning” is positioned
RQ4 – What does a comparative analysis reveal in 3 distinct contexts?	Comparison of results in 3 contexts

#### **1.4.1 Scope and limitations**

*“As social constructionists, we do not have the right endowed by possession of a final truth. But we do have the right that all people, in principle, have to intervene in democratic debate with a truth that can be discussed, in order to further our visions for a better society.” (Jorgensen, and Phillips, 2002, p. 211).*

There are detractors to a contention of the importance of strategy. Strategy is seen as part of a managerialist approach (Clegg and Smith, 2010) and it is important to recognise that although these strategy documents are in the public domain, the extent to which they influence the thinking of stakeholders of the universities is not explored. However, the study does not seek to claim that these documents represent practice, rather that they are one source of discourse within and about the universities.

Whilst the diversity of the universities studied is a strength, this also creates a limitation as the style of documents varies considerably, even to the extent of whether student education is explicitly labelled or embedded within a wider strategy. The corpus is therefore not uniform and like for like comparisons cannot be achieved. The approach to managing these differences is explored in the methodology but the potential influence of style must be acknowledged.

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The choice of contexts, the choice of universities within those contexts and a single researcher's interpretation of the texts all contribute to a particular set of findings. An exploration of different universities, different discourse within those institutions, or a different methodological approach might surface alternative perspectives. For this I make no apologies, I seek to contribute to a debate and champion the importance of learning, but welcome counter views. Section 5.2.6 has further discussion of the limitations.

#### **1.4.2 Significance of the study**

This study makes an important contribution to the literature in two ways. Firstly, by examining the strategies of three very different groups of universities. In a comparative case study approach, three distinct contexts are explored. The rationale for the choice of contexts is their distinctive and contrasting nature (this will be explored in more depth below). By comparing and contrasting three different settings this offers an insight into issues about global higher education. There is value in international research, critiquing and contributing to existing debates about the role and purpose of universities. Secondly, by viewing the strategies through a different perspective, adopting a conceptual lens of learning theories. Rather than a view of strategy as a management process it focuses more in-depth on the underpinning approach to learning evident in the documents. This offers an insight into the importance of language in strategy documents and makes learning a central consideration in the analysis. I argue that learning theory has an important role to play in shaping the work of universities and how the discourse of learning and teaching is influential in this regard. This also offers a common language for the comparison in different contexts where the policy, funding, pedagogic and institutional settings will shape the purpose and content of the strategy documents.

#### **1.5 Outline of the Thesis**

Chapter 1 has introduced the research and background to the different aspects of the study.

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In chapter 2 I explain the theoretical lens used and justify why learning theory provides a helpful conceptual framework for the study. It includes an overview of different theories to create a framework for detecting both explicit and implicit theoretical alignment in the strategy documents. I argue that the use of theory provides a shared language and analytical framework, allowing for meaningful comparison of strategies across diverse institutional and national contexts.

In chapter 3 I discuss the importance and influence of strategy documents and argue for the value of more comprehensive, comparative, and thematically diverse research to examine how universities articulate their strategic intentions, particularly in relation to teaching and learning. I propose that this type of research can help us appreciate the complexities and possibilities inherent in university strategy.

In chapter 4 I provide background to the three national HE contexts to demonstrate the distinctive and contrasting nature of each setting. This supports the rationale for the choice of contexts and explains features of the macro environments that will be returned to in the comparative analysis particularly for RQ 4: How does the positioning of learning compare and contrast in three international contexts.

In chapter 5 I explain the research design and methods, justifying the importance of international documentary research and the approach to analysis adopted in this project.

In chapter 6 I explore the findings demonstrating a broadly shared conception of universities' core purpose; minimal explicit theoretical references but implicit alignment with established learning theories in the strategy documents; and I propose a typology of learning identities.

In chapter 7 I synthesise my findings with extant research, noting a confident and ambitious narrative within university strategy documents and the advantage of a strong learning identity.

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Finally chapter 8 draws the thesis to a close with my conclusions and reflections on the relevance of the research for future research and practice.

### **1.6 Summary of the argument presented in this chapter**

This chapter introduces the rationale for the study and proposes that international research of this nature contributes to our understanding of global HE, strengthens the discourse of learning, and helps develop an understanding of the role of strategy documents and their explicit or implicit conceptual underpinnings.

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## **Chapter 2: The theoretical lens: A review of learning theory in educational settings**

### **2.1 Introduction to the chapter**

Learning theory, whether consciously or not, underpins all educational design and delivery because the philosophy of education, what we believe about how people learn, influences how we chose to teach. Learning theories in higher education have evolved significantly since the early 20th century, providing valuable insights into how adults acquire and process knowledge. This chapter will explore key learning theories relevant to higher education, their development, and their implications for teaching and learning practices. I argue that organising these theoretical perspectives into a structured overview establishes a lens through which we can identify overt and underlying theoretical orientations within the strategy documents, while also acknowledging that these approaches often intersect and that institutional strategies typically blend multiple ideas. The themes that emerge from the analysis will be compared to these theoretical perspectives to identify both explicit and implicit connections.

In the scope of this project, learning theory is taken to mean theories that help us understand how people learn, out of scope is the wide body of research exploring aspects related to HE practice. [Appendix A](#) includes a brief definition of learning, this chapter then explores why learning theory is important, it provides a timeline of theory development, and an outline of relevant theories before summarising the key points for this study.

### **2.2 Why is learning theory important for universities**

*“genuine learning theory is about how learning takes place and functions in various situations and conditions” Illeris (2016, p.31).*

Debates about the necessity and relevance of learning theory date back to Skinner’s (1950) question about whether such theories are required at all. Alongside a proliferation of models since then, scholars continue to emphasise the importance of theoretical grounding in educational practice. Yilmaz (2011) highlights the role of learning theory in shaping effective teaching by illuminating

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different dimensions of the learning process. Gouthro (2019) likewise underscores the need to sustain theoretical discourse to guide curricular design and pedagogy, arguing that a strong conceptual foundation supports educators in selecting appropriate strategies across diverse contexts. Similarly, Brookfield (2004) maintains that theoretical frameworks enable educators to articulate and justify their pedagogical choices.

Gouthro (2019) sums up a number of compelling points about the value of theory for higher education:

- So the complexity of teaching and learning processes are understood by both educators and students
- For scholarly inquiry to be underpinned by theoretical analysis
- Theory of how adults learn can inform pedagogy and curriculum design

However, whilst some commentators have stressed the importance of this theoretical underpinning, there appears to be a dearth of application. As Illeris (2016, p.31) states “internationally, there is a fundamental and rapidly growing need for a better understanding of how learning functions and can be improved. But currently, the learning theory seems to be neglected or conceived as an exclusive domain of speculations with no practical implications, where a specific kind of economic understanding has become the final goal and yardstick of all arrangements and activities of the educational sector and its institutions and programmes.” Relatedly, Hattie and Donoghue (2018, p.98) observe that teacher education programmes focus on the delivery of content and “the teaching of ‘learning’ has diminished to near extinction”.

Educators inevitably hold implicit beliefs about how they design and deliver learning, yet the extent to which these beliefs are shaped by evidence remains uncertain. Illeris (2018) suggests conversations about learning and design of educational activities is dominated by assimilative learning. There’s also a wide range of literature about ‘new’ approaches to teaching, often saturated by small case studies where tutors adopt a particular approach for a class or subject. But

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what of an understanding of underlying philosophy and a more strategic approach? Whilst some recognise the value, there have been concerns raised about the lack of sufficient attention to theoretical concerns. For example, talking about adult education Gouthro (2019) reflects on a reduction in the attention applied to theory.

I argue that learning theory provides HE with a solid foundation for effective teaching and learning practices. Educational theories offer frameworks that enable educators to design and implement evidence-based instructional methods, moving beyond traditional approaches based solely on content knowledge or intuition. Learning theories help explain the underlying mechanisms of learning, and allow for testing and refinement of teaching methods, fostering a synergy between research and practice that leads to continuous improvement in educational approaches. By grounding their practice in established learning theories, educators in higher education can create more effective, engaging, and adaptable learning environments that cater to diverse student needs and promote deeper understanding.

I acknowledge that no single theory or set of principles can capture the complexity of learning, however Merriam's (2018, p.94) point supports a strong rationale for a better understanding: "The more we know about how adults learn, the better we can design learning activities that facilitate learning and the better we can prepare adults to live full and engaging lives in today's world." Further, Illeris (2016, p.31) states "internationally, there is a fundamental and rapidly growing need for a better understanding of how learning functions and can be improved." It is this need for understanding learning that underpins the rationale in this study for analysis the strategy documents using learning theory as a theoretical lens.

### **2.3 Developing a theoretical framework**

*"Your theoretical framework is the set of beliefs about psychological and social processes with which you approach your research study." Auerbach and Silverstein (2003, p.46).*

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Learning theory is used in this study as a diagnostic tool to understand and interrogate the university strategies. It is seeking the theoretical evidence for the positions adopted in the documents. I am not therefore making judgments about the relative value of different theories, rather developing an understanding of the field of learning theory to inform the analysis. Tight (2012) talks about theory providing a conceptual framework to help explain findings. This study relies on detecting implicit or explicit theory as an evidence base for the strategic positioning of learning in the documents. Explicit references are obviously easier to detect but even where theories are unnamed, they reveal institutional perspectives and values related to learning. To inform the study, I therefore conducted a review of key learning theories. This is deliberately kept broad to understand the wide body of research in this area so it can be aligned to the conceptualisations of learning emerging from the analysis. The next section therefore provides an overview of key theories for higher education. Whilst it mentions seminal learning theories, it places more attention on those relevant to adults rather than child or animal development. This overview synthesises key learning theories to establish a reference framework to be used following the thematic analysis for analysing their implicit or explicit presence in higher education strategy documents. Core principles are highlighted to enable easier cross referencing in the analysis stage against the discourse in the strategy documents. It aligns to the purpose of this study and is not presented as a wider representation or categorisation of learning theories. The information is presented as a timeline because early learning theories are influential to the development of more contemporary positioning and debates about learning.

#### **2.4 A timeline of learning theory development**

*“Multiple learning theories and models on pedagogy and andragogy represent a jungle of concepts that can be confusing, conflicting, and not fully validated by substantial research.” Minter (2016, p.7).*

Learning theory has been studied since the start of the twentieth century with early studies focused on animals (including work by Skinner, Pavlov and Köhler) and then an interest in developmental stages focused on children (such as work

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by Piaget and Bandura). Later in the century social and situated learning theories were developed. Further attention to adult learning has developed in fields of lifelong learning and adult education (drawing on theorists such as: Knowles, Kolb, Honey and Mumford, Lave and Wenger). The three main learning theories are often viewed as Behaviourism, Cognitivism and Constructivism (Bélanger, 2011). However, other classifications have also been proposed, for example, Merriam and Caffarella (1999) advance five major theoretical orientations: behaviourism, cognitivism, humanism, social learning, and constructivism. Bart and Wong (1974) propose a helpful continuum of learning theories, with nativism at one end of the spectrum (based on the learner's innate capacities) and environmental at the other end (focusing on the role of environmental factors). In between these two ends is interactionism. Behaviourism would be at the environmental end and cognitive learning theories at the opposite nativism end. Seeing this as a continuum of learning theories enables us to add more recent theories to their work reflecting the balance between the environment and the individual learners' characteristics.

Whichever classification is used, there are areas of overlap and contradictory views about categorisation. While these learning theories have varying levels of empirical support, they all contribute valuable insights to our understanding of learning processes. The field of learning theory is complex, and researchers and educators often use theories as frameworks for further investigation and practical application, rather than as definitive explanations of learning. Despite the complexity, an appreciation of learning theories can underpin a more comprehensive understanding of learning processes and can therefore lead to more effective educational practices and is thus included as an important underpinning for the analysis.

[Appendix A](#) explains the origins of the seminal theories in Behaviourism, Cognitivism and Constructivism. Later in the 20th century, researchers further developed both social and situated learning theories, emphasising the importance of context and social interactions in the learning process. This has also included consideration of adult and lifelong learning as opposed to learning in children and has produced several influential theories, recognising the

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distinctive characteristics and needs of adult learners, such as self-direction, prior experience, and practical application of knowledge.

Early work on experiential learning began to receive attention in the 1970s, with Kolb initially considering learning styles and then developing this work by proposing an experiential learning theory and his highly influential cycle in 1984. Kolb credits the work of Dewey, Lewin and Piaget as the intellectual foundation of his idea (Kolb et al, 2014). Experiential learning theory portrays learning as “the process whereby knowledge is created through the transformation of experience.” (Kolb, 1984 p.41 cited in Kolb et al, 2014). Experiential and active learning are closely related concepts in education, both aim to engage students more deeply in the learning process, but active learning is a broader umbrella term that can include various methods, while experiential learning is a more specific approach based on a particular theory and cycle of learning, requiring hands-on experiences and real-world application of concepts, followed by reflection and theorising. Active Learning as a broader concept encourages learners to engage directly with the material through discussions, problem-solving, and hands-on activities. The terms used here are prevalent in HE practice and may therefore be more directly cited in the documents, noting approaches to experiential, active or reflective learning practices.

Merriam (2018) contends there are three foundational theories of adult learning, andragogy, self-directed learning and transformative learning. Firstly, addressing the concept of andragogy, Knowles developed his ideas of andragogy, which places learners in partnership with educators to become self-directed in their learning (Knowles et al., 2015). Knowles described characteristics of adult learners and suggested a continuum moving from teacher-directed pedagogy to student-directed andragogy (Merriam, 2018). Andragogy is projected as a process model which places learners in partnership with educators to become self-directed in their learning (Knowles et al., 2015). Proposing an extension of this, Hase and Kenyon (2013) develop a concept of heutagogy offering greater learner control, so whilst andragogy gives learners control over contextual factors, heutagogy enables learners to decide what, when and how to learn, and even the measures of success. Several prominent concepts in adult learning

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theory can be seen to link to these ideas, for example, self-directed learning which emphasises the learner's ability to take initiative and control over their learning process. Knowles' ideas are credited as the basis of self-directed learning which the Board of Directors for the International Society for Self-Directed Learning define as "Self-directed learning is an intentional learning process that is created and evaluated by the learner." (ISSDL, 2020). Self-directed learning which has become a widely used term first emerged in the field of adult education in the 1960s and 1970s. Tough is credited as an early proponent of the concept (Loeng, 2020). The main focus is on the importance of the learner taking control. Tools have been developed to measure the extent of self-directedness and this has been shown to link to more successful outcomes, including in an online context (Merriam and Bierema, 2014). Terms such as andragogy would be unlikely to appear beyond dialogue amongst academics but notions of self-directed or independent learning are certainly features of traditional approaches to higher education and could feature in the strategy documents.

Mezirow began developing the notion of transformative learning in the late 1970s, first publishing an article on the concept in 1978 and categorising it as a constructivist adult learning theory (Bélanger, 2011). His theory focuses on how adults can change their perspectives and world views through critical reflection and discourse. Mezirow defines transformative learning as "the process by which we transform problematic frames of reference (mindsets, habits of mind, meaning perspectives) – sets of assumptions and expectation – to make them more inclusive, discriminating, open, reflective and emotionally able to change." (Mezirow, 2018, p.116). He highlights the role of critical self-reflection and reasoning in the learning process. Transformational learning theory essentially focuses on how learners critically reflect on their assumptions and beliefs, leading to fundamental changes in perspective. Merriam (2018) suggests a distinction between transformative learning theory and the previously discussed andragogy and self-directed learning, in that the former focuses on the cognitive process whereas the latter focus on the learner's characteristics. She also contends that all three of these theories have been criticised for not paying sufficient attention to political and social contexts for learning (Merriam, 2018). Critical reflection and

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critical inquiry are terms heavily associated with university education and would likely feature in the way universities describe their identity. The extent to which these terms are used ubiquitously and with a common meaning will be examined. Similarly, transformative learning is a common university narrative but whether this is rhetoric or recognises the theoretical underpinning will hopefully emerge.

Shifting attention from the individual to the social context of learning has led to further developments of social learning theory, introducing ideas such as collaborative and cooperative learning. These two concepts are sometimes used interchangeably but Yang (2023) claims they were developed separately, although both within the same time period of the 1960s and 70s; the former derived as a broad framework in HE to encompass a range of approaches to small group learning, the latter a more structured approach with a strong emphasis on interdependence and accountability aimed more at school age children. A distinguishing feature is the interdependence in discovering learning in collaborative approaches in contrast to cooperative approaches where activity may be more tightly controlled by the teacher (Davidson and Major, 2014). Bruffee (1984) attributes the origins of collaborative learning to Abercrombie in 1964, where her research with medical students found that they achieved better learning outcomes working in small groups than in working alone. Bruffee (1981) describes collaborative learning as an interactionist pedagogy where explaining something to others helps develop understanding. He explains “Collaborative learning personalizes knowledge by socializing it, providing students with a social context of learning peers with whom they are engaged on conceptual issue” (Bruffee, 1981, p.745). Johnson and Johnson (2009) claim a move from individualism to a receptiveness of cooperative learning techniques began in the 1980s although they suggest the origins were in 1966 with trainee teachers. “Cooperative learning is the instructional use of small groups that allows students to work together to maximize their own and each other’s learning.” (Johnson et al 1994, p.3). Collaborative learning may be more likely than cooperative to appear in universities’ narratives. In a system of individual outcomes it will be interesting to see the way the value of learning with others is positioned.

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Another area where context has been considered as significant, is the research on situated learning which started to appear during the 1980s leading to a key text by Lave and Wenger in 1991 introducing the notion of Communities of Practice. Lave (1991) calls for a rethinking of our understanding of learning to include social, cultural and historical factors. In her later work Lave emphasises learning is “an effect and source of social change” (Lave, 2019, p.1). Merriam (2018) claims the term “learning community” and “Communities of Practice” are often used interchangeably, the former in educational settings and the latter in organisations. The concepts recognise the power of collaborative and informal learning which emerge organically through the development of a shared identity and relationships in social contexts. Wenger (2018, p.220) proposes a social theory of learning where “learning is, in its essence, a fundamentally social phenomenon” and includes the following components: meaning, practice, community and identity. Other notable work on informal and incidental learning focused on workplace learning was a model by Marsick and Watkins initially developed in 1990 but subsequently modified (Marsick, 2001). The community of practice notion is perhaps easier to understand in an organisation where people are working towards a common goal, but the learning community perspective could be drawn upon as a way of designing learning environments in the settings. Both social and situated learning theories could be represented in the documents with an emphasis on co-creation, collaborative learning environments, peer learning opportunities, or staff student partnerships.

It is appropriate to acknowledge that many of these theories of learning represent a Western understanding, based on the dominant research traditions (Merriam, 2018). Interesting work from other cultures is now emerging which can broaden our understanding, and challenge some of the limitations of existing beliefs. Merriam and Kim (2008, p.72) assert that “the dominance of Western knowledge has resulted in nonattention to, if not outright dismissal of, other systems, cosmologies, and understandings about learning and knowing.” Other traditions draw attention to a stronger emphasis on: communal rather than individualistic learning; the importance of informal and lifelong learning; holistic and moral learning orientations; all of which can enhance our understanding of learning and are increasingly important in a more globalised society (Merriam and Kim, 2008).

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Opening up our understanding of learning in different contexts introduces ideas about learning outside of formal settings, for oral learners engaging in relational and connected learning (Thigpen, 2020); similarly, affective and emotional dimensions of learning (Linnenbrink-Garcia, Patall and Pekrun, 2016.) or through exploring metaphoric concepts of learning in different cultures (Berendt, 2008). It also challenges some of the assumptions in extant research, for example, Nah (1999) in her research with female Korean leaders challenges the hegemony for self-directed learning, underpinned by autonomy and independence, when other cultures place higher value on collaboration, interdependence and collectivism. This is echoed by Kang and Chang (2016) who examined learning from Confucius cultural perspective compared to Western contexts. So it is important to reflect on the influence of history and culture in our understanding of how and what people learn. These different representations could be reflected in strategies with an emphasis on inclusive pedagogies, global perspectives, decolonizing the curriculum, citizenship and wider ethical approaches to diverse learning. It will also be interesting to see if different philosophical underpinning reflect the different national contexts in the study.

Presenting an overview of different theories in this way creates a framework for detecting both explicit and implicit theoretical alignment in the strategy documents but it is also necessary to recognise the overlap between different approaches and the likely integration of paradigms in the university strategies. Reflecting on the breadth of theory development that took place towards the end of the nineteenth century, Illeris (2016) tried to draw together a comprehensive understanding of human learning. He created a learning triangle, a constructivist model which identified three dimensions of learning (content, incentive and environment) and claimed that these will always be involved in learning and that to understand learning processes all three of the dimensions must be considered. Illeris (2016) submits that educational activity and indeed conversations about learning focus on assimilative learning but that processes of assimilative, accommodative and transformative learning are all required. He also acknowledges the fundamental role of accommodative or transcendent learning to overcome barriers and resistance to learning and break down and reconstruct prior learning and existing beliefs. The use of a neutral stance on learning theory,

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as opposed to adopting a particular theoretical position, will hopefully allow for these combinations, overlaps and reframing of theories to be surfaced. The synthesis of learning theories with the themes emerging from the analysis will enable the detection of both explicit and implicit theoretical alignments in strategy documents, accounting for the inherent integration of paradigms in higher education practice. This offers a learning theory lens which is therefore multi-theoretical and potentially hybrid, and will aid identification of explicit signals through direct references (e.g., "Vygotskian scaffolding" or "transformative learning objectives") that demonstrate intentional theoretical grounding, but also implicit traces revealed through linguistic and structural choices, such as behaviourist indicators in standardised assessment frameworks or constructivist undertones in rhetoric about "co-created curricula" without participatory mechanisms. Further, the analysis could detect conceptual coherence, or misalignment, between stated objectives and pedagogical assumptions.

[Appendix A](#) shows an overview of the learning theories contained in this discussion. This is not an exhaustive list; they are selected based on relevance to the research questions to provide an underpinning for a discussion of learning theory in the strategy documents under examination.

## **2.5 Summary of the argument presented in this chapter**

There are a wide range of learning theories presenting a complex terrain for educators. The field is also continually evolving with different views about the validity and applicability of different perspectives to higher education. The range of theories outlined above continue to inform educational research and practice, promoting student-centred environments and emphasising the active role of the learner and the importance of social context in education, challenging traditional notions of knowledge transmission. Key theorists such as Dewey, Vygotsky and Piaget have inspired numerous contemporary educational approaches, including collaborative learning, inquiry-based and problem-based learning. All focus on the active role of the learner and the term active learning is being used widely in discussions of moving away from more traditional styles of knowledge transmission in universities. I argued that organising these theoretical

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perspectives into a structured overview establishes a lens through which the study can identify both implicit and explicit theoretical orientations within the strategy documents. The understanding of the breadth of theoretical positions is therefore an important underpinning for the analysis in this study.

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## **Chapter 3: Strategy in Higher Education**

### **3.1 Introduction to the chapter**

This section of the literature review will explore the role of strategy in higher education and the importance of how this is articulated in strategy documents. The purpose of this chapter is to demonstrate the importance and influence of the strategy documents under examination in the study. I argue for more comprehensive, comparative, and thematically diverse research to examine how universities articulate their strategic intentions, particularly in relation to teaching and learning. I propose that this type of research can help us appreciate the complexities and possibilities inherent in university strategy and reclaim the discourse for the benefit of the sector and society at large. I argue that it is imperative to reclaim and critically examine the discourse surrounding universities, moving beyond reductive notions of value for money to consider the broader societal, intellectual, and civic roles that universities play.

This chapter begins with a brief overview of strategy in higher education, then discusses the specific role of learning and teaching strategy, it then explores extant research in the area of strategy documents before summarising the key points for this study.

### **3.2 Strategy in Higher Education**

*Fumasoli and Lepori (2011, p.157) position strategies “as instruments by which universities manage their organizational processes and deal with their environments in order to select a portfolio of activities and find an appropriate position in the higher education system”.*

The articulation of strategy in higher education is a process through which universities define their identity, articulate their core functions, and position themselves within a constantly evolving sector. The strategy documents at institutional level function as more than operational plans. They articulate how individual universities understand their role, justify particular priorities, and respond to internal and external pressures, whilst also signalling shifts in institutional positioning over time. In this way, they provide insight into the way

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universities interpret and enact their strategic purpose within specific contexts. When these strategy documents are considered collectively, their analytical value extends further. Rather than just representing an individual institution, when analysed as a group they can provide insights into the higher education sector, the national context or the setting under investigation. This may surface dominant narratives, wider trends, shared priorities or levels of differentiation. This might include the influence of national policy frameworks, funding arrangements, sector-wide expectations, changes over time, economic imperatives and sector level trends. I argue that the documents say more than the current plans of an institution, they tell us about the role and purpose of a university or taken collectively, the wider higher education sector. The analysis of strategy documents therefore contributes to the discussion about the role of universities introduced in section 1.3.

As the focus of this research is the way learning is positioned within the documents, I argue that university strategy documents, by shaping and reflecting the discourse of 'learning', play a crucial role in either homogenising institutional identities or, conversely, enabling universities to differentiate themselves through distinctive educational visions. The way universities conceptualise and communicate learning in their strategies is therefore central to understanding both their public image and their internal coherence.

The strategy represents a relationship between the organisational identity and dynamics, and the external environment, which allows for an active role for the institution in shaping their position (Zipparo, 2023). As Stensaker et al. (2019) note, these plans are public statements that advance an institution's legitimacy and position for the future, while Sutphen et al. (2019) highlight their role as one of the few official channels through which internal and external stakeholders can understand how universities intend to fulfil their obligations to society. They also argue that the documents can function as starting points for critical reflection, enabling staff and leaders to interrogate their practice and values, and they evidence this through examples from their own practice. These formal documents therefore offer a published expression of how the university chooses to describe its key priorities and plans. In this sense, strategies are not neutral;

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they are performative texts that construct and project an institutional identity, often under conditions of considerable external scrutiny and competition. Fumasoli, Pinheiro and Stensaker (2014) considered the role of organisational identity in these documents and highlight that organisational strategy in universities cannot be understood solely as a result of external pressures or managerial intent; rather, it is also shaped by internal organisational factors.

The rise of strategic planning in universities, which Peterson (2007) traces to the early 1980s, coincided with the ascendance of neoliberal economic discourses that have increasingly framed higher education as a marketised sector (Marginson, 2013). This shift has been accompanied by growing managerialism, as noted by Stensaker and Fumasoli (2017), and a focus on performance and measurement that Barnett (2011, p.15) describes as characteristic of an “age of explicitness.” Trowler (2010) suggests this is an ideological position, expressing and justifying particular power relations and similarly Olssen and Peters (2005) argue that new managerialism has fundamentally altered how universities justify their existence, prioritising economic imperatives and accountability over more traditional academic values. Such trends, as Ball (2013, p. 27) observes, have led to the “subordination of the purposes of education to economics,” a process he elsewhere terms ‘academic capitalism’ (Ball, 2017).

Despite the ubiquity of strategic planning, it is essential to recognise the sector’s diversity and the consequent variation in how strategies are formulated and enacted. As Stensaker et al. (2019) point out, universities differ in size, resources, regulatory environment, and mission; this heterogeneity is often obscured by homogenising discourses. Individual strategies can thus serve to distinguish institutions within an increasingly broad and heterogeneous sector, for example, Temple (2018) proposes that the strategy can focus on increasing the size of the cake, that is, encouraging more students to come to universities, or on growing market share, so encouraging more students to select the particular institution. Moreover Keller (1983) in his highly influential book about academic strategy emphasises the active role of leadership in shaping institutional strategy, the importance of responding to external changes, and the need for competitive positioning. Morphew, Fumasoli and Stensaker (2018) add

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that strategic plans not only outline goals and resource allocations but also signal an institution's aspirations and values. Meanwhile, Zipparo (2023) highlights the potential for strategies to foster unity and consensus across an institution, though this is not always realised in practice.

However, the capacity of high level strategy to shape institutional behaviour has been questioned. Bastedo (2007) cautions against overly rational interpretations of strategy, pointing to the influence of cultural and environmental factors that can override centralised planning. This is echoed by Stensaker and Fumasoli (2017), who found that research-intensive universities sometimes reject or ignore institutional strategies in favour of local priorities. These findings underscore the complex interplay between centralised strategy and local agency, as well as the ongoing tension between institutional identity and external pressures.

This overview demonstrates that strategy documents are not simply administrative artefacts but are central to the construction and communication of institutional identity in higher education. The way 'learning' is positioned within these documents, either as a generic, marketised concept or as a distinctive, mission led process, has profound implications for universities' ability to articulate their core functions and set themselves apart in a competitive environment. As Willetts (2017) contends, universities' behaviour is shaped by their environment and its inherent incentives. These features vary depending on the national education system within which the university resides and the extent of differentiation within that system. Funding and ethos will clearly be significant characteristics. One example is those focused on equality of access with others more competitively positioned and highly selective. A traditional, highly selective, elite university is based on a very different philosophy to a university focused on widening access and equality of opportunity. This philosophy would surely impact the positioning of strategic aims, the approach to teaching and learning, the priorities set and the allocation of resources. The policy, funding, pedagogic and institutional settings should therefore shape the purpose and content of the strategy documents. By critically analysing these documents, we can uncover both the explicit and implicit ways in which universities seek to define themselves and their relationship to the broader sector.

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### 3.3 Learning and Teaching Strategy

*“Education strategies represent to a greater or lesser extent an institution’s educational ethos and provide the institution with an opportunity to articulate priorities, processes and what makes their institution unique.” (Winstone, 2022, p1111).*

The positioning of learning and teaching within university strategy documents is central to how institutions articulate their educational mission and signal priorities to both internal and external stakeholders. In my research, I argue that analysing the treatment of teaching and learning within the main university strategy (rather than as separate documents) provides a more consistent and meaningful basis for cross institutional and international comparison. This approach not only addresses the pragmatic reality that dedicated learning and teaching strategies are not universally available but also captures the true strategic weight given to education in the institution’s main strategic document.

The positioning of strategies relating to learning and teaching warrants further research. If programmes and courses of study are designed to align with the learning and teaching strategy of the university, the strategy will influence the learning environment and the design and delivery of learning and teaching. Alternatively, if the strategy does not inform the design of programmes, it becomes merely rhetoric and fails to help members of the university and external stakeholders to judge the approach to learning and teaching within the organisation. There are a wide range of learning theories and constructs applied to the process of teaching and learning and it is unclear to what extent these are considered in the development of learning and teaching strategy or articulated in the published documentation.

While previous research, such as that of Gibbs, Habeshaw, and Yorke (2000), has demonstrated the value of dedicated teaching and learning strategies in raising the profile of education, directing investment, and communicating priorities to stakeholders, such documents are not uniformly present across higher education systems. In some national contexts or individual institutions, distinct learning and teaching strategies are defined, but this is by no means

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standard practice. As a result, the content and status of teaching and learning within broader university strategies varies significantly, reflecting different policy environments and institutional priorities.

My initial intention was to analyse learning and teaching strategies, but the shift in focus from standalone teaching and learning strategies to the relevant sections within main institutional strategies is not just pragmatic. It acknowledges the inconsistency in the availability of dedicated education strategies across different countries and institutions, and it ensures that the analysis is grounded in the core strategic documents that set out the university's overall vision. This approach allows for a more consistent comparison of how institutions position learning and education, irrespective of national policy constraints or the existence of separate strategy documents.

Moreover, by concentrating on the main strategy, the study is able to assess how teaching and learning are integrated or otherwise, within the institution's broader priorities. The discourse around learning and teaching in these documents is not only significant for internal planning and resource allocation but also functions as a public statement to external stakeholders about the institution's commitment to educational quality and innovation. As discussed above, this is particularly important in a sector increasingly defined by competition and accountability.

Despite the value attributed to teaching and learning strategies in specific contexts, such as the UK, as demonstrated by Gibbs, Habeshaw, and Yorke (2000), Smith (2008), Clegg and Smith (2010), and Newton (2003) who all produced interesting studies in this area, there remains a notable gap in comparative research that spans different national and institutional settings. My study addresses this gap by adopting a consistent analytical lens, ensuring that the analysis reflects the true strategic positioning of learning and teaching within universities, regardless of their local policy environment or the availability of standalone education strategies. This approach not only enhances the comparability of findings but also provides a more holistic understanding of how universities articulate and prioritise education in an era of globalised higher education.

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### 3.4 Extant research on Strategy Documents

*“For the most part, studies on strategy have provided theoretical perspectives and empirical research in the business literature, but there is limited research in the context of higher education” (Mahat and Goedegebuure, 2016, p.224).*

A growing body of research recognises university strategy documents as critical statements of institutional intent, reflecting what universities value and how they position themselves for the future. Studies have examined a range of aspects, from the content and structure of strategies to their role in organisational identity and change management. For example, Winstone’s (2022) study explored how UK universities conceptualise feedback by analysing education strategy documents. While the main focus of her study was on the positioning of feedback, there were also relevant findings about the documents more broadly, such as the high-level nature of intention they contained rather than a detailed guide for practice and the way they may indirectly shape practice by normalising certain assumptions and subtly reinforcing traditional teacher-led models. Other key researchers in this field include Stensaker and Fumasoli (2017) who examined the dynamics between institutional and sub-institutional strategies, highlighting how overarching plans set objectives that are then operationalised at various levels.

Despite this interest, the extant research is geographically and thematically limited. The majority of studies are concentrated in the UK (see for example: Evis, 2023; Hill and Smith, 2023; Kinchin, 2022) and Australia (see for example: Snyder, Marginson and Lewis, 2009; Cummings, 2005; Fox and Diezmann, 2020) with a smaller number of national case studies in other European countries such as Norway and Ireland. For instance, Sandvoll (2015) examined how stakeholders at a Norwegian university perceived the impact of a teaching and learning strategy three years after it was introduced. Findings indicated that introducing a strategy had not impacted teaching and learning activities, although it had stimulated some discussion in this area. Another study looked at 6 Norwegian universities but with a specific focus on continuing education and market demand (Brandt, 2002). Similarly, analyses of strategy documents in the

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Republic of Ireland have highlighted significant deficits in planning for institutional diversity and external stakeholder engagement (Lillis and Lynch, 2013), underscoring the complexity of strategy development in higher education. In Turkey, Cevher and Yuksel (2015) analysed strategic plans of a large number of public universities to identify strengths, weaknesses, opportunities, and threats. Australian research has looked at teaching and learning partnerships (Fox and Diezmann, 2020) and change management in teaching and learning (Cummings, 2005). The research by Gibbs, Habeshaw, and Yorke (2000) and others on teaching and learning strategies in the UK highlights the value of such documents in directing investment and communicating priorities, but again, these are largely confined to national contexts and do not offer cross cultural comparison.

While some interesting research exists, it tends to focus on specific themes rather than broader strategic phenomena. Methodologically, the literature is dominated by qualitative case studies, with few large scale or comparative analyses. This further limits our ability to generalise findings or to draw meaningful comparisons across institutions and national contexts. Technology emerges as a particularly prevalent area of inquiry, with studies examining technology adoption (Rulashe and Nkonki, 2017), the implementation of blended learning (Hill and Smith, 2023), and how technology is both framed and integrated into institutional visions (Matthews, 2021). Mission statements, as key components of university strategies, have attracted considerable scholarly attention. This area of research demonstrates that such statements serve to signal institutional priorities, emphasising training qualified workforces, research excellence, and, to a lesser extent, social responsibility. Some notable studies in this area include work by Seeber Barberio, Huisman and Mampaey (2019, p. 230) who talk about mission statements as “identity narratives, a type of symbolic representation of an organization”. Their study of 123 UK universities’ mission statements to understand how their content is shaped by organisational and institutional factors found that the universities shape their mission statements to balance external expectations and internal values, presenting identity claims that appear credible while remaining grounded in organisational realities. Outside of the UK, Arias-Coello, Simon-Martin and Gonzalo Sanchez-Molero (2018) studied 47 Spanish public universities and their study found that their mission statements largely

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emphasised teaching over research and societal engagement, particularly in newer institutions. A further example in Germany is a study by Jungblut and Jungblut (2017) who conducted a quantitative content analysis on the mission statements of 74 German universities and found a level of differentiation between an emphasis on either research or education, and a further difference where around half of their sample had much longer mission statements articulating more distinct institutional profiles. Despite these contributions, the empirical base for understanding the broader role of strategy documents remains underexplored, as Mahat and Goedegebuure (2016) observe in their critique of the field's reliance on descriptive case studies and single country analyses.

This suggests a paucity of research that critically analyses the discourse of learning and teaching in strategy documents, beyond their function as mission statements or on specific themes such as technology. This is despite the fact that strategy documents are increasingly used to shape institutional identity, guide resource allocation, and communicate educational priorities to a wide range of stakeholders. The absence of such research means that our understanding of how universities conceptualise and prioritise learning and teaching at a strategic level remains fragmented and context bound.

Even more stark is the absence of cross-cultural comparative studies in the literature about university strategy. Despite the recognised importance of university strategy documents as articulations of institutional priorities and educational ethos, the scholarly literature is overwhelmingly characterised by single country analyses, with a marked absence of cross cultural, comparative research. This gap is particularly evident in studies examining how teaching and learning are positioned within these documents across different national and institutional contexts.

Most empirical research to date has focused on national case studies, primarily from the United Kingdom and Australia with additional single country analyses (as mentioned above). This includes multiple universities within a single country, for example, Evis (2022) investigates interdisciplinarity in the strategic plans of eight British universities, while Fox and Diezmann (2020) analyse teaching and

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learning partnerships in five Australian universities, and Cevher and Yüksel (2015) conduct a content analysis of strategic plans from 90 Turkish universities. However, these studies are all confined to their respective national settings and do not engage in systematic cross-national comparisons.

Thematic reviews and empirical analyses further reinforce this pattern. Systematic literature searches using databases such as Scopus and Web of Science confirm the lack of cross-cultural studies. Despite thousands of documents referencing 'strategy' in higher education, only a small subset directly addresses university level strategy documents in relation to teaching and learning, and none provide comparative analyses across different national or institutional contexts. Doing forward and backward citation analysis also failed to find any cross-cultural research in this area. The studies that were identified throughout my literature search made important contributions to this field. For example, Morphew, Fumasoli, and Stensaker (2018) did a qualitative content analysis to review strategic plans of 19 public research-intensive universities in Northern Europe and North America. They found that universities respond differently to external pressures in their strategic plans: North American institutions tend to separate public and private priorities, while Northern European universities integrate them into a more unified focus on research excellence, highlighting varied approaches to strategic positioning. A similar study (with common researchers) focusing on the impact of globalising forces on higher education, Stensaker et al. (2019) compared the strategic plans of 78 universities across 33 countries to examine patterns of similarity and difference in strategic positioning. They found that institutional responses to globalisation differed by status and context, with higher-status universities placing a higher emphasis on global narratives, but that all universities drew on legitimisation strategies in their plans. However, these comparative studies are noticeable by their rarity.

This absence is significant, as it limits understanding of how diverse regulatory, cultural, and institutional contexts shape the articulation of teaching and learning priorities in university strategy documents. As a result, the literature remains largely silent on the comparative dimensions of strategic positioning in higher

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education, leaving a critical gap for future research to address. My study addresses these gaps by analysing sections within overall university strategy documents that relate to teaching and learning. This approach allows for a more consistent and comparable analysis across different institutions and countries, capturing how universities position learning and education as part of their core mission. By doing so, the study not only responds to the underutilisation of strategy documents as a research corpus but also contributes to a more nuanced and internationally relevant understanding of the strategic articulation of teaching and learning in higher education. This focus is particularly timely given the global pressures on universities to demonstrate accountability, innovation, and distinctiveness in their educational provision.

### **3.5 Summary of the argument presented in this chapter**

Strategy documents offer an insight to the stated goals and plans of universities. Whilst differences exist in style and scope, the presence of a university strategy is almost universal. As publicly available documents they offer a tool for examination and comparison across the higher education sector. Acknowledging that they represent one view of an institution, not necessarily reflective of practice, they still present a record of stated aims and what an institution values which proffers a meaningful text for analysis. Despite their crucial role in setting institutional direction and priorities, university strategy documents have not received commensurate attention in higher education research. The field is dominated by small scale, geographically limited studies, often with a narrow thematic focus. Most recent research has concentrated on components such as mission statements or specific themes like technology, sustainability, or the impact of COVID 19 on teaching and learning. There is a notable absence of systematic analyses that explore how teaching and learning priorities are articulated and enacted within these documents. I have argued that this narrow focus overlooks the broader, integrative role that strategy documents play in guiding core university function, importantly for this study, on teaching and learning.

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Geographically, research on university strategy documents is concentrated in the United Kingdom and Australia, with limited representation from other regions. This concentration restricts our understanding of how diverse cultural, political, and educational contexts shape the development and impact of strategy documents. Furthermore, the field lacks sufficient cross-cultural comparisons, leaving significant questions about the global diversity of strategic practices unaddressed.

Considering these gaps, this chapter argues for a more critical and comprehensive approach to the study of university strategy documents. By challenging prevailing narratives and scrutinising the content and function of these documents, we can better understand, and help to shape, the future direction of higher education. This study offers one contribution to this field.

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## **Chapter 4: The three case studies. An exploration of higher education in Norway, South Africa and the US**

### **4.1 Introduction to the chapter**

This chapter sets out the rationale for the choice of case studies and then discusses each context in turn. Introducing each case study in detail is essential for two main reasons. Firstly, providing contextual background for each national higher education system helps to position the unique circumstances, challenges, and philosophies that shape how universities formulate and present their strategies. Secondly, by making explicit the distinctive features of each context, including policies on access, student participation rates, economic inequality, and institutional stratification, I allow for a more nuanced understanding of the subsequent analysis. This thick description (Geertz, 1973) underpins the comparative nature of the research so rather than treating the cases as equivalent or interchangeable, it foregrounds the ways in which national histories, governing structures, and social conditions may influence strategic priorities. In doing so, I aim to strengthen the validity of the analysis and address a common challenge in comparative qualitative research by accounting for contextual variables that might otherwise confound interpretation. Thus, the detailed case overviews are not only descriptive but serve as an analytic foundation for interpreting similarities and differences in how learning is positioned in the strategy documents, aligning with the overall aims of my thesis and contributing to international research in this area.

### **4.2 The choice of case studies**

The reason for selecting three international case studies was to explore the research question in different settings. Discussion of higher education as a single entity obscures the diverse and disparate nature of the sector. Selecting cases with notable features therefore offers a further dimension to the study. Due to the researcher's interests, the criteria of inclusion and access were used and initially two contexts (US and Norway) were selected because they have distinct and contrasting features. Equality of access to higher education is not the same as high participation rates if there is a stratified system of HE. Therefore, because

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both had high participation rates in HE, a third setting where participation is low was added (South Africa). A traditional, highly selective, elite university is based on a very different philosophy to a university focused on widening access and equality of opportunity. The intention of this study is to investigate whether these different philosophies impact on the positioning of learning and teaching strategy, the approach to teaching and learning and the priorities set which may influence the allocation of resources.

Norway is selected as the first case as it has significant public management and control, an egalitarian system with no student fees at public universities. A sample of highly ranked US universities form the second case as a group of elite, highly selective universities in a system characterised by significant social stratification. South Africa is the third case and is included as a system with lower participation and a desire to improve access and inclusion. This means each setting has some distinctive and contrasting features. The contrast in the three settings is shown in OECD data from 2019 about how many of the population have completed tertiary education (expressed as % of 25 to 64 year olds), shows Norway, South Africa and the US, as 42%, 7% and 44% respectively (OECD, 2019). Whilst Norway and US have similar proportions of the population who have completed tertiary education, the level of stratification within these systems is quite marked (see for example, (Brezis' (2018) measures of elitism). The levels of economic polarisation also shows significant contrast in these settings, with an international comparison revealing the highest levels of alienation felt by communities within South Africa, the US also in the top quartile, and Norway in the bottom quartile (World Bank Group, 2018). This implies a more unified society in Norway with greater levels of economic inequality in the US, and a much more divided society in South Africa.

Norway is described as a managed market (Jungblut and Vukasovic, 2018) where the state has a significant role, regulating provision and providing funds. Public universities are fully funded by the state and do not charge tuition fees. Iversen and Stephens (2008) position social democratic countries like Norway as having high public financing for higher education with more socially inclusive outcomes. High participation rates at university, egalitarian income distribution

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and high social mobility are features of the system (Marginson, 2016). Ashwin and Case (2018) position the Nordic emphasis on equal access to educational opportunities as part of a broader political agenda to create an egalitarian society. Brezis (2018) in a cross country comparison found Norway had higher inclusive growth, lower inequality and higher social mobility than many other nations. In fact they found that on the Inclusive Development Index Norway was top out of 29 OECD countries. There are different types of public HE provision in Norway: universities, university colleges, specialist university colleges and private institutions. This study focuses on the public universities. These are: the University of Oslo, the University of Bergen, University of Nordland, University of Agder, University of Tromso, Norwegian University of Science and Technology, Norwegian University of Life Sciences, University of Stavanger, Nord University (Norwegian Directorate for Higher Education and Skills, no date).

This contrasts with the Elite and Super Elite (Taylor and Cantwell, 2018) universities in the United States. Whilst these only represent a small part of the American HE sector, they are distinctive in a number of ways which make them a useful comparator for this research. These universities are often research-intensive, founded in colonial times and very selective (Willetts, 2017). The universities are often ranked highly in international league tables and charge high tuition fees. The most common ranking system in US is U.S. News and World Report. This defines the most selective universities as those accepting 33% or less of applicants and the universities selected for this study feature strongly in both their Best National University Rankings and their U.S. News and World Report Global Rankings. Soares (2007, p.167) finds that in 1988–2000, 64% of the students of Tier 1 institutions were from the top 10% American families in income and “This social composition reflects not just academic competition but high tuition and the use of supplementary entry criteria in the form of middle class cultural capital, for example applicants’ records in music, elite sports and ‘leadership’.” The universities selected for this study are all highly ranked within this competitive and elite system; a system which Taylor and Cantwell (2019) suggest is highly unequal and that this leads to systematic disadvantage for some groups . While ranking systems have been criticised, the purpose of this study is to examine a sample of elite US Universities and so it does not matter that the

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order in the rankings may change over time or vary according to different ranking systems. All of the US Universities in this sample are highly selective and therefore contrast with the more egalitarian sample of Norwegian universities and the less selective environment in South Africa.

The third context is South Africa, which is described as “medium knowledge-producing and differentiated, with low participation and high attrition” (Cloete, 2014, p.1355). After the end of apartheid there have been attempts to evolve the higher education system to offer more equal access by addressing some of the barriers which previously existed and working towards higher participation rates, particularly for previously disadvantaged groups. Ashwin and Case (2018) discuss how the impact of apartheid segregation is still evident but higher education in South Africa is trying to address these challenges through improved access and enhanced outcomes. Indeed, they emphasise how HE is positioned in legislation as a significant contributor to rebuilding a post-apartheid society. This developing sector therefore provides an interesting distinction to the other two case studies.

For purposes of comparison [Appendix B](#) shows information about the universities in the sample, including: THE World University Ranking; number of students; student staff ration; teaching score on THE; overall score on THE; US News Best Global Universities Ranking.

The use of the three international case studies is a distinctive feature of this research. As previously discussed, research of this nature is relatively sparse, so whilst studies have described components of institutional learning and teaching strategies including some reference to pedagogy (Gibbs, 2005), a focus on discourse to understand policy development (Smith, 2008), the process of strategy formation (Clegg and Smith, 2010), responses to strategy by various stakeholders (Newton, 2003), they have mostly focused on specific contexts, and there are no comparative studies on strategies within very different international settings.

#### **4.3 Case Study 1: Higher Education in Norway**

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This section provides an overview of universities in Norway. It positions an HE system which reflects democratic and egalitarian values, emphasising equal access, free education, and a comparatively generous scholarship and loan system. A short history of the sector is provided followed by consideration of learning and teaching, and then a short summary. It is relevant to note that the higher education sector in Norway is often discussed as part of the Nordic model (representing Denmark, Finland, Iceland Sweden and Norway). Whilst there are some differences in each country's approach there are some common features which characterise Nordic education. This chapter will refer to some of the studies about the Nordic model where this provides a helpful wider context but will mainly focus on describing the Norwegian Higher Education sector.

### **4.3.1 The Context**

*“The Norwegian system is adapted to a lifelong learning perspective, where education contributes to the democratic values in society. The system also reflects democratic and egalitarian values that emphasize equal access, free education and a comparatively generous scholarship and loan system.” (Damsa et al., 2015, p.8).*

Ashwin and Case (2018) position the Nordic emphasis on equal access to educational opportunities as part of a broader political agenda to create an egalitarian society. Similarly, Rinne and Antikainen (2022) emphasise key aims of the Norwegian HE system to minimise inequalities and develop equal opportunities, within a public system of free education, both in comprehensive school and higher education institutions. Within this broad landscape, there are different types of public HE provision in Norway: universities, university colleges, specialist university colleges and private institutions. This study focuses on the public universities. These are: the University of Oslo, the University of Bergen, University of Nordland, University of Agder, University of Tromso, Norwegian University of Science and Technology, Norwegian University of Life Sciences, University of Stavanger, Nord University (Norwegian Directorate for Higher Education and Skills, no date).

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Norway is described as a managed market (Jungblut and Vukasovic, 2018) where the state has a significant role, regulating provision and providing funds. As most universities are heavily state funded, government policies are viewed as exerting considerable influence on their strategies; similarly, although not a member of the EU, higher education reforms in the EU are seen as influential (Wiers-Jenssen, 2019). Public universities are fully funded by the state and do not charge tuition fees. This extends to all students including international students which is a distinctive feature of Norwegian universities that sets it apart from many other countries in the Nordic region who have begun to charge fees for students outside the European Educational Area (Wiers-Jenssen, 2019). Iversen and Stephens (2008) position social democratic countries like Norway as having high public financing for higher education with more socially inclusive outcomes. High participation rates at university, egalitarian income distribution and high social mobility are features of the system (Marginson, 2016). Data for 2023 shows 36.7% of 19-24 year-olds, and 17% of 25-29 year olds were enrolled in higher education and 72% completed their Bachelor programme within 5 years (Statistics Norway, 2024). Universities and specialised universities are selective based on Grade Point Average (GPA) but the higher education system in total has more places available for students than there are applicants (see Thomsen et al., 2017). Admissions criteria and student numbers are set independently by universities, and they are largely free to determine their own academic structures and have freedom over their academic content (Nokkala and Bladh, 2014).

### **4.3.2 History of Higher Education in Norway**

The history of higher education expansion in Norway can be divided into three distinct phases, as outlined by Pinheiro and Antonowicz (2015). The first is from mid 1950s to mid-1980s which saw significant growth in student numbers driven by key policy measures. This expansion aligned with broader European trends and was underpinned by principles of equality and social justice. Michelsen and Stensaker (2011) discuss democratisation and university reform in the 1960s aligning with expansion across Europe. Equality and social justice were key underpinnings in the expansion policies in Norway (evident in economic support for students and no tuition fees) accompanied by a number of other drivers for

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the expansion at this time: firstly investment in education for economic development, secondly expansion in compulsory schooling making more people eligible, and thirdly demographic changes following the post-war baby boom (Aamodt and Kyvik, 2004). In response to these drivers, in the late 1960s, the regional college system was created and expanded, aimed at remote locations and first generation to HE students from families with lower educational attainment. Michelsen and Stensaker (2011) cite figures from Nyborg (2007) showing a growth from approximately 5,000 students in 1956 to 30,000 by 1970. This is also supported by OECD records from 1971 which showed less than 8,000 in 1955 increasing to almost 29,000 by 1966. The increased capacity of higher education in the sixties and seventies resulted in higher participation for some previously under-represented groups, namely, women, those from low income households and those living in remote locations. However, by mid 1970s further expansion was restricted because of economic uncertainty and concern about too many graduates in the labour market (Pinheiro and Antonowicz, 2015). Equality of access was also linked to geographic accessibility which led to a focus on regional policy involving the creation of new higher education institutions in more dispersed locations (Aamodt and Kyvik, 2004).

Growth in university entrants slowed from the mid-1970s due to economic recession, concern about too many graduates and an increased focus on vocational education in the college sector (Aamodt and Kyvik, 2004). As a result, the number of university students remained largely the same from mid 70s to late 80s but there was growth in the non-university sector (Pinheiro and Antonowicz, 2015). In the late 70s and early 80s the government attempted to link HE outputs to economic needs (Pinheiro and Antonowicz, 2015). Gabriel and Lester (2013) and Sin, Antonowicz and Wiers-Jenssen (2021) suggest that attracting international students and broader internationalisation agendas were discussed at this time which included recommendations for more programmes to be taught in English. The late 80s saw some decline in humanities and long-term research projects.

The second phase of expansion, Pinheiro and Antonowicz (2015) classify is a concern for quality of outcomes from the late eighties to the mid-nineties.

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Expansion at this time comes more from demand rather than government initiatives, driven by unemployment and higher aspirations of young people (often from educated families). Demographic trends then contributed to a 20–25 per cent decrease in secondary school leavers in Norway between 1990 and 2000 (Aamodt and Kyvik, 2004) which further impacted the university sector. An important shift occurred at this time in response to the Bologna declaration in 1999. Sin, Antonowicz and Wiers-Jenssen (2021) suggest the Norwegian response demonstrated a commitment to internationalisation because although Norway is not in the EU, in 1999 it signed the Bologna declaration.

The third phase, beginning in the early 2000s, saw the implementation of the "Quality Reform" in 2003, which aligned the Norwegian degree structure with Bologna principles. This reform strengthened institutional autonomy and leadership, created an independent Quality Assurance agency (NOKUT), and placed greater emphasis on student-centred approaches (Michelsen and Stensaker, 2011). Aligning with HE in other European countries offered the prospect of greater student mobility. The reforms also sought to increase access to adults, first generation students and women (Pinheiro and Antonowicz, 2015) and included emphasis on collaborations such as with industry (Gornitzka et al, 2004.) In addition, the reforms offered more institutional autonomy with some universities becoming more selective whereas those in more remote locations adopted a more open admissions policy. This also placed more emphasis on students (Michelsen and Stensaker, 2011) and created a formal requirement for all universities to engage with outreach activity (Pinheiro and Antonowicz, 2015). Aamodt and Kyvik (2004) conclude from their review of the expansion of HE in Nordic countries that the most significant driver of increased access has been an interaction of individual demands and political priorities.

Whilst Scandinavian traditions have been described as having an orientation characterised through welfare, democracy and egalitarianism, there have been suggestions that there may be changes to the administrative culture (Stensaker and Michelsen, 2012). They suggest market capitalist approaches are influencing changes in governance. Schulze-Cleven and Olson (2017) also argue that the state in Norway has driven an increased focus on market principles encouraging

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greater accountability and entrepreneurialism. Saarinen and Taalas (2017) suggest that political demands for increased internationalisation against a previous focus on HE as a National entity could present a threat to traditional ideals because internationalisation has often been linked to marketisation of HE and is therefore perhaps at odds with the previous social purpose of HE in Norway. Certainly, at the beginning of this century there has been a significant increase in the number of international students in Norway; Wiers-Jenssen (2019) found that by 2015 10% of students studying in Norway were international. This aligns with an explicit goal to enhance both incoming and outgoing mobility of students (Norway White Paper No. 14, 2008-2009, cited in (Wiers-Jenssen, 2019)). It is important to note that the rationale for internationalisation in this context is an assumption that it improves quality in HE (Sin, Antonowicz and Wiers-Jenssen, 2021).

However, models of student representation and collaboration remain significant features of the higher education sector and the differentiation between universities and other forms of HE has not been undermined by expansion of the sector as has been seen in some other European countries. Brezis (2018) in a cross-country comparison found Norway had higher inclusive growth, lower inequality and higher social mobility than many other nations. In fact, they found that on the Inclusive Development Index Norway was top out of 29 OECD countries. This is also supported by Ramezani and Golafruz (2023, p.16) who reviewed publications about global rankings for Nordic universities and concluded that “It was also notable that among the Scandinavian countries, Norway appears to be the country most reluctant to pursue a market-oriented policy.”

### **4.3.3 Student Education in Norway**

There is an emphasis on quality and innovation in the design of teaching and learning, with a national initiative in place since 2010 to recognise good practice and aspirations in approach (NOKUT, no date). In addition, the Research Council of Norway (RCN) have more recently funded projects focusing on HE through the Education 2020 and the Research and Innovation in the Educational Sector

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(FINNUT) programs (Damsa et al., 2015). NOKUT has a model for Quality in HE in Norway which includes six quality areas, namely: transition, academic environments, leadership and design, learning environments, relevance to society and working life, learning environment (NOKUT, no date).

In their review of research about student learning in Norway, Damsa et al. (2015) describe a focus on lifelong learning and an associated flexible approach to education where students can move between courses and universities. There were indications of positive outcomes in Norwegian higher education with students reporting satisfaction with academic quality, although feedback on didactic teaching methods has been less favourable. They concluded “Although no existing data shed light on the prevalence of the various approaches that can be found in Norwegian higher education, there is undoubtedly much pedagogical variation within the sector.” (Damsa et al., 2015, p. 10). One interesting study funded through the FINNUT programme examined different pedagogic approaches in eight case studies (six of which were from Norway, with two from Finland). They found inconsistencies in the rationales for approaches to teaching and learning for different activities, that pedagogic approaches needed to be adapted for the individual course context, and that student-centred approaches were important but required flexibility in implementation (Nerland and Prøitz, 2018).

#### **4.3.4 Norway Case Study Summary**

The Norwegian HE context aligns with broader ideals in Norway and with an emphasis on equality and democracy. Norwegian higher education has evolved significantly over the past decades, maintaining its core values of equality and accessibility while adapting to changing societal needs and international trends. The system continues to prioritise student learning and educational quality, with a growing emphasis on pedagogical competence and innovative teaching practices.

#### **4.4 Case study 2: Higher Education in the United States**

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This section provides an overview of the HE system in the United States. It explores the wider context for HE generally and then focuses on the elite universities which are the focus for this study. There is then a brief overview of the history of HE in the US and a short summary.

#### **4.4.1 The Context**

*“there is no ‘system of higher education’ in the US: the ecology is diverse and complex, now encompassing almost 4,000 institutions of different types”. (Collini, 2018, p.28).*

The higher education sector in the US is characterised by its decentralised structure with considerable diversity amongst its institutions, which include public and private universities, liberal arts colleges, community colleges, and for-profit organisations. In line with other aspects of the US systems, higher education is not centrally organised at a national level. Cantwell (2018) describes it as the first high participation system. In 2022 39% of 18 to 24 year olds were enrolled in higher education (National Center for Education Statistics, 2024). Approximately twenty five per cent of students enrol at a two year college, but the vast majority enrol at four year institutions (Hanson, 2024). The latter aligning more closely to higher education institutions seen in other countries. The US HE system is known for its broad curriculum, high tuition fees and prominent position in global rankings. However, these features bely considerable variation across the different nature of institutions. Internationally acclaimed universities with the highest rankings are private whereas over 70% of university students are in public institutions (Collini, 2018). The stratification by social class in these contexts is epitomized in Collini’s (2018, p. 29) statistic “the average (mean) income of the parents of undergraduates at Harvard is £450,000 per year.” So although there are high participation rates for tertiary education in the US (National Center for Education Statistics, 2024) there is an unequal balance of participation amongst certain groups who are underrepresented in the higher ranking institutions. Taylor and Cantwell (2018) discuss how white and wealthy students have greater access to the higher-ranking institutions, so privilege is perpetuated and inequalities persist.

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Taylor and Cantwell (2019) devise a categorisation of universities and colleges in the United States which espouses their argument of an unequal HE system. Their depiction of highly selective universities as super elite fits those selected for this study. The universities included in this research are all identified as ranking highly in international league tables. This identification was deliberate to select elite, highly selective institutions, as a contrast to the more egalitarian Norwegian system. Table 4.1 shows the rankings. The most common ranking system in US is U.S.News and World Report. This defines most selective as those accepting 33% or less of applicants. All of the US cases in this study have an acceptance rate below 20% as shown in table 4.1. [Appendix B](#) shows the acceptance rates and ranking for all universities in the study. None of the universities in this study from Norway or South Africa have an acceptance rate lower than ten per cent, and only two (Norwegian University of Life and Pretoria) have a rate lower than twenty per cent. None of the other universities featured in this study are within the top 100 of the Times Higher Education World Rankings (2024). For this study, Oslo is the highest outside of the US with a ranking of 127, the University of Cape Town is the highest in South Africa at 167. These are the only two in the top 250.

Table 4.1: Acceptance rates and THE ranking of the US universities in this study

<b>University</b>	<b>Acceptance rate</b>	<b>Times Higher Education Ranking 2024</b>
Brown	1-10%	64
Columbia College	1-10%	17
Nothwestern	1-10%	28
Princeton	1-10%	6
Duke	1-10%	26
Berkeley	11-20%	9
Johns Hopkins	11-20%	15
UCLA	11-20%	18

#### **4.4.2 The History of Higher Education in the US**

The history of higher education in the United States is a complex narrative of growth, transformation, and persistent inclusion challenges, beginning with Harvard University which was founded in 1636. Initially adopting models from the United Kingdom and Germany, American higher education has evolved into a

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unique system that has significantly influenced global academic practices. The research university model from America has had significant global influence (Bentley and Kyvik, 2012) and US universities continue to dominate global rankings. Bok (1986) claims one of the distinguishing features of the HE sector in America to international comparisons is the freedom from government control.

The early HE system drew inspiration from the English model of residential universities offering broad, liberal undergraduate education, and the German research model for graduate studies (Bok, 1986). In the early 20th century, higher education enrolment was relatively low, with less than 5% participation until around 1920, rising to approximately 15% by 1949 (Bowen et al, 2005). Cantwell (2018) charts the continuing growth in numbers, noting significant growth in numbers between 1900 and 1990. Bowen et al (2005) position low participation rates in the early twentieth century as a result of a lack of belief in the value of this type of education for economic or social mobility. However, this begins to shift and the post-World War 2 era saw dramatic expansion in higher education participation. Initially in New England colleges in the mid nineteenth century, there was a move to meet financial pressures by widening access by adapting courses to enable study to fit around other work commitments and reducing tuition fees (Bowen et al, 2005).

Student numbers rose from approximately eight million in the early 1970s to over 20 million by 2018 (Temple, 2018). This growth was accompanied by increased state funding for scientific research, expanding the role of universities. The expansion also led to the development of different types of institutions, including community colleges and research universities, to meet diverse educational needs. The role of American universities has also undergone profound changes during this time. In the 1930s, there was a shift towards emphasising disciplines of knowledge rather than general philosophy. Kerr (2001) described this profound change in the role of universities with an emphasis more on disciplines of knowledge rather than general philosophy and introducing ideas of a 'multiversity'.

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Taylor and Cantwell (2019) refer to a golden age of higher education during the mid-twentieth century with large enrolment, lower tuition fees and increased research activity. They report that state funding supported wider access at this time. In common with other Western Universities, the traditional role of universities was seen to be undermined by greater managerialism in the early 1990s where governments were seen to have greater influence and business terminology became more pervasive (Conway, 2020). Similarly, Collini (2018, p. 213) notes the rise of a "consumerist focus on student satisfaction". As Slaughter and Rhoades (2004, p. 305) describe "In the early years of the twenty-first century, the academic capitalist knowledge/learning regime is ascendant. It is displacing, but not replacing ... the public good knowledge regime or the liberal learning regime".

Significant institutional stratification is a feature of the US system, which is demonstrated in the development of the Ivy League, originally an American football designation, which has come to represent academic elite institutions. Marginson (2016, p.424) asserts "The US Ivy League universities are engines of social advantage." Comprising Brown, Columbia, Cornell, Dartmouth, Harvard, Princeton, University of Pennsylvania, and Yale, these universities are highly esteemed both within the US and internationally. This stratification also extends beyond the Ivy League to other elite institutions, with revenue for universities being extremely uneven across the sector. The highly differentiated system reflects wider social structures emphasised by the following point, "U.S. higher education provides a diverse group of students with unequal access to different kinds of institutions." (Taylor and Cantwell, 2018 p.166.).

Whilst the participation of minority students in higher education in the United States has evolved significantly over the past several decades (characterised by increased access and representation) persistent challenges and disparities remain. Efforts to widen access have been a characteristic of the system since the early nineteenth century, when Bowen et al (2005, p.16) describe the introduction of "charity funds" which involved subsidies for those without financial means. Despite expanded access, the higher education sector faces persistent challenges related to inequality and student outcomes. High levels of

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participation in higher education and social stratification have occurred at the same time (Taylor and Cantwell, 2018). Critics argue that the US higher education “stratifies people by income group rather than providing them with ladders of opportunity” (Mettler 2014, p. 8, cited in Marginson, 2016, p.427). Revenue for universities is extremely uneven, and high tuition fees and reduced government support since the 2008 financial crisis have exacerbated these issues (Taylor and Cantwell, 2018).

#### **4.4.3 Student Education in the US**

The institutional autonomy and diversity allow for flexibility and responsiveness to the needs of the student body. The top-ranking universities are competing in a global market and seeking to attract international students so internationalisation of the curriculum, research based teaching and institutional reputation are important; for others in the sector who are meeting more local demand, a different set of priorities will be more significant. This variation is also reflected in the “huge concentration of resources and talent in its major research universities” (Collini, 2018 p.213). Liberal arts education is still an important feature, with students typically starting their studies with a broad general education curriculum before pursuing a major. This allows them to explore various fields of interest before deciding on a specialised route and supports the value of learning beyond narrow disciplinary lines. This contrasts with more specialised systems in other countries. A key feature of the US system is the credit-based nature, where students accumulate course credits rather than relying solely on final examinations, and this offers flexibility to move between institutions. This is accompanied by regular assessment, in class participation and relatively high contact hours although quite precarious employment arrangements for teaching staff.

#### **4.4.4 US Case Study Summary**

To summarise, the US higher education system has experienced remarkable growth and has achieved a dominant position in international league tables. It represents a diverse and multifaceted system with institutional autonomy and little governmental control; however it continues to grapple with the balance

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between academic pursuits and market demands. The system's evolution reflects broader societal challenges, so whilst it has expanded opportunities for many, challenges remain in addressing inequality and ensuring positive outcomes for all students. Initially influenced by university structures in Europe, the current style of student education has its own distinctive features, notably liberal arts based education and flexible credit systems.

### **4.5 5 Case Study 3: Higher Education in South Africa**

The political context in South Africa has shaped the Higher Education sector with apartheid curbing access and constraining opportunities for black South Africans. Higher education in South Africa is shaped by this complex history of apartheid and ongoing efforts to address resultant and systemic inequalities. This section sets out the context, the history, and current state of higher education in South Africa, with a focus on student education and the challenges that persist in the post-apartheid era.

#### **4.5.1 The Context**

*“South Africa is a country defined by extreme inequality and this plays out in many ways across its social landscape, including higher education.” (Ashwin and Case, 2018, p.5).*

The Council on Higher Education exists as an organisation to manage the relationship between universities and the government, seeking to balance a coherent policy agenda of transformation with institutional autonomy (Naidoo and Ranchod, 2018). However, it is important not to oversimplify the sector, recognising this could obscure its diverse nature. Indeed, as Ashwin et al. (2018, p.298) express “we know quite a lot about the experiences of a diverse group of students at historically advantaged institutions. But we have a relatively limited sense of the sector overall, and this is a concern at a time when higher education policy is in flux.”

The HE system in South Africa has been shaped significantly by the history of apartheid. The country's higher education sector has low participation rates and

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high attrition (Cloete, 2014), reflecting the ongoing challenges in achieving equitable access and success. Despite attempts in recent decades to redress some of the inequalities, there is still unequal participation and outcomes. Allais, Cooper and Shalem (2019) discuss the complex relationship between inequality, education and poverty in South Africa, noting disparate educational outcomes, chronic poverty and inequality. The importance of higher education in changing or perpetuating these differences is evident in statistics from the World Bank Group (2018) which show HE experiences for the head of a household correlate with 30% lower risk of poverty compared to those without schooling.

Despite numerous policy initiatives and reforms, the system continues to grapple with unequal participation and outcomes. A report by the World Bank Group (2018) notes trends reducing poverty but persistent levels of inequality, referring to South Africa as one of the World's most unequal countries. In recent years, South Africa has made some progress in expanding its higher education system. The public university sector has seen substantial growth, with student enrolment increasing from 495,348 in 1994 to 1,036,984 in 2017; and the gross participation ratio for 18 to 24 year olds, rising from 17.7% in 2010 to 21.6% in 2018 (Van Schalkwyk et al., 2022). However, these improvements have not been uniform across all demographic groups, with significant disparities persisting along racial lines. Ashwin and Case (2018) describe a context seeking to address imbalances in access and completion but where the legacy of apartheid is still visible.

#### **4.5.2 The History of Higher Education in South Africa**

The history of higher education in South Africa is deeply intertwined with the country's colonial past and the apartheid regime. The apartheid system, implemented in 1948, had a profound impact on higher education, creating a divided system. During the apartheid regime segregation based on race and ethnicity delineated access to different types of institutions, as set out by law in the 1959 Extension of University Education Act (Mabokela and Mlambo, 2017). Following the end of apartheid, early attempts at addressing inequality in higher education focused on access specifically on race; later policy initiatives moved to increase participation (with a target of 30% by 2030), and in more recent times

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an aim of greater differentiation in the system to provide both academic and vocational education (Naidoo and Ranchod, 2018). The end of apartheid in 1994 therefore marked a turning point for higher education in South Africa. The new democratic government initiated a series of policies aimed at transforming the sector. After the end of apartheid, the first two policies which sought to redress these inequalities were set out in the 1997 Education White Paper 3 and the 2001 National Plan for Higher Education (Mabokela and Mlambo, 2017). Although the earlier University Amendment Act (1983) opened access and removed formal segregation for Black students to historically White universities, language barriers and entry criteria led to continued segregation (Mabokela and Mlambo, 2017). Mzangwa and Dede (2019) note the failure of both historically black and historically white institutions to effectively adapt admissions processes to remove previous bias.

However, despite the challenges of driving systemic change, the national commitment is central to many policy initiatives. Naidoo and Ranchod (2018) characterise successive government's attempts to build a developmental state following the end of apartheid. They cite the definition of a developmental state from the National Development Plan to build "the capabilities of people to improve their own lives, while intervening to correct historical inequalities" (NPC, 2012, p. 27)" Naidoo and Ranchod (2018, p.11). Higher education has a crucial role to play in delivering this ambition. This was recognised in initiatives such as the development of the National Commission on Higher Education in 1995 (Cloete, 2014) and the creation of the National Working Group (NWG) established to advise government about restructuring higher education, targeting increased participation of previously disadvantaged groups in relation to equity for students and staff (Van Schalkwyk et al., 2022). The role of higher education also plays a particular role in the aspirations to develop a knowledge economy, explicitly articulated in 2008 in a ten year innovation plan (Naidoo and Ranchod, 2018). Further ambitions for growth, equity and greater diversity were set out in a governmental white paper in 2013 (Van Schalkwyk et al., 2022).

#### **4.5.3 Student Education in South Africa**

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There is a clearly stated aim for universities in South Africa to open up opportunities for sharing transformative knowledge as widely as possible (Ashwin et al, 2018). This represents a shift in the landscape of student education in South Africa, which includes efforts to move away from traditional, teacher-centred approaches towards more student-centred learning. Historically, South African universities have relied heavily on face-to-face learning, often employing lecturer-centred approaches in traditional campus settings. However, there is a growing recognition of the need for more interactive and engaging teaching methods, together with greater flexibility in design and delivery to meet the needs of a more diverse student body.

The integration of technology into teaching and learning has been a significant trend in recent years. This shift has been accelerated by global events and the need to adapt to changing educational paradigms. However, the implementation of these changes faces challenges, particularly in addressing the diverse needs of students from different backgrounds.

Financial barriers remain a significant issue for many students, despite the implementation of the National Student Financial Aid Scheme (NSFAS). Many students also enter higher education unprepared due to inadequacies in the school system, highlighting the need for comprehensive support structures within universities.

The curriculum in South African higher education is undergoing transformation, with a shift towards more interdisciplinary approaches. There is also an increasing focus on employability so graduates are equipped with skills necessary for modern society, as emphasised in the National Plan for Higher Education.

#### **4.5.4 South Africa Case Study Summary**

Higher education in South Africa has made significant strides since the end of apartheid but continues to face challenges rooted in its historical context. The ongoing efforts to reform higher education in South Africa reflect a commitment to addressing historical injustices and creating a more equitable system.

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However, the journey towards truly inclusive and high quality higher education for all South Africans remains a work in progress. While access to higher education has expanded, inequalities persist, particularly along racial lines. Democratic South Africa began in 1994 but there are claims that even twenty years later higher education policies have failed to effectively address the inequalities of the apartheid regime (Mabokela and Mlambo, 2017). The sector continues to recognise these struggles in policy initiatives and is working to transform teaching and learning approaches, moving towards more student-centred methods and integrating technology into education.

#### **4.6 Summary of the argument presented in this chapter**

The chapter examines three distinct contexts, demonstrating their varied historical trajectories in higher education and contrasting levels of political influence, stratification, and participation. Norway is characterised as egalitarian with a social democratic orientation, the US as highly stratified and marked by inequality, while South Africa is portrayed as actively working to redress historical societal inequities yet continuing to face significant challenges. This establishes the justification for selecting these three countries as contrasting higher education systems that provide insight into diverse institutional frameworks and enable comparative analysis. This contributes to the higher education literature, speaking to the gap in international comparative studies.

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## **Chapter 5: Research Design and Methods**

### **5.1 Introduction to the chapter**

This chapter introduces the research methods explaining the corpus used for the study, the approach to documentary analysis, and the analytical strategy employed in this research. It notes the strengths and limitations of this approach.

### **5.2 Research Design**

#### **5.2.1 Philosophy**

*“As social constructionists, we do not have the right endowed by possession of a final truth. But we do have the right that all people, in principle, have to intervene in democratic debate with a truth that can be discussed, in order to further our visions for a better society.” (Jorgensen and Phillips, 2002, p. 211).*

Social constructivism believes that knowledge and reality are constructed through human interaction and social processes. When applied to documentary research, this philosophical stance means the documents are viewed not as objective representations of reality, but as socially constructed artifacts that reflect the contexts, perspectives, and intentions of their creators. The language used to describe the strategy of universities thus offers a view of how they position their role and their espoused priorities.

#### **5.2.2 Documentary Research**

Documentary analysis is a common approach in HE analysis (see Tight, 2012) and is adopted for this study. Bowen (2009, p27) defines it as follows, “Document analysis is a systematic procedure for reviewing or evaluating documents—both printed and electronic (computer-based and Internet-transmitted) material.” Tight (2019) claims this is one of the most critical although overlooked aspects of social research. One of the key advantages of documentary research for this study is the access and scope of documents available to address the research questions. University websites provide access to documents which enabled me as the researcher to include different national contexts and a larger number of universities than would be possible in the collection of primary research. This

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provides a broad view of learning and teaching strategies in the words of their own universities. In this study the focus is on written text with consideration of how this fits the specified HE context.

Documentary research is a significant research design in social sciences and Tight describes five main genres which have developed (Tight, 2019). Of these the genre of policy research has the most similarity for this study. Whilst the focus here is strategy documents rather than policy, there is much overlap from a research perspective in the documentary analysis of these two areas. There are many similar/overlapping methodologies analysing documents or text and these were considered as approaches for this research. Content analysis can be divided into two different approaches, firstly conceptual and secondly relational (Tight, 2019). Although this study is focused primarily on qualitative rather than quantitative analysis the description of conceptual analysis as an examination of texts for the “presence, frequency, and centrality of concepts” (Induslska, Hovorka and Recker, 2012, p.50, cited in Tight, 2019, p.148) is applicable here.

### **5.2.3 Conceptual lens**

The study examines the documents adopting a particular conceptual lens. This is central to the research questions. I have asserted that learning theory should be central to any attempts to design, plan and deliver learning. The research therefore aims to interpret university strategy statements in relation to learning theories to investigate whether the statements contain explicit and implicit links to the theoretical underpinning. Initially the use of template analysis (King, 2012) was considered, developing a framework of learning theories and then identifying the presence of these within the strategy documents. It was decided not to adopt this approach in case it biased the results by constraining the emerging themes into these pre-determined categories. Instead, the conceptual framework was used to compare the themes from the analysis with the learning theory landscape explained in chapter 2. This enables the strategy documents to be considered using a conceptual lens of learning theory without the analysis being overly influenced by pre-determined categories.

### **5.2.4 International perspective**

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The study offers an international documentary analysis of a sample of strategy documents from three countries, selected to represent different higher education environments. The use of the three international case studies is a distinctive feature of this research. These contexts are important to understanding the web of significance for the universities under analysis. The three cases are focused on the macro context in each of these settings and each case is made up of a sample of eight individual universities. Collectively these are taken to represent the case. The rationale for the choice of contexts is their distinctive and contrasting nature. This comparative case study approach to compare and contrast the strategies in relation to their context and to each other offers an insight into issues about global higher education.

The study adopts a comparative case study approach examining two of Bartlett and Vavrus' (2016) axes. A comparator of change over time is beyond the scope of this study. The three contexts enable vertical comparison, examining if there is an apparent link between the national, HE context and the individual university's learning and teaching strategy. Horizontal comparisons will be conducted both within nations to see if there is commonality of approach; and between nations to compare and contrast differences within different contexts. In order to reduce the potential of being overly influenced by knowledge of the contexts (i.e. finding what you expect to see related to the key features of each national case), the documents were analysed as a complete set rather than in separate countries, the different settings were only contrasted and the thick descriptions in chapter 4 only developed, after the analysis for the first three research questions was complete.

A challenge for qualitative researchers with comparative research of this nature is the many variables which could account for the findings. This is addressed in three ways: firstly by using a clearly defined data set (the strategy documents), secondly adopting a common analytical strategy within a defined theoretical framework, thirdly by developing detailed case studies of each context to enable thick description.

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International research of this nature is often conducted by a team (at least a pair) of researchers each conducting the study in their own known context. Troman and Jeffrey (2007) discuss the difficulties of comparative analysis in international studies, but this assumes a team of researchers working in the different contexts. A single researcher, as is the case in this study, overcomes the potential of different interpretations and research approaches in the contexts under comparison. However, a limitation of a single researcher is the reflexive conversations that can serve to test the validity of assumptions made in the analysis (see for example Miles and Huberman, 1994). To ensure this important reflexivity was part of the study, supervision meetings and research networks were used to provide critical reflection and test ideas. To limit the imbalance of prior knowledge in this study, none of the contexts selected are known in any depth. Thus, each national context is explored through the literature and this minimises some of the conscious and unconscious bias which may exist if a researcher is studying an environment they are very familiar with and work in. This study is conducted using entirely published material and a method of documentary analysis.

### **5.2.5 Research Questions**

A review of the literature on university strategy documents and learning theory underscores several key gaps that directly inform the research questions posed in my study. As discussed in chapter 2, previous studies have highlighted the centrality of learning theory in shaping effective university teaching practices, yet there is a persistent concern about the lack of theoretical underpinning in both strategy documentation and research on learning and teaching in higher education. This absence has been noted by several scholars, including Tight (2004) and Ashwin (2012). Additionally, most existing research on university strategy documents is limited to single country case studies, with a particular concentration in the UK and Australia, and typically focuses on specific themes such as technology or mission statements rather than the broader strategic positioning of teaching and learning (as discussed in chapter 3). Even more significant for this study is a striking lack of cross-cultural comparative studies. As a result, the literature remains fragmented and context bound, highlighting a

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clear gap for additional research. This study is explicitly designed to address these limitations by conducting a comparative analysis of strategy documents from universities in three distinct national contexts. By mapping these documents to established learning theories and analysing how universities articulate their educational priorities, the research questions have been developed to fill the identified gaps: investigating the extent to which institutional strategies are underpinned by learning theory, the ways in which diverse contexts shape the positioning of learning, and how universities' strategic choices reflect or diverge from global trends identified in the literature.

The research questions align with my arguments that in the current higher education climate, the language used in strategy documents and a robust defence of the intrinsic value of learning, become more significant than ever and that learning theory could play a crucial role in guiding university practices and shaping strategic decisions about student education. They also align directly from the review of previous studies, targeting gaps in extant research and demonstrating the relevance of the study.

The following questions are explored through the conceptual lens of learning theory

RQ 1 What does an analysis of university strategies tell us about the role of modern universities?

RQ 2 Are underpinning learning theories evident in the published student education strategies of universities?

RQ 3 How do universities position "learning" in their strategy documents?

RQ 4 What does a comparative analysis reveal in 3 distinct contexts?

### **5.2.6 Ethical Issues and Limitations**

The use of published statements means there are no ethical issues with access or collection of primary data but requires clear parameters to be defined to ensure that comparisons are legitimate.

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There are six primary limitations of the project design:

Firstly, the design relies on analysis of the published strategies. This does not give access to the design and creation of the strategies and as such the analysis relies on implicit learning strategy as determined through the analysis. Other research approaches such as interviews with the authors of the strategies or more detailed examination of the process of strategy formulation may offer a deeper understanding of whether learning theory explicitly influenced the learning and teaching strategies.

Secondly, access to strategy statements presents both an opportunity and a challenge. The extent to which these statements are in the public domain offers an opportunity to analyse data from a range of international institutions. The extent to which there is a lack of a common format and standardisation in the way they are positioned presents a challenge, for example: explicit for learning and teaching or embedded in other strategy documents; variable length; age of strategy.

Thirdly, as large and complex organisations, an institutional wide document will have limitations. As Zipparo (2023, p.359) found in his case study of an Australian university, “there is likely significant complexity and internal diversity not reflected in institutional representations, which are selective and crafted narratives occurring within a context of normative frameworks and practical constraints. Institutional positioning is restricted in its capacity to describe - and exert influence upon – activity and behaviour within a university.”

Fourthly, for any coding and analysis conducted by a single researcher there is a potential of bias. Where research is conducted with more than one researcher, the analysis can be done more than once and then cross checked to ensure critical examination of the coding framework.

Fifthly, the outsider nature of the research by its nature means I do not have a detailed, embedded knowledge of any of the sectors under investigation. This is a strength in that it allows for a more independent analysis rather than a view clouded by personal experience. However, it is also a limitation in that someone

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with a more detailed understanding of the context may not feel I have captured this accurately. The limitation is therefore that the view I represent is one drawn from the literature rather than real world experience. It becomes a compromise between breadth and depth of the areas under investigation.

The final area of limitation is perhaps more of a potential criticism of the aim and research questions. It could be argued that learning and teaching strategies in HE institutions do not require an understanding of learning theory as this will be more relevant at the stage of learning design and delivery. This will be critically examined as a perspective in the research report.

## **5.3 Methods**

### **5.3.1 The case studies**

The study explored twenty four strategy documents, (eight from each of the three different settings) to investigate how universities position learning in these documents. The different national contexts are important to understanding the web of significance for the universities under analysis. The study therefore adopts some of the principles of thick description (Geertz, 1973), which is relevant for the purpose of analysis in cross cultural settings and sets out a detailed case study of each of the HE settings within which the investigation takes place (in chapter 4) before presenting a thematic analysis.

### **5.3.2 The data set**

Strategy statements form the research corpus for this study. Information on university websites described as strategy, strategic plan, or strategic framework were selected as the subject for analysis. [Appendix D](#) shows the positioning of the statements for each university. Sections of the document related to academic strategy and teaching and learning were selected for analysis. These documents formed the body of text for analysis.

Institution wide strategies were analysed as the intention was to consider the strategic direction across the university, rather than in separate divisions or faculties. Faculty level strategies will contain additional variables such as

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disciplinary specific approaches to student education and were therefore excluded from this analysis. The strategies were downloaded from the universities' websites within a specified timeframe (October 2022). There are different approaches to the publication of strategic plans, so they do not always appear in the same format. The research investigated published statements so where a strategy was not visible on the website or was restricted to employees, a decision was taken not to try and obtain access. Instead, where there was no strategy document on the university website, these institutions were not included in the analysis.

The length and scope of the documents varied considerably. Some contained high level priorities whereas others contained detailed plans and updates on progress. The analysis of strategies is not therefore a like for like comparison, it is a search for meaning and patterns within the data. The approach adopted was to select whatever sections of published strategy documents related to education or teaching and learning. A strategy document that has more coded items is not deemed to have a stronger emphasis on learning than one which has fewer items. A more nuanced analysis is required. This works with the qualitative philosophy informing this research. A comparison across national contexts will only be made following the thematic analysis and therefore focuses on the interpretation of the strategies and not the volume of coded data.

The published dates for the strategies were recorded, together with details of its positioning on the university's website (for example, whether it is a standalone strategy or a component of a broader strategy document), and any other background information presented (such as, the origins of the document, those consulted in development etc.). The timeframes for strategies varied across the sample and some were updated during the period of this research. Strategies downloaded in the specified time were used but this means they do not necessarily align with the version currently on the website of some universities. The strategy statements were uploaded to Nvivo as the corpus for analysis.

A table showing descriptive details for the strategies is shown at [Appendix D](#). This includes details such as: inclusion and exclusion criteria, search strategy

developed, description of document, capture data about where it is located, whether a separate document or embedded in university strategy, date of access, year of strategy document, when is review planned.

## 5.4 Approach to Analysis

### 5.4.1 Overview

The data analysis was conducted in a number of stages. The approach is depicted in table 5.1 and then explained in more detail in relation to each research question. Computer aided analysis using Nvivo software was used to support the analysis (an extract of the code book is shown at [Appendix E](#)).

Table 5.1 Approach to the analysis for each research question

Research Question	Approach to analysis	Aim of analysis
What does an analysis of university strategies tell us about the role of modern universities?	<p>Thematic analysis using three broad questions for the initial analysis:</p> <ul style="list-style-type: none"> <li>• What underpinning beliefs are evident in the strategy?</li> <li>• What does the strategy tell us about what type of learning/knowledge is valued?</li> <li>• What does the strategy tell us about the qualities, features and characteristics of learning?</li> </ul>	<p>To use the conceptual lens of learning theory to interrogate the documents and establish what they say about the role of learning in universities.</p> <p>The rationale for focusing on 3 questions was to use these as guiding principles related to the conceptual lens.</p>
Are underpinning learning theories evident in the published student education strategies of universities?	Further interrogation of the thematic analysis in RQ 1, to identify how the key themes relate to the learning theories outlined in chapter 2.	To identify from the thematic analysis which learning theories are explicitly or implicitly positioned in the strategy documents.
How is learning positioned in the strategy documents?	Concept analysis of the positioning of the word "learning". This was done using Nvivo text search query for "learning" with	The intention was to group strategy documents with common themes by looking at patterns in the

	<p>stemmed words. This was viewed as references in the strategy document and as word trees showing the way learning is connected to other concepts.</p> <p>Word frequency analysis was also conducted using Nvivo to identify the most common words (including stemmed words, excluding university and the university name) and the relative frequency of key concepts (learning, research, teaching, knowledge and education). This analysis is shown at <a href="#">Appendix F</a>.</p> <p>After identifying key themes, the way learning was positioned in the documents was assessed on two different dichotomies. Firstly, is learning central or peripheral.</p> <p>Secondly, is learning distinctive or generic.</p> <p>This was then used to create a conceptual framework with 4 classifications. A fifth classification (conflated) was added initially but later removed.</p>	<p>way learning was positioned.</p> <p>The detailed focus on “learning” related to the research question. The analysis of other key words enabled comparative and relational positioning to be identified.</p> <p>The development of the framework enabled the categorisation of the strategies to make sense of the patterns.</p>
<p>What does a comparative analysis reveal in 3 distinct contexts?</p>	<p>Compare and contrast analysis for RQ 1 and 3 in relation to the three international contexts.</p> <p>Analysis from RQ 1 and 3 and characteristics of the universities were produced in a table to summarise the</p>	<p>To determine whether the way learning is represented in strategy documents varies in different contexts.</p>

	<p>data and surface any patterns. <a href="#">Appendix G</a>.</p> <p>In conducting analysis for RQ 1 and 2 and close reading of the strategy documents notes were kept of any questions related to the different contexts. These were then revisited to compare and contrast the results.</p>	
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The table is adapted from Winstone (2022) and customised for this project.

#### **5.4.2 RQ 1 What does an analysis of university strategies tell us about the role of modern universities?**

The data analysis was initially conducted using a form of thematic analysis (Braun et al., 2019). The rationale for this choice is to examine patterns of meaning within the texts as a qualitative data technique which provides interpretative depth through the thematic analysis. Reflexive thematic analysis helps the researcher to actively interpret and construct themes, acknowledging their subjectivity and theoretical positioning throughout the process. This is relevant for this cross cultural context as it allows me to interrogate complex strategy documents with a variety of formats in a way that enables themes to be identified.

My approach to analysis draws on previous research that has used thematic and related approaches to analyse strategy or policy documents. Other studies which informed my thinking analysed aspects of strategy or policy documents adopting a range of approaches. Smith (2008) adopted a detailed textual analysis to analyse the discourse of learning and teaching strategies. Analysing university mission, Jungblut and Jungblut (2017) used a quantitative content analysis; Ozdem (2011) identified themes and sub-themes in mission and vision statements; Ashwin, Abbas and McLean (2015) assigned codes to extracts of policy documents. The approach here has some commonality with extant research drawing on a set of themes derived from the literature. The particular emphasis here uses a theory informed approach to the analysis rather than

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establishing predominantly emergent themes from the documents. This is intended to look at the documents through a specific lens to identify the explicit and implicit underpinning learning theories.

Braun and Clarke's guide to conducting thematic analysis helped guide my approach. They define a theme as something which "captures something important about the data in relation to the research question and represents some level of patterned response or meaning within the data set" (Braun and Clarke's, 2006, p.82) and position the choices one must make in determining the approach to thematic analysis. For this study, the themes are derived in an inductive way from the data set. This means the coding was not determined from the literature but from the researcher's interpretation of the data, and the analysis was iterative in nature. However, the approach is not purely inductive as the researcher is informed by a theoretical understanding of relevant literature. It is acknowledged therefore that whilst the themes are data driven, the areas selected as important or interesting, are likely to be influenced by prior knowledge of research in this field. However, the decision to begin from an inductive approach rather than deriving a set of themes from the literature for the initial coding was taken to allow for new and original themes to surface.

Braun and Clarke (2018) propose six phases of analysis which are used here to explain the process followed for this study.

#### **5.4.2.1 Data immersion and familiarisation**

Reading the strategy documents, capturing initial impressions, writing notes of interest, recording key characteristics. This phase was deliberately kept brief prior to the coding but returned to as an iterative approach following the coding and as part of the identification of patterns in the data. The rationale for beginning coding following familiarisation but not immersion in the data was so as not to form too fixed a view at this stage or to develop assumptions about the different national contexts. The documents are therefore coded by looking for examples of text which position or explain the university's approach to learning without considering different contexts or predetermined view of what is important in each strategy. Thus, the coding identifies the examples which are used to determine

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the patterns. Making sense of the individual strategies is then returned to following this phase with the coding used to support the immersion in the data.

#### **5.4.2.2 Generating initial codes**

For this study, very broad a priori codes were identified for the first stage of analysis using 3 broad questions to guide the analysis in line with research questions. These questions frame the creation of codes. Under these headings the text was examined for interesting and contradictory findings, search back through the corpus to identify further examples or confirm that features are unique or surprising. This enables a reflexive and iterative process by which something that emerges can be revisited across all of the data set to seek further examples and provide further comparison. The researcher becomes embedded in the data and the initial analysis is expanded and developed by an iterative process of emersion in the cases and an exploration of connections and contradictions.

Three broad questions were posed for the initial analysis:

- What underpinning beliefs are evident in the strategy?
- What does the strategy tell us about what type of learning/knowledge is valued?
- What does the strategy tell us about the qualities, features and characteristics of learning?

These questions ensure the documents are interpreted in relation to the research questions. Examination of the statements through a different theoretical lens would create a different set of outcomes. The rationale for being guided by broad questions rather than a more detailed template at this stage was to avoid Ashwin's (2012, p.942) concern regarding "the tendency of this research to appear tautological, with theories seeming to over-determine the outcomes of empirical research in higher education". Discussing Bernstein's languages of description, Ashwin (ibid) likens the outcomes of the data analysis to the external language of description, and the internal language to the theory. For this study my intention is to analyse strategies through the lens of learning theory so the learning theory framework must guide the analysis, but my understanding of the critique is that I must avoid just finding what I'm looking for. So, stage one looks

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at the strategy documents under these three broad questions which are informed by the research questions but avoid being over prescriptive.

Where the data under analysis comes from interviews or other primary methods the data already aligns with the research question. Where the data is secondary it may be much broader than the focus of the research. Although the first stage of this analysis is largely inductive it is guided by some questions to provide a specific focus on what the strategy documents say in relation to the research questions. This enables patterns in the documents to be analysed in an inductive approach whilst focusing on the area of research. An entirely inductive approach looking for patterns in the documents would reveal areas not within the scope of the research, such as financial planning, infrastructure investment etc. The broad questions enable this to be excluded from the analysis. This works in the same way as collection of primary data where an interviewer, for example, does not say tell me everything, they use questions to guide the areas they wish to investigate.

The coding involved careful reading of the documents and identifying text within documents that speaks to the 3 broad questions and inductively creating codes. This is a reflexive approach emphasising the subjectivity of the interpretation (Braun and Clarke, 2021). Some thematic analysis approaches suggest greater reliability by more than one researcher coding separately and then comparing and refining codes by agreement. Braun and Clarke (2021a, p.39) describe this as “Coding reliability approaches” which they contrast with a more reflexive approach. The latter is adopted for this study. Whilst the subjectivity is acknowledged this does not indicate any less rigour in the analysis of data. The coding is revisited and adapted many times to ensure appropriate data is captured and coded appropriately. This enables the researcher “to reflect on their assumptions and how these might shape and delimit their coding” (Braun and Clarke, 2021a, p.39). This involves: active re-reading the strategy documents; reading the coded data and where appropriate assigning text to different codes; and using explore, compare and matrix coding queries in NVIVO. Through this process codes were revisited and amended until the researcher felt coding was appropriate across the strategy documents. For example, where a new node was

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added, the text query function was used to search for similar words in previously analysed documents in case references had been missed. As well as being guided by the questions, Saldana's (2021, p.33) advice to ask oneself through all stages of the analysis "What strikes you?" was a helpful refrain. The code labels were also refined through this process and a more detailed description of what data was categorised under each heading was created. So whilst familiarisation of the data occurred at phase one, immersion in the data was strongly linked to the coding process. This aligns with Clarke's assertion that thematic analysis is not linear but more of a recursive approach. The codes which were developed are shown at [Appendix H](#).

At this stage further immersion occurred through careful reading and note taking of the strategy documents. This was to form an overall impression of each strategy and record insights in relation to key characteristics. NVIVO searches were used to investigate the text where things were noted in the reading. For example, word trees were used to collate examples where a particular word seemed important.

#### **5.4.2.3 Generating initial themes**

This stage reviewed the codes created in Nvivo to look for patterns and clusters which are relevant to the research questions and thus generated initial themes. The 3 guiding questions are no longer used as a structure. They served the purpose of providing a scope for the coded information but are now superseded by the emerging patterns. This enabled relationships across and between the 3 areas to be considered. The themes generated in response to RQ 1 draw on both manifest and latent content analysis, so both what is directly observable in the data, and what the meaning is underlying what is observed Boyatzis (1998).

#### **5.4.2.4 Reviewing the themes**

This required a further stepping back from the analysis to reflect on coherent patterns in the coded data. Consideration was given to areas of overlap, relationships and recurring patterns within the codes in order to refine the themes.

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#### **5.4.2.5 Determining the significance and naming the themes**

Having refined the themes they were then considered in response to the research questions. So returning with the analysis to ask what these themes indicate about the role of modern universities. This enabled a prioritisation to select what was most meaningful for this study. Themes were initially identified which spoke to the role of the university and these are discussed in relation to RQ 1.

#### **5.4.2.6 Researcher Reflexivity**

At each of the stages reflexivity was applied to review assumptions and test the evidence for interpretation. As such, the process was not as linear as the 6 stages imply and was much more iterative, repeatedly checking codes and themes, and returning to the strategy documents to ensure the rationale was justified. NVIVO was very helpful in this regard as it allows the analysis to be viewed in a number of different ways. The coded data could be seen in a thematic way, but also viewed within each document which allowed further reading of the documents to ensure the coding was appropriate. It also allowed an analysis of what was not coded to ensure that something was not missed because it was unique or unusual. Discussions with my supervisor and research networks also created opportunities for critical reflection. This in depth understanding of the data was challenging at times due to the breadth of material under consideration but the cycles of returning to the analysis to check the coding, the multiple tools for viewing the analysis in different ways and the feedback processes helped to build confidence in the approach. This detailed understanding of the strategy documents formed the basis of the subsequent stages of analysis.

#### **5.4.3 RQ 2 Are underpinning learning theories evident in the published student education strategies of universities?**

The thematic analysis was also used to address the second research question. This used the same coding in response to the 3 broad questions but then rather than the more inductive approach of what emerged about the role of the university, this stage takes a more deductive approach, considering which of the codes relate to the learning theories set out in chapter 2. As advised by Auerbach

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and Silverman (2003) the central concern of the research and the theoretical framework were central to this approach. This approach adopts a similar strategy to Saldana's (2021) elaborative coding, but rather than using data from a previous study, this analysis uses theoretical constructs from the literature review. It now analyses the initial codes to look for patterns. A number of themes were identified and these were then matched to the top-down conceptual framework.

#### **5.4.4 RQ 3 How do universities position “learning” in their strategy documents?**

The second analytical approach involved conceptual analysis of the published strategy documents which explored the way “learning” is positioned in the documents, considering interesting features, exploring areas of distinctiveness, and identifying explicit and/or implicit references to learning theory. This was done using NVivo text search query for “learning” with stemmed words. This was viewed as references in the strategy document and as word trees showing the way learning is connected to other concepts. See example [Appendix I](#).

Word frequency analysis was also conducted using NVivo to identify the most common words (including stemmed words, excluding university and the university name) and the relative frequency of key concepts (learning, research, teaching, knowledge and education). This analysis is shown at [Appendix J](#).

After identifying key themes, the way learning was positioned in the documents was assessed on two different dichotomies. These were used as ways of categorising what were observed patterns in the data about the way learning was positioned. Firstly, is learning central or peripheral. Secondly, is learning distinctive or generic. This was then used to create a typology with 4 classifications. A fifth classification (conflated) was added initially but later removed. Conflated was used initially because there were some documents where teaching and learning were predominantly combined as if they were a single concept. Following the classification it was clear that this was a pattern emerging in one particular country and it was therefore decided to explore this in the comparative analysis (RQ4) rather than as a separate classification here.

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Two significant dichotomies were determined to be:

Central-----Peripheral

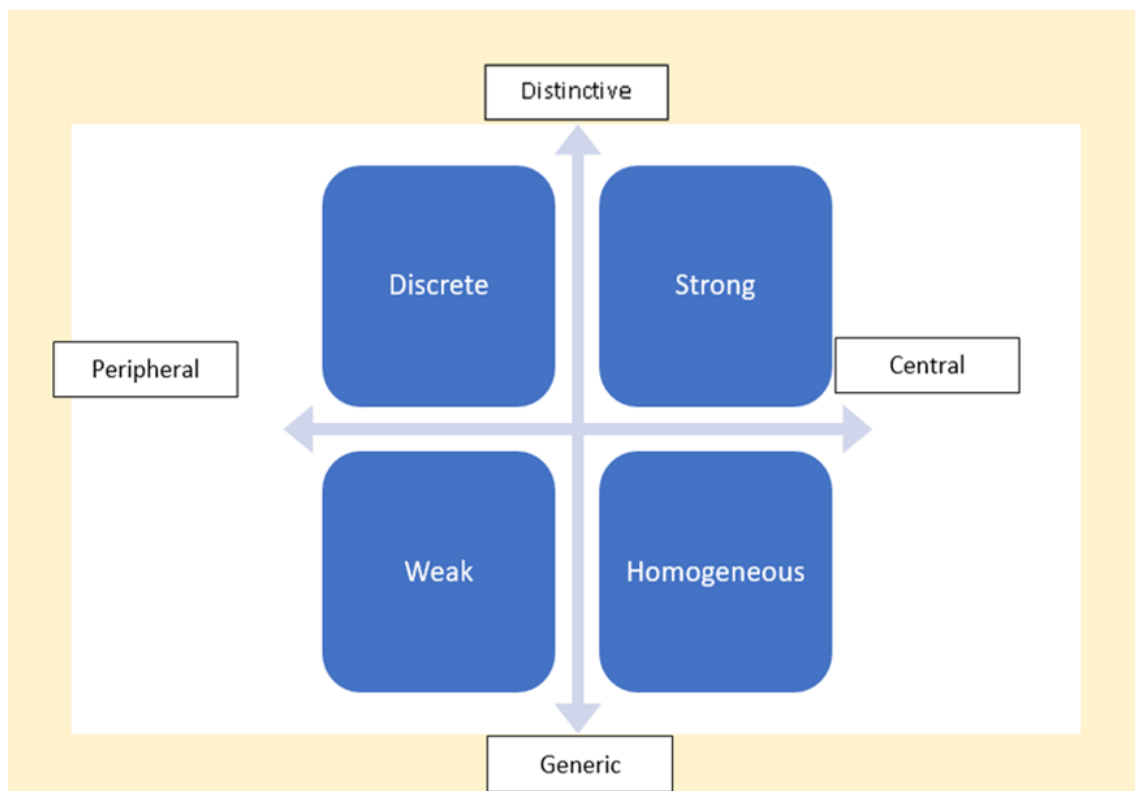
In some documents learning was central, it was embedded throughout the document, referenced many times and in relation to a range of different aspects of learning, acknowledging that learning is multi-faceted. In others, learning was far more peripheral, with limited references to learning and those that existed were not multidimensional.

Distinctive-----Generic

The second consideration was whether learning is distinctive with clear positioning of an approach to learning or whether it is broadly positioned in generic terms.

These were then combined to represent the way learning is espoused in the strategy documents into four categories of learning identity.

Figure 5.1 A typology of learning identities



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This created the following categories:

Discrete – learning is described in specific terms but is peripheral to the document.

Weak – “learning” per se is not highly valued in the document.

Strong – learning is central to the document with many references including areas such as learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. There is a clear positioning of a distinctive approach to learning for the university.

Homogeneous – learning is central to the document with many references including areas such as learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. There is a strong commitment to learning in these strategy documents with generic positioning of the approach.

The classification of the university strategies using this typology are presented in the results section to explain how learning is positioned in the documents.

#### **5.4.5 RQ 4 What does a comparative analysis reveal in 3 distinct contexts?**

Analysis from RQ 1, 2 and 3 and characteristics of the universities were produced in a table to summarise the data and surface any patterns ([Appendix G](#)). In conducting analysis for RQ 1, 2 and 3, and close reading of the strategy documents notes were kept of any questions related to the different contexts. These were then revisited to compare and contrast the results.

### **5.5 Summary of the argument presented in this chapter**

In this chapter I have argued that a theory informed thematic analysis of university strategy documents, across 3 international contexts, offers an appropriate way to investigate how universities conceptualise the role of learning. By using Braun and Clarke’s (2018) model of thematic analysis, the research design adopts an evidence-based approach so it is neither too descriptive or

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overly determined by the theoretical lens. My intention is to combine theory with the analysis without that outweighing the documents' own meaning. To achieve this the analytical structure is both flexible and derived from learning theory to provide a framework that is empirically grounded and theoretically meaningful. A conceptual analysis is then described which was used to determine the position of 'learning' in the documents.

The chapter also explains the comparative element, to explain how focusing on three distinct national contexts, directly addresses known gaps in the literature regarding cross cultural differences and the influence of local policy environments. By justifying methodological decisions at each stage, the chapter demonstrates how this approach is designed to support the research questions and provide an appropriate mechanism to analyse the strategy documents. As such, my argument is for a methodology which is multi layered and reflexive in design to address the research questions in line with the theoretical and practical challenges.

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## **Chapter 6: Findings**

### **6.1 Introduction to the chapter**

This chapter explores what we can learn about the ethos and priorities of universities through an analysis of their strategy documents. This section is structured in relation to the research questions addressing each in turn.

### **6.2 RQ 1 What does an analysis of university strategies tell us about the role of modern universities?**

This section presents an overview of the role of the university with examples taken from the strategies to illustrate the points, and to represent recurring themes. The data was themed categorically (Saldana, 2021). Considering the 24 documents together, this offers a clear insight into the role of modern universities. There was a lot of common ground, recognising core activities of education and research with contribution to society. Viewing the strategies through a conceptual lens of learning theory and conducting thematic analysis to consider what type of learning is valued and what characteristics of learning are prominent revealed a lot more similarities than differences between institutions. The role of the university features prominently in all of the strategies. For some this was general about the value of higher education, for others a statement about their particular position and distinctiveness. Norwegian universities even state an explicit societal mission. Firstly, looking at what the strategy documents tell us about the role of universities, this translates into a very consistent and strong message about universities' research, teaching and impact on society. This offers a strong foundation for a sector that in the UK feels to be often under attack (mickey mouse universities, value for money etc).

In broad terms there is a lot of commonality in the way the strategy documents position the role of the university, focusing on the role in society, knowledge creation and dissemination, generating insight and solutions to issues facing society, developing the skills and capabilities students will need to play a meaningful role in society, research and innovation, scientific and sustainable development goals, solving global challenges, using knowledge to benefit society and engage in public debate. Whilst there is a lot of common ground this belies

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a difference in emphasis. Some are more specific about preparing students for employment and the world of work, some particularly focused on leadership, others highlighting the attributes to adapt to a changing world, others claiming a role in social justice and a positive impact on societies and local communities, even transforming society, many also claiming global impact.

The role of universities to solve the World's problems and work collaboratively with local societies and seek solutions to problems was positioned as an integration of the different arms of the universities' strategies, bringing together education, research and wider communities. This is illustrated in the following quotes (see [Appendix L](#) for more examples): "Together, our researchers and students will generate novel insights to address the challenges that face society today." (University of Bergen 2019, p.4) and "Faculty, staff, students, alumni, and our larger community will come together to address the great challenges of our time" (Berkeley 2018, p.1). The universities demonstrated considerable ambition about their impact on the World, shown here "NMBU shall contribute to safeguarding the basis for life in the future through outstanding research, education, dissemination of knowledge and innovation." (Norwegian University of Life Sciences 2019, p.1) and here "The African university shaping futures in the service of humanity." (UNiSA 2020, p.3).

This was also seen in the positioning of knowledge both for its development and to stimulate change, which was significant across the sample (in-depth claims about research specialisms were excluded due to the focus of the study). As the focus of this project is the positioning of learning within the strategy documents, the claims about research have not been examined in depth but where research is integrated with teaching or in the general description of the role of the university it was included in the analysis. Knowledge creation, development, production, the pursuit of knowledge, new knowledge, novel approaches, knowledge hubs were terms used to position this central feature of a university's purpose. Knowledge was seen as linking research and education purposes for many, and certainly for linking to the societal aims of the universities. Generating knowledge, disseminating knowledge and collaborating beyond the university recurred as ways the universities could impact society, communities and shape the future.

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Interestingly, the strategy documents place a much heavier focus on the role of the university to society than specifically to industry and governmental skills agendas. A number of documents mentioned equipping students with the skills and knowledge required for work and economic needs. This was certainly an output for those documents including detailed key performance indicators where employability of graduates is measured. However, the focus on business needs was much less prominent in the sample of documents than might have been expected given critiques about the increasing neoliberalism of education. In fact, where graduate outcomes were mentioned, these were often still linked to contributions to society and social needs, for example,

“producing knowledgeable and high-level skilled graduates in line with the needs of the South African economy and society, and to replenishing our own human capital needs and those of other knowledge institutions.” (University of Pretoria 2011, p.9).

Furthermore, with regards to preparing students for the future, some of the documents highlight the need for capabilities to navigate a dynamic future, acknowledging there is a role for universities much wider than disseminating existing knowledge. For example, “educates thinkers who are capable of shaping, adapting and responding to the unknown” (University of Cape Town 2021, p.10) and “make a tangible movement towards civic renewal.” (Tshwane University of Technology, no date, p.1) and “to flourish in a world that neither we nor they can yet know” (Columbia College, no date, p.1). This is also evident in the references to lifelong learning and an emphasis on inquiry which are discussed below.

Another strong theme was that of diversity and inclusion. Whilst all of the documents reference diversity or inclusion in some form, the emphasis on what this means varies from those talking about diversity of students through widening access and those focusing on democratic values and seeking to be representative of local communities. If inclusive is taken to mean accessible to everyone without excluding certain groups of people, this is sometimes at odds with the selective nature of recruitment to some of these universities. Measures

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of the acceptance rate for each of the universities is shown in [Appendix D](#) and categorised for purposes of analysis as highly selective, medium, less selective. Indeed, some qualify inclusion themselves to state that they are open to the most able regardless of background, or talk about removing barriers (often financial). On a continuum from egalitarian to elite, some of the universities are trying to position themselves at one end or the other of this spectrum, others are claiming to be both elite and egalitarian which is an interesting juxtaposition. Classifying universities along this continuum is shown at [Appendix G](#). Whilst comments about being highly selective academically may not be a contradiction to being inclusive of different groups of society, and removing financial barriers may create access to some people who would otherwise not have the opportunity, this warrants further examination. Indeed, some of the South African Universities overtly recognise the need to address the inequalities of the past acknowledging prior imbalance. So whilst for some inclusion is about democratic values (particularly explicit in some of the Norwegian strategies), for others inclusion is about increasing diversity whilst remaining highly selective.

### **6.3 RQ 2 Are underpinning learning theories evident in the published student education strategies of universities?**

The initial coding shown at [Appendix H](#) included a number of codes which are relevant to the conceptual framework. These emerged in coding primarily about what the strategy tells us about the qualities, features and characteristics of learning, but with related links in response to what is valued and what underpinning beliefs are evident. These were developed into the following themes.

#### **6.3.1 Theme 1: Learning is an active process**

This theme links to constructivist theories of development and experiential learning models. It is interesting to see so much emphasis on this across the sample, far more than the reference to transmission approaches, when the latter has been the traditional delivery method for most higher education.

#### **6.3.2 Theme 2: Learning is a shared endeavour**

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References to collaborative learning are ubiquitous with many references to collaboration, community and partnership. The references to international, diversity and interdisciplinary learning are all positioned as part of a collaborative process of learning, and in relation to the value they bring to this process. Social learning theory, collaborative and cooperative learning, and situated learning theories are all relevant to this theme. The significant emphasis here across the 3 contexts is worthy of note; when so much education is individually assessed, that seems at odds with strategies that espouse a higher value to collective rather than individual learning. A difference across the 3 countries might also be expected given the different funding models but this was not apparent in the findings.

### **6.3.3 Theme 3: Learning is future focused**

There were lots of references to innovation and the development of new knowledge, both about transformative learning for the individual and their future prospects but also about creating sustainable impact on societies and developing skills to solve tomorrow's problems. Transformative learning theory appears particularly relevant to this theme.

### **6.3.4 Theme 4: Learning requires challenge**

This theme reflects the more traditional modes of learning within higher education. Critical thinking, independent learning, inquiry and discovery, research based and intellectual aspects all present a view of a learner's engagement with challenging concepts, developing new knowledge and ways of thinking. Insight learning, self-directed learning, andragogy and Vygotsky's Zone of Proximal Development appear influential in this theme.

### **6.3.5 Theme 5: Learning is a process**

This final theme captures references to the process of learning including links with teaching and pedagogy, and tools or mode of delivery such as digital and flexible approaches. Illeris' (2016) field of learning identifies a number of these features.

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These five themes align with the conceptual framework where the positioning of learning could be said to align with an implicit theoretical approach. In the main the terms are used in a colloquial manner, so 'active' or 'collaborative' are not explicitly linked to theories but it could be surmised that there is a certain accord with the central precepts of the theories. The extent to which these references are translated into programme design and pedagogic approaches is beyond the scope of this study and cannot be presumed.

There was also evidence of how current debates in the HE literature are reflected in the learning and teaching strategies, such as greater consideration of issues related to diversity and inclusion; the role of technology in widening access; creation of learning communities; the value of a more student-centred approach rather than teacher-focused approaches of traditional university; co-creation or students as partners; informal learning opportunities, developing the student outside of the classroom through a variety of learning experiences and collaborative learning.

Whilst learning theory could be implied to have an influence in all of the documents, explicit references to learning theory were quite rare. Noticeably, references to theory in general are largely absent, not just in relation to learning. A few mention links between theory and practice as part of an approach to learning, and WITS (2010, p.25) refer to a theoretical underpinning for their pedagogy (without anything more specific), "use of pedagogical practices that encourage learning firmly rooted in strong theory". The only two with explicit mentions are UCLA (2019, p.4) who cite research about the importance of active learning, including "A recent meta-analysis of 225 papers studying the impact of active learning methods on learning outcomes found strong evidence that active learning is superior to lecture-based approaches in STEM education." The only one clearly espousing a particular theory is Stellenbosch University (2018, p.11) who specifically reference Senge "Collaborative learning provides the basis for the university to be a learning organisation – an organisation characterised by a shared vision, team learning, systems thinking, mental models and personal mastery (Senge, 2006; 2014)" and explain the value of such an underpinning,

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“adopt relevant theoretical frameworks which will create a basis for shared understanding at SU.”(2018, p.7).

### **6.4 RQ 3 How is learning positioned in the strategy documents?**

This section focuses specifically on the way “learning” is positioned. The subsequent discussion will explore why the terminology is significant and what the positioning reveals about what the institutions portray as important. [Appendix J](#) shows the most common words and word trees showing frequency and positioning of key concepts related to this project. As would be expected in line with the positioning of the role of the universities (explored in the previous section), education in some guise features strongly in them all, and the broad interrelationship of research and education missions of universities is ubiquitous. However, the emphasis on different aspects and the particular language used varies, so whilst in the majority of strategy documents learning is explicit, this is not the case for all. Some documents talk about education or knowledge but make few references to learning itself. One of the most surprising aspects of the findings though is how analogous the positioning of universities is in many of the strategy documents and this extends to the way learning is represented. Only half of the strategy documents express a perspicuous approach to learning. The analysis sought to identify these common features and explore areas of distinctiveness.

To analyse the different ways in which 'learning' is positioned in the strategy documents, the features which differentiated them were identified. Two significant dichotomies were determined to be:

Central-----Peripheral

In some documents learning was central, it was embedded throughout the document, referenced many times and in relation to a range of different aspects of learning, acknowledging that learning is multi-faceted. In others, learning was far more peripheral, with limited references to learning and those that existed were not multidimensional.

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Distinctive-----Generic

The second consideration was whether learning is distinctive with clear positioning of an approach to learning or whether it is broadly positioned in generic terms.

These were then combined to represent the way learning is espoused in the strategy documents into four categories of learning identity. The groupings are:

Discrete – learning is described in specific terms but is peripheral to the document.

Weak – “learning” per se is not highly valued in the document.

Strong – learning is central to the document with many references including areas such as learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. There is a clear positioning of a distinctive approach to learning for the university.

Homogeneous – learning is central to the document with many references including areas such as learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. There is a strong commitment to learning in these strategy documents with generic positioning of the approach.

The categorisation of the strategy documents in these four quadrants is shown below. The attributes of the documents and demographics of the universities were considered to ensure that there was no specific characteristic which might explain the differences in the categorisation of learning identities. Table 6.1 shows the universities classified in each quadrant.

Table 6.1 : Classification of learning identity

<b>Discrete</b> Nord	<b>Strong</b> NMBU
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Stavenger Berkeley	NTNU Stellenbosch UNiSA Nothwestern Duke UCLA Pretoria Tshwane Agder
<b>Weak</b> Oslo Johns Hopkins Princeton Columbia WITS	<b>Homogeneous</b> Bergen NWU Brown Cape Johannesburg USN (University of South- Eastern Norway)

Whilst the strategy documents showing a strong learning identity were less than half of the sample, this was the largest category. With 10 universities in strong and a further 6 in homogeneous, learning was shown as a priority in a majority of strategy documents. Below, each of the 4 categories are explored in more detail.

#### 6.4.1 Strong

Turning firstly to the universities with the most distinct approach to learning, these were identified as where learning is central to the document with many references including areas such as learning philosophy, environment, learning outcomes,

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learning experiences, approaches to learning and learning methods. It is interesting as a category that all three countries have examples of distinctive positioning of learning but that this is not consistent in the sample viewed from any one country. As a group these have different approaches to learning but all have a very clear focus which sets them apart from the more generic positioning in other strategy documents. They set out a much clearer learning identity, placing high value on learning and positioning their particular approach or philosophy. The following universities were identified as meeting this criteria (described as a strong learning identity): NMBU, NTNU, Stellenbosch, UNiSA, Northwestern, Duke, UCLA, Tshwane and Pretoria.

The richness of the learning discourse in these documents painted a picture of what learning would be like in these institutions. Whilst the strategy documents are not often explicit about their intended audience, a positioning of the nature of learning enables prospective students to visualise what they will experience and it creates a coherent learning identity for staff and students which may guide decisions to realise the strategic intent. The explicit elucidation of learning could imply that learners are included as one of the intended recipients of the document.

As mentioned above, the attributes of the documents and demographics of the universities were considered to ensure that there was no specific characteristic which might explain the portrayal of learning in the documents. There was no relationship between the size of the university and those classified as having a strong learning identity, with those in this category ranging quite considerably, nor was there any relationship between the student staff ratio and the strong learning identity. All of these strategies position the university as inclusive rather than elite and show a strong commitment of the university having a role in society, however these were not features unique to universities in this category.

NMBU and Stellenbosch describe themselves as learning organisations, the others aren't explicit about this but position their philosophy clearly. For all of the strategies displaying a strong learning identity there is a clear link between their

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stated vision and the style of learning they emphasise. In brief these connections are as follows:

- UNISA is large online university with a clear link to digital learning;
- NTNU purpose is linked to knowledge creation which clearly links to an emphasis on innovative learning;
- NMBU has an emphasis on sustainability which links to lifelong learning.
- Stellenbosch links collaborative learning as the underpinning of its aim to be a learning organisation.
- Northwestern's strategy places a lot of emphasis on connecting with the community and drawing on life experience and for students to put what they learn into experience, which aligns with an emphasis on experiential learning.
- Duke's vision is to "grow, connect, and empower diverse and inclusive communities of excellence to enhance the creation, delivery, and translation of knowledge for a rapidly changing world." (Duke, 2017, p.5) which explicitly links to the positioning of the importance of learning communities.
- UCLA the link to active learning is linked to an agenda to grow student numbers and drive excellence in student education built on "emerging evidence and promising trends in the science of teaching and learning" (UCLA, 2019, no pagination).
- Pretoria espouses an inquiry led curriculum and independent learners which fits with its research focus.
- Tshwane describes itself as a university of technology which matches the stated goal to "Deploy digital and smart technologies to enhance student learning experiences, facilitate knowledge creation, increase engagement and accelerate technology transfer." (Tshwane University of Technology, no date, p.9).

- For NTNU the emphasis is on innovative and scientific learning which aligns with the distinct mission of the university as a university of science and technology.
- Although Agder has a very short document there is a clear link between the stated mission “Co-creation of knowledge takes place when students, faculty and the larger community mutually challenge each other” (University of Agder, 2020, no pagination) and an emphasis on participative and practice-oriented learning.

Table 6.2 shows a statement from each of the strategy documents to illustrate the distinct approach to learning. [Appendix N](#) shows a more detailed table including a short summary of the strategy document.

**Table 6.2: Strong Learning Identity**

University	Learning focus	Statement showing learning philosophy
Norwegian University of Life Sciences	digital and lifelong	<p>“NMBU will offer education and conduct research that encourage lifelong learning. Our efforts will be based on our learning philosophy, highlighting learning as a process and where responsibility for individual learning is central....NMBU will be a learning organisation noted for its inquisitiveness, courage and creativity.” p.6</p> <p>“Digitalisation will promote teaching flexibility and increase access to learning resources for lifelong learning.” p.5</p>
University of Science and Technology	innovative	<p>“We value and encourage innovation among students and staff as well as innovative teaching, research and artistic activities.” p.9</p> <p>“Our learning environment is innovative and exciting” p.15...”our role as a partner</p>

		for innovation is an even more distinctive characteristic of NTNU.” p.15
Stellenbosch university	collaborative	“Collaborative learning provides the basis for the university to be a learning organisation – an organisation characterised by a shared vision, team learning, systems thinking, mental models and personal mastery (Senge, 2006; 2014)”. p.11
University of South Africa UNiSA	digital	“Responsive student-centredness reflects our commitment to recognising, cultivating and promoting the interests and views students especially their lived experiences and prior learning in order to achieve academic access and success in an Open Distance e-Learning context.” No pagination.
Northwestern University	experiential	“Experiential learning is a cornerstone of the Northwestern undergraduate education. Whether it’s producing a live TV broadcast or creating a business plan for an Internet start-up, the opportunity to put classroom course work and academic theory into practice solidifies the learning experience.” p.2
Duke University	learning communities	“Learning communities of faculty, students, and staff are at the core of academic inquiry and, as such, are crucial for the development of students’ intellectual engagement.” P.41...”...  learning communities are described as “a signature of a Duke education” p.41
UCLA	active	“...a program educational excellence and innovation, taking into account projections of growth in the

		undergraduate population to 50,000 over a period of ten years and emphasizing active learning and new ways to think about both the teacher and the classroom.” p.17
Pretoria	inquiry-led	“Developing an inquiry-led curriculum in building the foundation for knowledge, high-level skills and the pipeline of postgraduate students and researchers. Embedding a question-based approach in undergraduate teaching” p.10
Tshwane	digital	“Deploy digital and smart technologies to enhance student learning experiences, facilitate knowledge creation, increase engagement and accelerate technology transfer.” p.9
Agder	participative and practice-oriented	“Ensure that our study programmes have a high degree of varied student participative and practice-oriented learning”. p.1

As can be seen from these examples, this alignment of the approach to learning with the university’s mission creates a sense of what the university prioritises and builds an image of how the learning philosophy translates into the learning experience. These approaches to learning (such as active, digital etc.) are recurrent themes in the majority of strategy documents but what sets these ones apart is a prioritisation or emphasis on a particular approach whereas in others it seems to represent customary practice and contemporary rhetoric rather than a distinguishing feature of their approach.

For example, at Stellenbosch and Duke one would expect the development of relationships, the interaction with peers and between staff and students, to be a prominent feature of the way learning is facilitated. This aligns with collaborative learning theories which emphasise the value of the interactions with others (see chapter 2). Whilst many of the strategy documents mention collaborative learning

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or learning communities, this is often alongside a range of other approaches. What sets Duke and Stellenbosch apart is the emphasis on collaborative learning or communities of learning which suggest higher prioritisation and a greater distinctiveness of this feature which could therefore imply that these institutions are investing greater time and resources to creating these opportunities.

This may contrast with the universities who are accentuating their approach to digital learning which is often linked to greater flexibility in access which might imply more asynchronous content and individualised learning journeys. This does not mean collaboration and interaction will not feature but that the technological aspirations will take precedence in the design.

This level of transparency about the learning identity could enable a more informed choice by stakeholders (particularly students and staff). For example, a prospective student who feels they learn more from doing than traditional lecture delivery might be more drawn to an institution which promotes active and experiential learning. Even where students are not the intended audience of the document, transparency of approach can inform decisions about priorities, investments and longer-term planning.

#### **6.4.2 Homogeneous**

A distinction was made between those with a clear identity and those with a more generalised positioning of learning. In the homogeneous category, learning is still central to the document with many references including areas such as learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. There is a strong commitment to learning in these strategy documents. However, references are very generic suggesting all things to all people and a high level of commonality with other universities and current rhetoric rather than providing a distinctive approach. This may be entirely appropriate for institutions with a broad mission. The result though is a strategy document that could be used to describe learning in all universities rather than for a specific institution. These institutions are: Bergen, NWU, Brown, Cape, WITS, Johannesburg. There was only one US and one Norwegian university in this category with the majority from South Africa.

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For some universities the broad positioning is clearly intentional; for Cape the broad aims fit with a general philosophy for their approach to learning and focus on academic excellence. Cape describes its dream for teaching and learning “to be the top global university in Afrika in the area of teaching and learning” (University of Cape Town, 2021, p.12) and emphasises the importance of pedagogy and a range of approaches to learning.

In contrast, for NWU the positioning seems to be developmental. NWU sets out high importance for learning and is deliberately broad in the positioning because one of the objectives of this strategy is to develop a clear plan to transform teaching and learning. The next strategy document might then be expected to offer a clearer learning identity.

For others though, there is perhaps potential to offer a more distinct positioning. Bergen, Brown, Johannesburg and USN all indicate an area which could be developed into a strong learning identity but currently discuss this in imprecise ways so the positioning lacks the richness of learning identity portrayed by those in the strong category. For example, Bergen has a strong focus on research-led education and could develop this as a strong learning identity if it were more explicit about the learning philosophy underpinning this. It even says in the document that prospective students have an opportunity to “gain an insight into what it means to undertake research-based education.” (Bergen, 2019, p.7) but references to this in the document are all quite generic (which may be deliberate for a top level document) and don’t create an impression of what learning looks like in this environment. Similarly, whilst Brown values student-centred learning and innovative teaching, the document discusses these in quite vague terms. It is interesting that an institution that emphasises its distinctiveness does not offer a clearer view of what learning will be like. In a comparable way, Johannesburg also has a very broad positioning of learning and despite mention of the Fourth Industrial Revolution there is no evidence of a focus on digital learning approaches. USN was less clearly in this category because it only makes 6 references to learning (so was also considered for the weak category) but was included here as the number of references is due to it being a short document but the emphasis on learning and its multifaceted nature is evident. It therefore

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felt appropriate to be included here. Work-based learning is a feature but there is an opportunity to make this a stronger theme in the references to learning.

The university strategies in this category all appeared to value learning and represent an understanding of contemporary approaches to learning in their documents. The question which arises is the extent to which a very generic, almost textbook, positioning of learning offers any insight to the reader.

### **6.4.3 Discrete**

The remaining universities do not position “learning” as a key feature of the strategy document. Turning firstly to universities in the discrete category which describe learning in a distinct way but learning is not highly valued. The Nord document includes only 2 mentions of learning, both about digital learning. The main focus of the document is about how the university can contribute to addressing global challenges and supporting the High North through research and education. There would be an opportunity here to have a strong focus on a learning identity of discovery and inquiry but this is not developed in the document. Similarly for Berkeley, there are only 2 references to learning which are both about learning technologies whereas the strategy places significant emphasis on discovery which could offer a strong learning identity. It is interesting that Berkeley claims to be distinctive through a focus on discovery and inquiry and yet pays little attention to learning. “Students will choose Berkeley because of abundant, accessible opportunities to pursue inquiry, discovery, and creative expression.” (Berkeley, 2018, p.2). The document offers a clear positioning of priorities for Berkeley and this places students very much at the forefront of activity. Students come first in the strategic themes and are mentioned in each section of the document. Students (or student) are mentioned 37 times, the second most frequent word (after Berkeley). It describes ‘discovery’ as the foundation of the Berkeley experience. Discovery, inquiry, creativity, collaboration imply an active learning process. However, the document focuses on experience rather than teaching and learning. There are only two references to ‘learning’ (both for learning technologies and one for ‘teaching’ (including

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stemmed words). The lecturer/teacher/tutor is almost absent from the narrative except from in reference to staff and faculty.

This seems comparable to the way learning is positioned at Stavenger, where there is mention of learning for life and the learning environment but other than a statement “UiS will prioritise student-active and innovative learning, high-quality teaching and activities relating to innovation and entrepreneurship.” it is very outwards facing, commenting on interaction with society and its aim to “be a driving force behind knowledge development and societal change processes.” (University of Stavanger, 2021, p.1).

Neither did these three strategy documents focus on teaching, with no references in Nord’s strategy and one in Berkeley and 2 in Stavenger. Interestingly, they all refer to education more frequently than learning but the overriding messages position their strategic ambitions/objectives rather than elaborating on their approach to learning, resulting in their learning identity not being clearly defined in the document. This raises questions about the intended audience and purpose of such strategy documents which is clearly not uniform across the sector.

These are all relatively short strategy documents so the purpose and intended audience of these strategy documents is perhaps different to those with a lot more detail but it is not the case that all of the shorter documents had less emphasis on learning. In fact shorter documents fell into all four categories.

#### **6.4.4 Weak**

The final category are the strategy documents which make some references to learning but it is not given much prominence in the document. Whilst the intended audience of strategy documents is not usually explicit, the absence of learning suggests students and prospective students are not positioned as important stakeholders in this regard. The size of the documents in this category varies so the lack of references to learning are not solely a feature of these being more concise statements. In terms of word frequency they all mention education more than learning. These strategies appear to be written for an external audience,

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setting out their competitiveness with often elite positioning. The organisations in this category are: Oslo, Johns Hopkins, Princeton, Columbia and WITS.

Learning is not highly valued in the Columbia document. This is a missed opportunity as it has a very clear positioning of its distinctiveness as a liberal arts university and therefore interdisciplinary learning could be shown as a strength. It has the strongest focus on curriculum of all of the strategy documents so it seems strange that learning is not also prioritised.

Oslo's focus is on education and knowledge rather than 'learning'. It seems to rest on its established position for its competitiveness. Oslo positions the role of the university as both for the individuals and for society. It emphasises its inclusive nature but also seeks to position its competitiveness in relation to other universities. The dissemination and utilisation of knowledge is emphasised, and the role of this for society. The aim of document appears to be to establish its reputation rather than to position the approach to learning. Similarly, Princeton is keen to extoll its distinctiveness but this does not extend to a clear positioning of learning. In a 24 page document there are only 14 references to learning. This is surprising when it claims its distinctiveness is a commitment to undergraduate teaching: "Most modern universities are complex enterprises composed of multiple schools and subparts with varying goals and characteristics. Princeton is an exception to this pattern; it is a cohesive institution with a shared and intensely felt sense of mission. People often characterize Princeton's distinctiveness by pointing out the University's deep commitment to undergraduate teaching and the absence of large professional schools." (Princeton, 2016, p.1). However, the references to learning are all amorphous.

Johns Hopkins offers a very lengthy document setting out 10 strategic priorities over 30 pages, and yet 'learning' is only mentioned six times (and teaching eight times). There is significant focus on research and education, "Once we have recruited the strongest possible class irrespective of financial means, we will build the strongest possible connections between our students and our faculty and staff in order to provide a peerless educational experience." (Johns Hopkins University, no date, p.18). It is a highly selective university and places a lot of

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emphasis on excellence and its reputation, “We were America’s first research university, a model emulated throughout the United States, and, more recently, around the world.” (Johns Hopkins University, no date, p.2).

Wits makes some references to learning but is classed as weak as 27 references is very sparse in a very large document and there would be opportunities to place greater emphasis on learning and reflect on a more distinctive identity.

#### **6.5 RQ 4 How does the positioning of learning compare and contrast in three international contexts?**

The size of document was checked to ensure that the positioning of learning was not just a feature of document length and it was confirmed that this was not the case. Document length did not seem to influence the categorisation of learning identity although the length did suggest a difference in approach, and therefore perhaps the purpose of the documents across the 3 countries. South Africa and the US were more likely to have lengthy documents and Norway to have more succinct strategic statements as a trend, although there were exceptions for all 3 countries. South Africa tend to focus on a detailed strategic plan including KPIs and measures whereas Norway generally offer more top level statements. These structural differences could reflect national priorities and context requirements, with Norwegian universities prioritising conciseness and societal mission, and South African institutions addressing more detailed implementation and accountability. In the US, the diversity in document length may relate to the varied nature and size of the sector where the universities in this study are only a small sample making it difficult to assess characteristics across the whole of the sector, whereas for the other contexts the sample is a larger proportion of the HE sector in that country.

In addition, whilst the intended audiences are not usually explicit, shorter, less detailed documents (especially from the US and Norway) seem aimed at external stakeholders, whereas the South African universities, with detailed “teaching and learning” sections, may be trying to address a wider range of stakeholders and social needs. The length and detail of strategy documents may also reflect the degree to which the university sector is supported and where there may be a

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need to articulate and justify its strategic direction. In contexts where universities are actively building their reputation or seeking to grow, such as in South Africa, this could be driving longer, more comprehensive documents, often with explicit key performance indicators and detailed plans. This extensive documentation could be a means to demonstrate legitimacy, accountability, and ambition within a developing system. In contrast, Norwegian universities, operating within a mature sector characterised by strong government support and societal trust, can employ more succinct, top-level statements with less need to provide detailed or overt justification. Their confidence in the sector's established role allows for a briefer articulation of strategy, emphasising broad societal missions rather than granular operational detail. Again, it is more difficult to ascertain a consistent trend in the US documents.

The extent and detail of strategy documents may therefore be contextually significant: where the sector or institution must assert its value and role, longer and more detailed documents are common; where confidence and trust are well established, more concise strategies suffice, reflecting differences in the social and political contexts.

There were some distinctive features to the documents in a national context. Norwegian universities consistently position knowledge at the forefront of their strategic documents. This emphasis is evident in the higher frequency of the term "knowledge" and its prominent placement in opening statements, titles, or vision declarations. This positioning reflects a broader societal mission, where knowledge is seen as the nexus between research and education, ultimately contributing to societal impact and addressing global challenges. Whilst generating, developing, preserving and sharing knowledge are recognised as important roles for universities throughout the sample, on careful examination of the documents, the positioning of knowledge is more prominent in all of the Norwegian strategies. Testing this with word frequency analysis confirms that knowledge has a higher coverage (percentage of the document content) in the 8 Norwegian documents than in any other document. More noticeably, in all of these documents a reference to knowledge is one of the opening statements in the document. This is sometimes the title or strapline, in other cases it is the

opening sentence or a vision statement at the beginning of the document. These are shown in table 6.3

Table 6.3: The positioning of knowledge in the Norwegian strategy documents

University	Example
Stavanger	Vision: a driving force behind knowledge development and change  The University of Stavanger will have an innovative, international profile and be a driving force behind knowledge development and societal change processes.
USN	Title: Knowledge now and in the future
UiA	Vision: Co-creation of tomorrow's knowledge
Oslo	Title: The University of Oslo: Strategy 2030  Knowledge – responsibility – commitment  For a sustainable world
Bergen	Title: Knowledge that Shapes Society
Nord	Opening statement: Nord University will contribute to sustainable development and value creation through research, education, cooperation with society and business, and as a member of the international academic community. We will create new knowledge, educate people who will rise to the challenges of their era, and be a driving force for innovation and democratic development.
NTNU	Title: Knowledge for a Better World
NMBU	Vision: Our vision – Knowledge for life NMBU shall contribute to safeguarding the basis for life in the future through outstanding research, education, dissemination of knowledge and innovation.

This is not to say knowledge is not recognised as important in other strategies but the emphasis given is more pronounced in Norway if the documents are taken

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collectively than in the other two countries. Knowledge in Norway is about the contribution universities make to society. Societal impact is emphasised throughout the wider sample but in Norway this is more explicit and consistent through the explicit positioning of a societal mission. This offers a strong message about the purpose of universities in Norway, knowledge is positioned as the connection between the functions of research and education, drawing these together to create their impact on society and world issues. Whilst none of these positions are unique to Norway, the strategy documents collectively offer a strong message about the way universities are positioning their role. In Norway, higher education is characterised by a strong public system with minimal tuition fees for both domestic and international students. The Norwegian government heavily subsidises higher education, viewing it as a public good and a right for its citizens. This approach has resulted in high participation rates and a relatively egalitarian system. Norwegian institutions are primarily public and the system emphasises research and academic freedom. This emphasis on knowledge within the strategy documents thus aligns with a philosophy of higher education for the good of society rather than individual outcomes. This is further reinforced by the way Norwegian universities positioned their distinctiveness in relation to subject expertise or geographical location. This reflects the specialist nature of some of their provision and the emphasis on their regional impact.

A distinctive feature of the South African context was the conflation of teaching and learning. Interestingly, this was not the case for Norway or the United States. In the South African documents teaching and learning were often conflated so the vast majority of references to learning are for “Teaching and Learning” combining the two concepts. Testing this with word frequency analysis confirms that the South African documents position “teaching and learning” with a higher coverage (percentage of the document content) than in almost all other documents. The only other university featuring highly here is UCLA. The difference between UCLA and the SA documents is that UCLA places significant emphasis on teaching and the references to ‘teaching and learning’ are only a small proportion of these, whereas, in the SA documents the conflation of the two concepts is almost ubiquitous. Interestingly, only UCLA, Oslo, Duke and Brown reference “teaching and learning” outside the SA sample and yet it is very

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prominent within the SA sample. This is also not a feature of other universities reversing the terms and referencing “learning and teaching” as this has very few references throughout the full sample. “Teaching and learning” is positioned as a core function in the South Africa documents. The SA universities generally position strategy within a broader strategic plan document which is often then more detailed in terms of how it has been developed, the positioning of the strategy (related to the external context and particular drivers for the university) and how they plan to achieve their goals. This meant the documents were mainly large or medium in length, and this style contrasted particularly with the more succinct Norwegian style. Teaching, learning and research are described as the core functions of universities. There is positioning of excellence and effectiveness in teaching and learning, approaches to teaching and learning, scholarship of teaching and learning, demonstrating a clear commitment and importance to this aspect of the university’s work.

Whilst knowledge emerged as a key feature in the Norwegian documents, and ‘teaching and learning’ was a characteristic of the South African ones, it was more difficult to highlight a distinctive feature of the US strategies. This is perhaps due to the nature of the sample which is drawn from a much wider and more diverse sector in the US than in Norway or South Africa where the universities perhaps have more in common with one another. Norway and South Africa are all public universities whereas the US has a mix of public and private. The two public universities in the US sample, UCLA and Berkeley have a much higher student population than the others, both over 40,000 students whereas the private ones were often much smaller (see [Appendix D](#)). This difference in size is also reflected in the staff to student ratio with the private institutions generally having a higher staff to student ratio. One area that is noticeable in comparing US the other two countries is the lower acceptance rates, indicating more highly selective approaches to student recruitment. It is interesting the way inclusion is positioned in these documents where they comment on how they aim to increase diversity. Inclusion and diversity are prominent across many of the documents but this is only positioned in financial terms in the US documents. This need to comment on the financial aspects suggests this is much more of a barrier in this environment, which would align with the higher personal costs of HE in this

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context. Whilst they offer financial scholarships and talk about ensuring they recruit the best students regardless of ability to pay, it is less clear how removing a financial barrier at the point of entry addresses deeper societal inequalities that lead to other structural barriers.

Whilst the results of analysis for RQ1 suggested similarities across the whole sample, and RQ2 and RQ3 showed categorisation of learning not bound by national context, this section has highlighted some examples of distinctiveness within the national contexts. Norwegian universities consistently position knowledge at the forefront of their strategic documents. This emphasis is evident in the higher frequency of the word 'knowledge' and its prominent placement in opening statements, titles, or vision declarations. This positioning reflects a broader societal mission, where knowledge is seen as the nexus between research and education, ultimately contributing to societal impact and addressing global challenges. South African universities demonstrate a distinctive approach by frequently conflating 'teaching and learning' in their strategic documents. The phrase 'teaching and learning' appears with higher coverage in South African documents compared to those from other countries. This conflation is nearly ubiquitous within the South African sample, suggesting a holistic view of the educational process. South African universities often position 'teaching and learning' as a core function, emphasising excellence, effectiveness, and scholarship in this domain. This approach is particularly evident in the larger, more detailed strategic plan documents that are common among South African institutions. The positioning of learning in US university strategies is more varied, reflecting the diverse nature of their higher education landscape.

The conflation of 'teaching and learning' in South Africa contrasted with the other contexts, where 'learning' is more often discussed separately; this might indicate different conceptions of where responsibility and agency lie in the educational process. The differences in the way learning is positioned could also be related to the implicit learning theories which underpin the approach, for example, the Norwegian documents guided by social democratic theory (knowledge for societal good) and South African documents by post-apartheid social justice imperatives, while US documents balance prestige and elitism with market

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imperatives. In all cases, the way 'learning' is positioned or omitted could be a proxy for philosophical or ideological beliefs of the national systems influenced by the history and political context.

## **6.6 Summary of the argument presented in this chapter**

In this chapter the analysis demonstrates that while the strategic positioning of learning varies in the sample, there is a broadly shared conception of universities' core purpose, combining education and research in service to society. I showed that by examining the strategies through the lens of learning theory it revealed that, although explicit theoretical references are rare, there is an implicit and pervasive alignment with established learning theories. Common features show a view of learning as active, collaborative, and future focused. The typology of learning identities derived from the analysis categorised universities as: strong, weak, discrete, or homogeneous. This offered a way to distinguish how prominently and distinctively learning is represented, highlighting that these differences cannot be explained by institutional or national characteristics alone. The subsequent comparison across the three contexts showed that, despite some distinctive emphases (such as the Norwegian focus on knowledge as a societal good or the South African conflation of 'teaching and learning'), the similarities in how learning is positioned outweigh the differences. My overall argument, therefore, is that the way learning is framed in these strategic documents reflects a shared global narrative of the university's role which is nuanced by local context and styles of document. Therefore, to understand both the commonalities and the divergences requires connecting theoretical perspectives on learning with the strategic discourse in each institutional and national setting. My study aimed to achieve this and although the analysis reveals significant complexity and it is therefore important not to over generalise, by adopting a number of different approaches relevant to the research questions, it offers a rich narrative of the way learning is represented in the strategy documents.

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## **Chapter 7: Discussion**

### **7.1 Introduction to the chapter**

This chapter explores the contribution this research makes to extant literature in the field of higher education; it synthesises the outcomes of this study with the literature review, offering insights into the strategic positioning of learning in universities through an analysis of their strategy documents. There are significant commonalities in how institutions articulate their roles and priorities, highlighting the importance of language in shaping perceptions of learning and institutional goals. The chapter explores why this research is important and how it contributes to our understanding of higher education priorities and the positioning of learning within strategy documents. The key learning theories that influence the current dialogue within universities are explored, considering how these theoretical frameworks shape strategic planning and educational approaches. Through a discussion of learning identities, the chapter critically evaluates the position of learning and the underlying premises that guide strategic decision making in higher education. Finally, before offering reflections, there is discussion of the cross-cultural contexts and how these influence the institutional values and educational objectives.

### **7.2 A confident and consistent definition of the role and value of universities with three inter-related missions**

The research revealed that universities in the sample presented a confident and consistent definition of their role and value. This finding demonstrates how institutions articulate an assured narrative about their significance, with the omnipresence of three missions: education, research, and contribution to society. This confident positioning represents an important original contribution to understanding how universities respond to contemporary challenges about the value of higher education, negative media rhetoric, and concerns about neoliberal and managerial influences.

This confident and consistent articulation provides an important counter view to Collini's (2017) assertion about disorientation in the sector and societal uncertainty regarding university roles. At least in the strategy documents, the

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research found that rather than confusion, institutions offered a confident and ambitious view of their purpose. This study empirically demonstrates and extends Sutphen, Solbrekke and Sugrue's (2019) proposition about universities expected societal contributions by showing not only that societal contribution is emphasised, but that it has become structurally integrated as a core strategic mission across contexts. The consistency across three different contexts, despite some country specific features, provides empirical evidence of shared understanding about university value that transcends national boundaries.

The findings showed that while economic considerations appear in strategy documents, they do not dominate or obscure core university missions. This discovery offers a significant contribution to debates about neoliberal influence in higher education. Despite criticism of neoliberal economic discourse framing educational agendas (Marginson, 2013), this analysis found no evidence of such dominance in the strategy documents. Nor was the positioning of universities as places to train individuals for jobs and focus on graduate outcomes and income, that is often represented in the UK media and government discourse, dominant in the strategies. To some extent the role of the university as portrayed in the documents offered a counter position to a popular narrative which Ashwin (2020) notes is often overshadowed by economic considerations. These considerations were apparent, especially in the documents offering a more detailed strategic plan, but they did not obscure the key aims of the university. This contradiction highlights a structural misalignment that the literature has not adequately accounted for, signalling a need to revisit funding theories in relation to institutional self-positioning. Similarly, Ball's (2017) description of 'academic capitalism' did not obscure more traditional notions of higher education. Instead core activities of education, research and a contribution to society were consistent across the sample. So whilst these challenges are present in the wider discourse of higher education it was encouraging to see the way the universities position themselves in their strategy documents showed core activities of education, research, and societal contribution remained consistent across the sample, suggesting universities maintain their foundational missions while acknowledging economic realities. Although, it cannot be denied that the level of strategic planning portrayed in the documents aims to increase managerial

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control in universities in line with a trend previously noted by Stensaker and Fumasoli (2017).

The research identified ubiquitous presence of the third mission across all strategy documents, representing a significant finding about contemporary higher education. This universal adoption moves beyond traditional research and education missions, introducing emphasis on knowledge transfer and relationships with external stakeholders. The consistency of this positioning suggests the third mission is now widely accepted as a fundamental university purpose, supporting Compagnucci and Spigarelli's (2020) position while providing empirical evidence of its widespread implementation. This finding contributes to understanding how universities integrate their different strategic arms, bringing together education, research, and wider community engagement. The third mission did not detract from the importance of research and teaching but rather became a nexus integrating the aims of education and research for the good of society, with knowledge creation and dissemination playing a crucial role. While Rhoads and Torres (2005) suggested competition-based reform drives universities toward serving economic wellbeing, the research showed this integration transcended simple economic motivations, positioning universities as problem solvers for global and local challenges. This offers a very positive view of the importance of universities for society and addressing the World's problems. It supports traditional notions of university education but perhaps recognises a shift to give greater weight to the external environment, rather than a focus on the intrinsic value of learning. This allies with Tight's view (2012) of international concerns for HE, which was evident in the strategy documents presenting a robust argument for the global impact of universities. If as Winstone (2022) suggests, the strategy of universities display what the institution values, then the documents espouse an assured set of principles describing the significance of HE. Further, if as Stensaker et al. (2019) suggest that strategic plans are used to build legitimacy, the assured and congruent positioning of the value of universities in their strategy documents could also be communicated more widely as a louder voice defending universities in the current political and economic context.

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What is perhaps more surprising is the extent to which the third mission transcends different funding regimes. The strong focus on societal missions in Norway aligns with a funding regime valuing education and offering financial support, however, it sits less easily in regimes where there is a heavy individual cost. If all universities accept the societal benefits of their endeavours and education is viewed as a public good, there needs to be further consideration of how it is funded. Government funding of higher education, such as the case in Norway, is justified by its wide-ranging economic and social benefits, and its contribution to research and innovation. Whilst a multifaceted approach to funding, recognising education as both a private and public good, probably warrants a balanced funding model in most economic contexts, the shift in emphasis of this third mission for universities has not been accompanied by a re-evaluation of who bears the cost. University strategies, and the articulation of these in strategy documents, could therefore have a potential role to support the HE sector in articulating the value of HE (beyond that to the individual) and imploring governments for investment. A particularly significant finding therefore emerged in the research regarding the relationship between mission articulation and funding models. The research revealed that strong focus on societal missions appears consistently across different funding regimes, creating an apparent contradiction. While this alignment fits naturally with Norway's funding regime that values education and offers financial support, it sits less comfortably in systems with high individual costs. This finding makes an original contribution by highlighting a fundamental tension: if universities universally accept societal benefits and view education as a public good, current funding approaches may be misaligned.

The research found evidence supporting Gibbs et al.'s (2000) assertion about strategic thinking becoming fundamental to universities, demonstrated through the breadth and depth of strategies and positioning of responses to changing contexts and increased competition. The findings extend this understanding by revealing how student education strategies function within broader institutional positioning. Student education strategies have previously been shown to play an important role in the scrutiny and improvement of teaching in HE and in the creation of pedagogic identity (Clegg and Smith, 2010). The impact of the

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strategy on practice was beyond the scope of this study but for it to guide teaching and learning there needs to be careful consideration of the way student education is positioned within the documents to speak to internal stakeholders. Sandvoll (2015) found the introduction of a strategy was not viewed by stakeholders as impacting on teaching and learning activities, but it had triggered pedagogical discussion. This would require a clear articulation of the university's approach which will be discussed below in relation to the way 'learning' is positioned and the extent to which a theoretical position is articulated. The distinctiveness of individual institutions and their educational ethos is also important for this point and will be discussed in relation to learning identities below.

The research identified a significant gap in clarity regarding intended audiences and purposes of the strategy documents. This gap suggests an underexplored dimension of strategic communication effectiveness in HE, revealing potential disconnect between intended audiences and institutional narratives. While the relationship between internal characteristics and external environment was clearly articulated, supporting Zipparo (2023), confusion about document purpose emerged as a key finding. This discovery contributes original insight about the effectiveness of strategic communication, highlighting uncertainty about whether documents primarily address internal policymakers with external publication for transparency, or target specific external stakeholder groups. A clear statement of the purpose of the document would be helpful together with consideration of whether there should be different versions for different audiences.

This section examined how university strategy documents articulate the role and value of higher education institutions. The study revealed a confident and ambitious narrative about universities' role and societal contributions, challenging notions of sector disorientation. The documents consistently emphasise three core missions: education, research and a contribution to society. This robust portrayal of a third mission of knowledge transfer and external relationships as a nexus for research and education, suggests that while economic considerations are present, they do not overshadow traditional educational values. The strategies serve to build legitimacy and articulate universities' importance in

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education, research and addressing regional and global challenges. However, the shift towards emphasising societal benefits raises questions about funding models and who bears the cost of higher education. The section also highlights the role of strategic thinking in shaping pedagogical identity and improving teaching practices, while noting the need for clarity regarding the intended audience and purpose of these documents. Taken together, these findings not only counter claims of sectoral confusion (Collini, 2017) but also qualify neoliberal critiques (Marginson, 2013; Ball, 2017) by demonstrating that managerial influences coexist with a strong articulation of core academic missions.

### **7.3 An implied although rarely explicit link to learning theory**

This section reflects on the exploration of learning theories in strategy documents, examining the research findings that revealed implicit alignment with established learning theories but very few explicit references. The prevalence of the ideas represented by the themes help paint a picture of learning in contemporary higher education. The research identified five key themes that emerge from the wider sample, these did not reflect an individual country specific focus and therefore make a contribution to the literature by providing a helpful articulation of what the current nature of learning looks like in global higher education. However, whilst the research provided evidence of some clear themes which related to different theoretical positions there were very few explicit references to learning theory and I argue for a clearer theoretical underpinning for strategy in higher education.

The theoretical framework established a lens to identify overt and underlying theoretical orientations within the strategy documents. I have argued that by grounding their practice in established learning theories, educators in higher education can create more effective, engaging, and adaptable learning environments that cater to diverse student needs and promote deeper understanding. Further, having a clear focus on an approach to learning with an underpinning learning theory provides an evidence-based approach to designing and delivering learning. However, whilst some commentators have stressed the importance of this theoretical underpinning, there is scant evidence of this

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expressed in the documents. The finding that learning theories are implied but rarely made explicit in university strategies is important because it exposes a fundamental weakness in the way institutions position themselves. By relying on rhetorical claims rather than clear scholarly grounding, universities risk undermining their legitimacy and credibility in shaping educational approaches. This lack of explicit theoretical underpinning also creates a disconnect between strategy and practice, as progressive ideals are articulated without offering staff meaningful guidance for implementation. Moreover, it highlights a paradox at the heart of higher education: while universities foreground research as essential in other domains, they potentially neglect to apply the same rigour and evidence-based foundations to their own pedagogic frameworks (although it is noted that this may exist elsewhere but is not referenced in the strategy documents). This aligns with Gouthro's (2019) concern about the reduction in the attention applied to theory in adult education but extends this to a specific focus on strategy documents. Similarly, it supports Illeris' (2016) call for a better understanding of learning and raises concern about the neglect or tangential approach to learning theory. A better understanding of learning theory could ensure a focus beyond outputs to understand the best way to design education to help people learn. However, whilst learning theory could be implied to have an influence in all the documents (see discussion below), explicit references to learning theory were quite rare. Noticeably, references to theory in general are largely absent, not just in relation to learning, and the majority do not espouse specific theories in relation to their approach to learning. Stellenbosch University on the other hand make a perspicuous argument for having an explicit theoretical underpinning (2018, p.7) "adopt relevant theoretical frameworks which will create a basis for shared understanding at SU." By making learning theory, or research underpinning an approach espoused by an institution more overt, these theories could inform the design and delivery of HE in more consistent ways, leading to further research and scholarship to test the theories rather than often small-scale studies and dogma being given too much weight. This presents a more evidence-based cycle so theory can influence pedagogic strategy in the way Gouthro suggests (2019). Similarly, like Brookfield (2004) argued that a theoretical underpinning enables educators to justify their approach, the same could be true of institutions.

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Furthermore, a well-founded approach to learning could guide teacher education programmes away from what Hattie and Donoghue (2018) suggest are too driven by content delivery and be used to recruit academic staff whose approach aligns with the institution. My study extends the discussion about the role of theory by providing comparative, cross-national evidence that this is a structural sectoral issue in strategy documents.

However, whilst explicit theorists are rarely mentioned, there is clear alignment between the discourse in the strategy documents and established learning theories and current research. The research identified five key themes that reveal how universities conceptualise learning: learning as an active process (emphasising constructivist and experiential approaches over traditional transmission methods), learning as a shared endeavour (highlighting collaboration, community, and partnership despite individual assessment structures), learning as future-focused (emphasising innovation, transformative learning, and societal impact), learning as requiring challenge (maintaining traditional academic rigour through critical thinking and independent inquiry), and learning as a process (incorporating pedagogy, digital tools, and flexible delivery methods). While these themes align with established learning theories including constructivism, social learning theory, transformative learning theory, and andragogy, the terms are used colloquially rather than being explicitly linked to theoretical frameworks, suggesting implicit rather than overt theoretical grounding in university strategies. By mapping the implicit theoretical positioning of university strategies, this research contributes to a prior gap in our understanding. These five themes collectively describe the current position of learning in higher education and create a useful framework for future research.

The significant emphasis on active and collaborative learning espouses a student-centred and creative approach to learning and it would be interesting to explore the extent to which students would describe their education in this way. It certainly represents an ideological position which reflects a turn in HE to considering more effective ways of facilitating learning. Moreover, current debates reflected in published research and scholarship into teaching and learning connect with the propositions in the strategies, such as greater

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consideration of issues related to diversity and inclusion (Smith, 2014); the role of technology in widening access (Trow, 2000); creation of learning communities (Carrino and Gerace, 2016); the value of a more student-centred approach rather than teacher-focused approaches of traditional university education (Prosser and Trigwell, 2014); co-creation or students as partners (Matthews et al., 2018) ; informal learning opportunities, developing the student outside of the classroom through a variety of learning experiences (Carrino, Sedberry and Gerace, 2016); and empirical evidence connecting collaborative learning and higher student performance outcomes (Lee and Yang, 2023).

The exploration of learning theories in higher education strategy documents reveals a critical insight into the current state of educational approaches. The strategy documents consistently highlight several recurring themes that align with established learning theories and current research. These include a focus on active learning, collaborative approaches, and transformative education. For instance, there is a significant emphasis on student-centred and creative approaches to learning, which reflects a shift in higher education towards considering more effective ways of facilitating learning. In contrast, traditional lectures still dominate much university delivery and yet it is well established that sitting and listening is not effective for long periods of time. Yet, this traditional style of HE is largely absent from the strategy documents, and this surfaces a potential disconnect between the persistence of traditional teaching methods in universities, despite evidence of their limitations, with the progressive discourse found in institutional strategy documents. A question of rhetoric versus reality also arises in the increased focus on collaborative learning which is seen in many of the documents. This could be viewed as greater focus on collective views of learning, which could be argued to align with non-western contexts where there is recognition of holistic learning in other cultures, but this does not align with the heavy individual financial burden of studying in some of these contexts or the very individual nature of assessment which are arguably more appropriate in a competitive rather than collaborative approach. Genuine credence to the value of collaboration would require a different approach to judging success rather than the reality of individual metrics of success often prioritised in universities. This surfaces a discursive gap between how universities talk about learning and how

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it is structured and delivered. This extends the literature and highlights an opportunity for future research to explore this dimension in strategic communication.

The focus on transformative learning and intellectual inquiry are perhaps less surprising as they speak to traditional notions of a university as a place of reasoning and critical thought as envisaged by Kant (cited in Willetts, 2017). Mezirow's positioning of transformative learning changing "problematic frames of reference (mindsets, habits of mind, meaning perspectives) – sets of assumptions and expectation – to make them more inclusive, discriminating, open, reflective and emotionally able to change." (Mezirow, 2018, p.116) offers a potential way of linking the traditional meaning of a university education with the current focus on the good for society. So whilst Merriam (2018) surfaced criticisms that the notion of transformational learning can pay insufficient attention to political and social contexts for learning, imagining the concept in relation to the role universities have to play in solving current and future world issues, could reframe the inherent critical reflection as advantageous to both internal and external transformation. However, referencing transformational learning in a strategy document can merely be an easy rhetoric whereas delivering transformational learning in a sector increasingly concerned with economic matters (as referenced by Ashwin, 2020) may be more of a challenge.

The reflections on learning as a process including modes of delivery and pedagogic approaches could reflect the changing "ecology of higher education" (Collini, (2018, p.1) and a need to do things differently in response to changing political, social, and economic influences such as increased participation rates, changing demographics, and other contextual factors (Altbach, Reisberg and Rumbley, 2019). This is an interesting juxtaposition to Molesworth, Nixon and Scullion's (2009) concern that the growth and marketisation of HE creates a pedagogic constraint. The need to address a changing context appears to be driving greater concentration on the approaches to teaching and learning. Similarly, technological advances are offering opportunities to examine the role of the teacher in these interactions and certainly the espoused position is that this creates opportunities for HE rather than constraints (for example, Norwegian

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University of Life Sciences, 2019, p.5 “Appropriate educational use of new digital technology will help boost quality, customised learning environments and improved learning outcomes. Digitalisation will promote teaching flexibility and increase access to learning resources for lifelong learning.”)

Overall, the response to the research question exploring whether underpinning learning theories are evident in the published student education strategies of universities is complex. Interestingly, while learning theories seem to influence the content of these strategy documents, explicit references to these theories are quite rare. Only a few institutions directly cite research or specific learning theories to support their proposed approaches. This lack of explicit theoretical grounding is noteworthy, as it could potentially hinder the consistent and effective implementation of these strategies. Ultimately, this analysis argues for a clearer theoretical underpinning for strategy in higher education. By making learning theories and research more explicit in institutional strategies, universities could create a stronger foundation for designing and delivering higher education. This approach would not only inform the design and delivery of education in more consistent ways but also lead to further research and scholarship to test these theories. In doing so, institutions could move away from small-scale studies and ideology, towards a more evidence-based cycle where theory directly influences pedagogic strategy.

This study makes an original contribution by empirically mapping the implicit theoretical orientations of university strategies and demonstrating a significant gap between progressive, theory-aligned rhetoric and the absence of explicit theoretical grounding. While implicit alignment with learning theory exists across the strategies when they are taken collectively, explicit theoretical frameworks were rare. This highlights a paradox in higher education where institutions promote innovation and evidence-based practice in other domains yet often neglect to apply clear theoretical foundations to their own pedagogic strategies. By surfacing this gap, the research contributes to the literature by proposing that this represents a significant opportunity to reconceptualise how learning theory informs institutional strategy, ensuring stronger alignment between discourse,

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pedagogical practice, and sectoral legitimacy, and ultimately strengthening evidence-based approaches to contemporary higher education.

#### **7.4 The importance of language and the development of a typology for learning identities**

In this section I address the language of learning, and why examining its positioning in the strategy documents offers a legitimate perspective on the esteem and nature of it in the organisation. The development of a classification of institutional learning identities is perhaps the most significant outcome of the research. This offers a way to position the importance of learning in the document and advocate for clearer strategic positioning of learning. While previous work has critiqued the overuse or ambiguity of 'learning' in HE discourse (Biesta, 2009), this study extends the debate by developing a practical typology of learning identities that empirically categorises how institutions strategically articulate learning.

Firstly though, the importance of language. Scrutinising the word 'learning' in the documents illuminated how it was positioned, the relationships between concepts and its level of prominence. By analysing the prominence and relational use of 'learning' across strategies, this study demonstrates how language shapes institutional priorities and signals epistemological orientations, thus extending earlier work from philosophical critique into empirical sector level evidence. There is debate surrounding the term 'learning' in higher education reflecting the evolving nature of educational philosophy and practice, examining its position in the documents therefore contributes to this debate by showing how learning is defined and understood within the context of higher education. This discourse encompasses various perspectives on the purpose, process, and outcomes of learning in HE. Biesta (2015) notes that learning refers to the process and the outcome of that process and suggests this leads to confusion in discussions. Indeed, he criticises the 'learnification' where the language of learning (learners, learning environments, lifelong learning) has become so pervasive in education (Biesta, 2009). However, in strategy documents my findings show something different, where despite the pervasiveness of 'learning' terminology, some

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institutions avoid it or substitute ‘education’ or ‘knowledge’, suggesting uneven adoption rather than uniform ‘learnification.’ This nuance is an important addition. However, taken collectively the documents align with what might be expected and show that learning is multifaceted and complex, as is evidenced in the strategy documents, with references to learning environment, learning outcomes, learning experiences, approaches to learning and learning methods. Notions of learning as the acquisition of knowledge and skills are evident; and as would be expected in an HE context, contemporary perspectives expanding this definition to include personal development, critical thinking, and the ability to apply knowledge in real-world contexts also shines through. The terminology is significant, and the positioning reveals what the institutions portray as important. Scott (2021, p.293) contends “learning and knowing are homologous concepts”. I disagree; knowledge may be the outcome of learning, but it is not a process in the same way as learning. Ideas such as learning gain (McGrath et al., 2015) attempting to quantify the value added by higher education, need to be examined and critiqued. It matters that some documents talk about education or knowledge but make few references to learning itself. It is also interesting how the analogous positioning of universities in many of the strategy documents extends to the way learning is represented. This could signal a level of accord across the sector but warrants more detailed examination. The adoption of a typology of learning identities, constructed from an examination of the discourse of ‘learning’ enables this more refined analysis and therefore presents a new perspective to the existing literature. The typology could be used to analyse other strategy documents and therefore categorise universities outside of the sample using a consistent framework.

The typology of strategies into four categories provides a new perspective to the existing literature on university strategy by enabling the complexity of 24 strategy documents to be understood through a clearer categorisation of how key features of learning are espoused. Beyond offering a refined lens on the sample, the typology develops an analytical framework that can be applied comparatively across institutions and national contexts. This makes it useful for scholars seeking to interrogate institutional discourse, for policymakers aiming to understand sectoral positioning, and for practitioners reflecting on their own

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strategic approaches. In doing so, it not only highlights tensions between universities' espoused learning identities and their pedagogical practices but also offers a tool to examine broader patterns of convergence and divergence across the sector.

### **7.5 The value of a strong learning identity**

In the context of higher education institutions, I argue that the development and articulation of a strong learning identity within university strategy documents can offer a significant advantage. This section of the discussion chapter explores the importance of a distinctive learning identity and its potential impact on various stakeholders. It posits that the university strategies in the strong learning category could be used as a model for other institutions wishing to enhance their distinctiveness in an increasingly international and competitive market.

Turning then to what the study reveals about the universities in each category, it is clear that while a strong focus on learning, as seen in both strong and homogeneous categories, helps keep learning central to the social reality and identity of universities, a clear learning identity articulated in the strategy goes further. It explicitly states what forms of learning are valued and underpin the approach within a particular institution. Articulating the uniqueness and priorities of a university are stated as one of the aims of these type of documents (Winstone, 2022). In essence, while a homogeneous approach speaks to the role of learning in universities generally, a strong learning identity speaks to the specific role of learning within a particular institution. Universities that offer a unique perspective on learning demonstrate how it relates to their broader strategic goals, thereby highlighting its importance and clearly positioning the type of learning prioritised within their institutional context. This level of clarity is crucial if strategy documents are to effectively guide decision-making processes within the institution, and as Fumasoli and Lepori (2011, p.157) state "to select a portfolio of activities and find an appropriate position in the higher education system". It was encouraging that most university strategies (16 out of 24) placed a strong emphasis on learning, but arguably a truly convincing learning identity requires a distinctive approach that goes beyond common rhetoric. While this

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study is limited to the analysis of strategy documents and cannot determine the extent to which these identities align with institutional realities, it is reasonable to assume that a clearer identity will influence practice.

Strategy documents show the characteristics, goals and resource allocation for a university (Morphew, Fumasoli and Stensaker, 2018), so a strong learning identity could denote a prioritisation of particular approaches to learning, potentially leading to targeted investments and the development of specific expertise within the institution. This level of clarity also guides internal stakeholders to make decisions about approach, priorities and the design and delivery of education. Thus fulfilling the role Sutphen et al. (2019) suggests of a publicly available expression of how internal stakeholders are expected to make a contribution to the university's obligations to society. Further, aligning with Gouthro's (2019) example that course design will be governed by the strategy of the institution. Indeed, returning to Chomsky's question "is the role of education to transmit and accumulate intellectual goods OR to create space for inner-driven creativity and the capacity to master information". (Chomsky cited in Bélanger, 2011, p.47), a clear articulation of learning identity enables all stakeholders to understand how the university positions itself on this spectrum.

It wasn't clear whether students were one of the intended audiences for the strategy documents and in previous research Smith (2008) suggested they had low agency in learning and teaching strategies, but if we accept students and potential students as key stakeholders, they are recipients of the strategy even if it is not intended to address them directly. A well-defined learning identity presents different facets of the learning experience and should feed from the strategy document to other expressions of this approach within communication and decision making. This allows students to make informed choices between institutions based not only on location and subject matter but also on the type of learning experience they can expect. By providing this additional dimension for decision-making, universities with strong learning identities empower students to select institutions that align with their preferred learning processes as well as their disciplinary interests. Moreover, a strong learning identity may be a relevant factor in attracting international students. Research has identified academic

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branding as one of the influencing factors in university selection (Drori, 2015), suggesting that a distinctive learning identity could provide a competitive advantage in the global higher education market.

Universities, by their nature, should be learning organisations. For those with a strong learning identity, an underpinning of learning theory is more easily discernible. This theoretical foundation can guide the institution's approach to teaching and learning, potentially leading to more coherent and effective educational practices. Thus, the strategy helps the institution have an active role in shaping their position (Zipparo, 2023). While common theoretical underpinnings may represent current issues within the higher education sector, an overly homogeneous approach risks valuing learning without offering a clear direction. However, it is important to note that in large universities, a single approach may not be appropriate, and a homogeneous positioning may serve as an umbrella for more defined approaches at faculty or disciplinary levels. This consideration is beyond the scope of this study but warrants acknowledgment. Interestingly, some universities in the homogeneous category have strategies that imply a more defined learning identity could be made explicit. For instance, one institution states, "The more we know about how adults learn, the better we can design learning activities that facilitate learning and the better we can prepare adults to live full and engaging lives in today's world." This suggests that within seemingly homogeneous approaches, there is potential for developing a stronger, more distinctive learning identity.

Dafermos (2023, p.18) talks about learning being replaced by commercial concerns where "The neoliberal university landscape has become the site of novel fetishes such as 'excellence', 'top ranks', 'world-class', etc." and whilst this discourse was present in the documents, it was pleasing to see 'learning' was still prominent in the majority. This is important because as well as representing how some actors view and portray the university, the language shapes the way universities are seen. So our social reality is shaped by the way universities are represented in dialogue and texts. The language used in many forums/UK newspaper bears little relation to earlier ideas about what a university should concern itself with. There has been insufficient challenge to new ways of talking

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about universities and this means it becomes accepted as a social reality, that universities are here to train people for jobs, that the value of a degree can be assessed like a return on investment. For those universities in the discrete or weak categories, where learning gets scant mention, this may be worthy of further reflection: what does it say of a university that doesn't place learning central to the way it describes itself? How can learning be a priority if it isn't featured in the strategy document?

In summary, this section argues that a strong learning identity offers numerous advantages. It provides clarity for decision-making, empowers student choice, potentially influences practice and investment, and may enhance the institution's appeal in the global education market. As such, the development and articulation of a distinctive learning identity should be considered a valuable strategic goal for higher education institutions seeking to differentiate themselves and provide a clear vision for their educational mission. The categorisation provided in this analysis presents useful examples of how universities can position a strong learning identity for different areas of focus, thus providing some good practice examples.

## **7.6 The value of learning transcends different environments**

The international differences revealed in this research illuminate how national contexts, educational drivers, and historical legacies shape institutional strategic positioning. While further research would be required to explore the comprehensive links between strategy document content and wider contextual factors, including different funding models, the characteristics of the national contexts (as explored in the case studies in chapter 4) were clearly aligned with the analysis outcomes. My analysis extends prior national case studies by demonstrating that despite wide contextual variation, universities share remarkably consistent conceptions of learning, revealing a transnational discourse that may underpin future comparative research and policy.

Norway's focus on knowledge and societal mission aligns distinctly with the country's social democratic approach to higher education. As Damsa et al. (2015, p.8) note, "education contributes to the democratic values in society," reflecting

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how Norwegian higher education remains embedded within broader national ideals emphasising equality and democracy. This social purpose orientation helps explain why Norwegian universities present brief, high level strategic statements focused on their societal role rather than detailed operational plans. The consistency across Norwegian institutions suggests strong governmental influence and common regulatory expectations about strategic positioning. While Saarinen and Taalas (2017) suggest that political demands for increased internationalisation could present a threat to traditional ideals through marketisation pressures, this research did not find evidence of such tensions in the Norwegian strategy documents. Rather, the findings aligned with Ramezani and Golafruz's (2023, p.16) analysis, which concluded that "among the Scandinavian countries, Norway appears to be the country most reluctant to pursue a market-oriented policy," with Norwegian institutions maintaining their commitment to social democratic values and societal mission focus. As shown in the results, societal impact is emphasised throughout the wider sample but is more consistent in the Norwegian context through the explicit positioning of a societal mission. The strong message about the purpose of universities in Norway, with a particular emphasis on knowledge creation aligns with a confident system with government funding and free and equal access to education. The view of universities contributing to society and having a positive impact on world issues aligns with Ashwin and Case's (2018) positioning of the Nordic emphasis on equal access to educational opportunities as part of a broader political agenda to create an egalitarian society.

The US presents a contrasting picture of diversity and complexity that explains the varied strategic approaches observed. This aligns with Collini's (2018, p.28) point that "there is no 'system of higher education' in the US: the ecology is diverse and complex." This fragmentation means that even within the elite university sample examined in this study (drawing on Taylor and Cantwell's categorisation, 2019) there are fewer commonalities than seen in the other two countries. This reflects the absence of centralised governmental influence or regulatory frameworks that might standardise strategic expectations. The US emphasis on institutional autonomy and minimal governmental control, combined with what Collini (2018, p.213) describes as "huge concentration of resources

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and talent in its major research universities," creates space for diverse strategic approaches. It could also reflect the multifaceted system with significant institutional autonomy and Kerr's (2001) description of the 'multiversity' within this context.

The detailed strategic planning approach observed in South African higher education institutions reflects a consistent commitment to transparency and accountability, with comprehensive documents including explicit key performance indicators readily available on institutional websites. This extensive documentation appears to serve multiple purposes within South Africa's unique post-apartheid context, where the system continues to grapple with extreme inequality both within society at large and within the higher education sector (Ashwin and Case, 2018). The emphasis on detailed implementation plans and accountability measures can be understood as institutions' attempts to demonstrate legitimacy and ambition within a developing system that is seeking to address imbalances in access and completion but where the legacy of apartheid is still visible (Ashwin and Case, 2018). Given successive governments' efforts to build a developmental state following apartheid's end (Naidoo and Ranchod, 2018), and persistent claims that higher education policies have failed to effectively address apartheid's inequalities even two decades later (Mabokela and Mlambo, 2017), the comprehensive strategic planning and high level of transparency suggests strong national oversight and key drivers focused on developing the higher education sector as part of broader transformation goals. This strategic approach appears to be both a response to historical inequities and a mechanism for demonstrating institutional commitment to systemic change and development.

A further distinctive feature of the South African context was the conflation of teaching and learning. Dewey (1933) defined the relationship between the terms using the analogy of buying and selling but others have challenged the automatic connection between the concepts (Biesta, 2015). It was interesting therefore that this conflation arose within the South African context and not within the other two case studies. One of the critiques of conflating the terms is that learning is viewed as "regulated and controlled by the teacher" (Edwards, 2006, p.124). This is

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important in relation to this project looking at the position of learning in the documents as Edwards suggests “In other words, “and” is unbalanced insofar as the link mystifies the primacy of learning and the learner in discourses of teaching and learning” (Edwards, 2006, p.125). Further, Williams (2012, p.301) argues for a separation of the concepts so that learning can be understood “on its own as an agential activity with structural consequences”. The fusing of the terms may therefore be significant and be an indication of the way higher education is viewed or legitimised in a system which is still developing but will be less prominent in other more established HE systems.

Despite some of these distinct features in the structure and style of the strategy documents portraying the influence of national contexts, when viewed through a lens of learning theory the commonality rather than the difference across these contexts is more noteworthy. There are prevalent themes about the way learning is positioned: learning is an active process where students construct knowledge through experience; learning is a shared endeavour emphasising collaboration and community; learning is future focused on innovation and transformation; learning requires challenge through critical thinking and inquiry; and learning is a process encompassing pedagogy and delivery methods. This offers a helpful articulation of common features of learning in higher education. Similarly, the universities identified as having a strong learning identity came from all three national contexts. The problem spaces in international HE perhaps therefore relate more to issues such as global reach and funding rather than to central concepts such as learning. This study therefore offers a distinctive cross-national perspective by demonstrating that despite diverse national contexts, historical legacies, and funding regimes shaping university strategies, there remains a striking convergence in core conceptions of learning. The commonality highlights a transnational discourse that transcends political and cultural boundaries. By integrating detailed contextual analyses from Norway, the US, and South Africa with thematic exploration, this research advances understanding of how global influences and local particularities interact to shape higher education learning identities. These insights provide a valuable foundation for comparative scholarship and suggest that higher education policy and practice can benefit

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from recognising both unique national characteristics and shared pedagogical priorities across international contexts.

### **7.7 Summary of the argument presented in this chapter**

This chapter discussed the key findings that reveal a confident and ambitious narrative within university strategy documents, where institutions articulate a clear and consistent understanding of their role and societal contributions. This challenges prevailing literature that suggests sector disorientation and uncertainty about university purpose, notably contrasting with Collini's (2017) portrayal of confusion while aligning with Sutphen et al.'s (2019) emphasis on societal contributions. Building on this, the research identifies a prevalent narrative about learning across diverse contexts, evidenced by common thematic patterns that align with established learning theories. Though notably there is a lack of explicit theoretical references which highlights a significant gap and leads to a key argument for embedding clearer learning theory foundations within university strategies. Additionally, the chapter advances understanding by introducing the concept of strong learning identities, proposing that such identities provide individual universities with strategic clarity, distinctiveness, and competitive advantage. Together, these findings extend the field by offering an empirically grounded typology of learning identities and by revealing a transnational discourse that unites diverse higher education institutions while underscoring the need for more explicit theoretical and strategic coherence in higher education policy and practice.

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## **Chapter 8: Conclusion**

### **8.1 Summary of the thesis**

My thesis investigates the strategic positioning of learning within universities by analysing their strategy documents. Through qualitative analysis of twenty-four institutional strategies across three national contexts, the research explores how universities articulate their core roles and priorities, the extent to which learning theories underpin these strategies, and the ways in which 'learning' itself is positioned. The study places particular emphasis on how language shapes perceptions of learning and reveals both the influence of national context and the powerful global convergence in the conceptualisation of learning. Despite structural and cultural differences, the analysis demonstrates a breadth of shared themes and commitments that cut across institutional and national boundaries, highlighting learning's enduring significance in higher education. I will now address each of the research questions in turn.

RQ 1: What does an analysis of university strategies tell us about the role of modern universities?

The role of modern universities, as articulated in their strategies, is consistently framed in terms of three interrelated missions: education, research, and contribution to society. Universities position themselves as institutions that not only impart knowledge but also generate new insights to address complex societal challenges. While many stress the impact of higher education on preparing students for the world of work, there is a notable emphasis on societal contribution, knowledge dissemination, and global citizenship. Importantly, the findings reveal that, contrary to popular critique, economic or industry-focused agendas are not the predominant framing; instead, strategy documents offer a robust and ambitious vision for the transformative societal impact of universities.

RQ 2: Are underpinning learning theories evident in the published student education strategies of universities?

While the discourse found in university strategy documents frequently aligns with contemporary learning theories, explicit references to theoretical frameworks are

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rare. Common themes emerge, such as active learning, collaboration, future-focused innovation, and the necessity of challenge, but these are usually expressed in practical or aspirational terms rather than grounded in scholarly theory. Only a handful of documents cite specific learning theories or research directly. This implicit rather than explicit use of educational theory points to a gap between progressive rhetoric about learning and robust, evidence-based underpinning. Consequently, there is significant potential for institutions to strengthen their strategies through clearer theoretical alignment.

RQ 3: How do universities position 'learning' in their strategy documents?

Universities vary in how centrally and distinctively they position 'learning' within their strategies. The research identifies a typology spanning four categories: strong, homogeneous, discrete, and weak learning identity. Some universities place learning at the heart of their mission, describing it as a multifaceted, distinctive feature that shapes institutional identity. These institutions articulate clear philosophies about learning environments, outcomes, and experiences that align closely with their stated missions. Others adopt a more generic or peripheral approach, referencing learning in passing or substituting it with terms like "education" or "knowledge." This variation is not explained by size or national context alone, underscoring the importance of deliberate, strategic articulation. Where learning identity is strong and visible, the institution's approach is clearer for students and staff; where it is vague, the strategy risks lacking practical resonance.

RQ 4: What does a comparative analysis reveal in three distinct contexts?

Comparative analysis across Norwegian, South African, and US universities reveals both context-specific distinctions and a pronounced global convergence. Norwegian universities emphasise knowledge as a societal good and assert an explicit societal mission, often in succinct documents. South African strategies conflate 'teaching and learning' reflecting a holistic view shaped by historical imperatives and post-apartheid transformation. In the US, there is greater diversity, with some institutions accentuating selectivity and inclusion primarily in financial terms. Despite these differences, the central themes relating to the

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positioning of learning: active, shared, future-oriented, challenging, and as a process, are remarkably consistent. This suggests a shared, international narrative about the purpose and value of learning in higher education and indicates that the international differences are not about fundamental pedagogical division.

## **8.2 Original contribution**

My thesis therefore makes several original and valuable contributions to the literature on higher education:

### **8.2.1 Empirical Evidence of a Confident Positioning of the Role of the University**

The research provides empirical evidence of a confident, ambitious, and consistent view of the role of modern universities, across different countries and funding regimes. University strategy documents articulate a positive and assured narrative of the institution's purpose and societal contribution, refuting claims of sector disorientation and challenging the dominance of purely neoliberal or economic framings of higher education. This contributes to, and perhaps complicates, debates about purpose, disorientation and neoliberal dominance in higher education. Collini (2018) and others have argued powerfully that rapid sectoral change, marketisation and managerialism have left universities uncertain about their core purpose, with economic rationales crowding out educational and civic values. However, the empirical evidence from my research suggests a more confident and coherent view of the role of universities, at least in the extent of how it is positioned in strategy documents. Across the three national contexts, universities articulate narratives that foreground education, research and societal contribution, rather than exhibiting the disorientation that Collini highlights. In this sense the strategy documents do not reproduce the neoliberal framings present in much debate about modern universities but instead reflect a view more aligned with traditional notions of the role and purpose of universities. My research therefore contributes to contemporary debates about university strategy, such as the research on university strategic plans that highlights their role in expressing institutional legitimacy (Stensaker et al, 2019)

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and the work on mission statements looking at differentiation between universities (Jungblut and Jungblut, 2017).

### **8.2.2 A Novel Typology of Learning Identities**

A significant outcome of this research is the development of a typology of learning identities (strong, homogeneous, discrete, weak). This analytical framework offers a new method for understanding and categorising how universities articulate learning in their strategies and enables comparative work across institutions and national contexts. It provides a tool for both scholarly analysis and institutional self-reflection, revealing how language and positioning signal priorities and underpin institutional ethos.

### **8.2.3 Exposing the "Rhetoric versus Reality" Dynamic**

The research identifies a notable gap between the progressive discourse on learning found in university strategy documents (such as the emphasis on active, collaborative, and student-centred approaches) and the continued prevalence of traditional, transmission-based teaching practices in higher education. By surfacing this divergence, the study encourages critical reflection on strategy implementation and invites universities to examine how their stated values align with operational realities. This aligns with earlier research by Stensaker et al (2019) who assert that the strategies help build legitimacy and Winstone's (2022) proposition that the strategy displays what the institution values.

### **8.2.4 Gap in Explicit Theoretical Foundations**

My analysis reveals the limited presence of explicit references to learning theories in strategy documents, despite a strong implicit alignment. This supports Illeris' (2016) assertions about how learning theory is neglected. It argues that a more deliberate grounding in learning theory could support a more consistent, evidence-based approach to designing and delivering higher education. Embedding theory centrally would better align pedagogic strategy with institutional aims, support faculty development and recruitment, and help safeguard the educational mission of the university against managerialist or

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purely outcome driven models. This supports claims in the literature for stronger theoretical and evidence-based approach to HE and would enable universities to demonstrate a more evidence-based cycle so theory can influence pedagogic strategy in the way Gouthro suggests (2019).

### **8.2.5 Language, Identity and Social Purpose**

By analysing the use and prominence of language related to learning, my study demonstrates how strategic communication shapes learning identities, stakeholder perceptions, and institutional priorities. It highlights the importance of keeping learning, and learning how to learn, at the heart of what universities do, not only for students but for the broader role of universities in developing citizenship and contributing to society. This contributes to debates about the importance of the language used in these type of domains, particularly focused on the way learning is positioned (see for example, Biesta, 2009; Dafermos, 2023 and Morley, 2023).

### **8.2.6 International Insights and Implications**

Through comparative analysis, the thesis shows that while national context shapes document style and strategic emphasis (e.g., Norway's "knowledge" focus, South Africa's fusion of "teaching and learning"), fundamental conceptions of learning remain remarkably consistent. The value of this type of research speaks to Tight's (2021b) call for educational researchers to think and act more globally and internationally. The findings point to an emerging global narrative that places learning, in its rich and diverse forms, at the centre of the university strategy despite structural and cultural differences. This contributes to the studies which have sought to explore international comparisons in university strategies such as, Morphew, Fumasoli, and Stensaker (2018) and Stensaker et al. (2019).

Summary of my argument: Overall, my thesis argues for the value of prioritising learning and its transformative potential within universities. It argues that obscuring the position of 'learning' diminishes the essence of a university, and that reclaiming learning as central to strategic and operational thinking enables universities to fulfil their educational and societal roles in a global context.

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Universities make a significant contribution to individuals, societal advancement, and the resolution of global challenges. The confident positioning of this within the documents was reassuring. Learning and the facilitation of learning are central to this. Research surfacing these points has an important role to play in shaping future discourse about the HE sector.

### **8.3 Implications for research and practice**

#### **8.3.1 Implications for Future Research**

**8.3.1.1 A Typology of Learning Identities:** Future research should build on this contribution by applying and refining the typology in diverse contexts and over time. By expanding empirical work on this typology, future research can enhance the capacity of universities to align strategic communication with pedagogical values, ultimately contributing to clearer, more coherent, and theoretically informed approaches to learning in higher education.

**8.3.1.2 The Value of Comparative Research:** The thesis underscores the value of comparative research in developing a nuanced understanding of higher education systems. Future research should continue to explore the strategic positioning of learning in universities across different cultural contexts and funding models. This could involve:

**In-depth Case Studies:** Conducting detailed case studies of universities in different countries to examine how their strategy documents are translated into actual practices, specifically focusing on the implementation of learning theories.

**Longitudinal Studies:** Tracking changes in university strategies and their impact on teaching and learning over time, to assess the effectiveness of strategic planning in improving educational outcomes and to investigate the change in emphasis over time.

**Further national contexts:** Broadening the scope of this research to review strategy documents beyond these three national contexts.

**A focus on the third mission (in line with Tight's 2021a call for more comparative research in this area):** the focus of my research was 'learning' within the strategy

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documents and whilst the third mission was ubiquitous, further research could probe the positioning in more depth to explore the nature of this contribution.

Language and Identity: Further research should explore the reciprocal relationship between language and social context within universities. This includes investigating how the language used in strategy documents influences:

Learning Identities: How the strategic communication shapes the learning identities of students, faculty, and staff.

Social Relations: Examining the impact of language on social relations and knowledge systems within the university, and investigating the way learning is viewed, prioritised and facilitated.

Theoretical Frameworks: Future research could investigate the impact of explicitly incorporating relevant theoretical frameworks into university strategies. Including qualitative research to explore the experiences of faculty and students in universities with different approaches to incorporating learning theories into their strategies.

### **8.3.2 Implications for Practice**

Applying the typology of learning identities: Universities can use this typology as a reflective diagnostic tool to assess their current strategic narrative around learning. By identifying which learning identity category their institution aligns with, universities can better understand how clearly and distinctively learning is embedded in their mission, and how effectively it is communicated to internal and external stakeholders. This reflection should prompt discussions about whether the institution's expressed learning philosophy authentically represents its educational practices and aspirations, or if it risks being a generic or peripheral statement. Further, the typology can be used to facilitate alignment between strategic intent and operational reality within the university. It can help leadership and academic teams to consider whether their strategy sufficiently supports a coherent and distinctive student learning experience, and whether it communicates clear expectations and values to staff and students. Employing

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this framework periodically could encourage a culture of continuous improvement, ensuring that universities' language and policy genuinely foster transformative, inclusive, and future-focused learning.

**Strategic Alignment:** Universities should strive to ensure that their education strategies accurately reflect their educational ethos and articulate their unique priorities and processes. As such these will respond to some of the key questions posed by Temple (2018, p.170) "What is our core purpose? What makes us different? Where do we want to get to as an institution? What are our primary values?".

**Learning Identities:** Universities should consider how to articulate a strong learning identity in strategy documents to communicate their distinctiveness, philosophy and priorities to both internal and external stakeholders.

**Language Clarity:** Universities should consider the language they use in their strategy documents to ensure that it is accessible to all stakeholders, explicitly stating the intended audience, and possibly creating different versions of strategy documents for different audiences, with tailored language and content.

**Theoretical Underpinnings:** Universities should explicitly incorporate relevant theoretical frameworks into their education strategies to provide a basis for shared understanding and guide the design and delivery of learning. As positioned by Stellenbosch University (2018, p.7) who explain the value of such an underpinning to "adopt relevant theoretical frameworks which will create a basis for shared understanding at SU." (2018, p.7).

## **8.4 Reflecting on my thesis**

### **8.4.1 Reflections**

As the project has been conducted over such a long period of time, there have been many occasions when I have questioned myself and the value of the research. Returning to my original premise though I still believe student education, and by association the way students learn, is the core mission of all universities. Working in the sector in the UK, a focus on learning and the

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facilitation of learning, is not prevalent in the current discourse. Over the time I have been conducting this research, managerialist language and approaches have become even more dominant. “Student success” and KPIs are seemingly accepted without challenge, or consideration of how their prevalence impacts on the role of universities. As a counter to this I have enjoyed exploring the way in which universities position learning and highlighting where the importance of learning, learning theory, and learning identity are valued. Arguing that universities contribution to knowledge is important, but learning and being able to relate to new problems is also important to make this sustainable. The issues facing society today will not be the same as the ones we face in the future and we need people to be able to adapt to new environments and new challenges. I’d therefore argue that we need to return to more traditional notions of a university, to defend the inherent value of learning and to resist the commodification of higher education as a ticket to a job. Recent obsessions in HE, constructive alignment, assessment, satisfaction scores, graduate outcomes may have a role to play but should not be allowed to overshadow the less tangible benefits of what Kant envisaged for the university as the place where reasoning and critical thinking are explored.

In order to defend the university, there needs to be a clear positioning of its purpose to avoid inadvertent shifts in power rather than the unquestioning submission to changing ideals. Academics have not been successful in defending notions in response to increased external influence. Greater managerialism and government control erode traditional ideals. So we need to know what we stand for and we need to articulate this clearly and confidently. I believe the research makes a contribution to this debate. There are arguments against strategy in HE and strategic plans as a pervasive managerial control, however, the scope of this study is not to argue against these documents but in recognising the prevalence across the sector internationally, to make a more pragmatic stance, if these documents exist and have some influence on plans, resources and discourse then they should represent what we consider important, and learning must be central to our notion of what a university stands for, its purpose, its mission and one of its central considerations. To ignore learning in these documents allows it to be overlooked and undervalued. To position a

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strong learning identity shows that learning is valued, the institution understands the complexity and has a distinctive approach which is evidence based.

My biggest struggle has been ensuring I am doing justice to the universities I have studied and I've been very conscious that I have only a partial and limited understanding of each one. This has troubled me as I enjoyed learning about HE in different contexts and exploring their strengths and challenges. The opportunity to critically examine strategy and policy in different settings gave me a way of looking at universities from a different perspective, understanding some of the history and political influence that have shaped our current system. This has developed my understanding of higher education internationally and made me think much more in depth about the implications of different approaches. I was particularly impressed with the Norwegian HE system, where the contribution of universities was highly valued and respected. Interestingly though, I did not always find a strong learning identity in these documents and I returned many times to ensure I was not doing them a disservice in my interpretation. However, my analysis is not intended to be critical but to offer a view from a particular lens.

Related to this, I have reflected on to what extent an outsider researcher can do justice to the complexity of different national systems. I deliberately chose not to include the UK as I felt my experience and pre-existing views would colour my judgment. I was therefore interested to explore how other countries talk about their universities but I recognise that despite the extensive reading about their contexts and the study of strategy documents, I still do not possess an in-depth understanding of these systems. Someone reading my thesis from one of these countries might contradict or add depth to my views. I want therefore to be very careful about not overgeneralising my outcomes. This is what I found within the scope of my study but I do not claim it is a comprehensive account of these three national systems.

Connected to this concern about doing justice to the cases I've studied has been reflections on the size of the sample. Twenty-four documents created a huge amount of data and I spent an enormous amount of time on analysis, generating

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themes and exploring different aspects before being able to make sense of something coherent. This also means I have a significant amount of analysis that I have not explored in depth in the thesis. With hindsight, I perhaps would have focused on a smaller number of universities to explore them in more depth. I felt the use of three contexts was a strength given the paucity of contrasting research in the field of HE but perhaps 4/5 institutions in each national case would have enabled me to develop a more nuanced comparison of the positions of different universities.

Despite this I have learnt a lot about the documentary and thematic analysis through the challenges I encountered. I have done thematic analysis previously on interview and focus group transcripts; I have also seen research using this technique in a variety of ways. It is far more complex and iterative in nature than is sometimes implied. I was initially considering template analysis (generating a template of learning theories) as a more structured way of organising the data, but through discussions with my supervisor I began to understand the way this might shape the findings through a deductive methodology. A more inductive approach presented a challenge of the messiness of my data in relation to my research questions. The strategy documents were not written for the purpose of my research in the way my previous thematic analysis had used primary data. The use of the three guiding questions was a way of focusing on the aspects of the strategy documents that were relevant for my study without predetermining what I would find. On reflection, I feel this approach helped me replicate the use of open questions, which I believe is a strength of the approach I adopted to documentary analysis.

#### **8.4.2 Looking ahead**

As the thesis is a journey rather than just an outcome I have already been drawing on my learning within my role at work. In my current position I have responsibility for the Student Education strategy of my department. This has to align with the university strategy and reflect the particular purpose of my widening participation brief. I've led development of the strategy through extensive consultation but now plan to articulate a strong learning identity in the strategy

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document to communicate our distinctiveness, philosophy and priorities to both internal and external stakeholders. There are some references to pedagogic positioning in the university wide strategy but I want to go further in the department strategy with incorporating relevant theoretical frameworks to guide design and delivery of our curriculum and align staff development with these approaches.

At a university level I am involved in the development of more innovative and experiential learning opportunities across the curriculum and I will be drawing on my conclusions about the value of clarity, transparency and scholarly informed approaches as we develop strategy and practice in this area.

Finally, regarding future research practice I'll need some time to reflect on whether I'd like to pursue further dissemination of my thesis outcomes and also to consider whether to return to some of the analysis that was beyond the scope of the thesis. Beyond the particular focus of the thesis, I will be applying the lessons I've learnt in the research process to other research projects related to my work and using the expertise I've developed in research methods teaching.

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## **Appendix A: Defining learning and an overview of learning theories**

### **Defining Learning**

*“an act of sense making or comprehension” (Biesta, 2015, p.230).*

Firstly, a note on what is meant by learning, because before we can talk about theories of learning, the concept itself requires definition, whilst acknowledging that learning is complex and there is a lack of consensus. De Houwer et al. (2013) note surprise that given the centrality of “learning” in research studies, most researchers aren’t clear what they purport by the term and Barron et al. (2015) cite disparity in definition across disciplines. Biesta (2015) suggests teaching and learning are so often conjoined that they become almost a single word.

Definitions are inextricably linked to the beliefs about learning and therefore different perspectives will come from diverse epistemological positions; as such the many definitions of learning, the emphasis and focus will reflect the theoretical position of the professional, theorist or researcher. Thus the definition cannot be isolated from the theory, however, in a study on the importance of language it seems necessary to at least set out some definitions to foreground the discussion of learning theory.

In debating a philosophy of education, Dewey describes traditional school structures where learning means “acquisition of what already is incorporated in books and in the heads of elders.”(Dewey, 1986, p. 243). Beyond ideas of acquisition, Gagne (1974, p.154) proposes learning happens when “A change in performance has occurred and is retained over a period of time. The inference is that some internal capability of the individual learner has been altered by the instruction which was given, and it is this change in capability that is called learning”. Similarly, Merriam and Caffarella (1999, p. 261) describe a constructivist perspective as one which defines learning in relation to experience: “Basically, a constructivist stance maintains that learning is a process of constructing meaning; it is how people make sense of their experience”.

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Acknowledging the differences within and across disciplines Barron et al contend that “most contemporary theoretical considerations of learning view it as a structured updating of system properties based on processing of new information” (Barron et al., 2015, p.405). In a much broader assertion, Visser (2001, p.12) talks about undefining learning as a way of addressing the limitations of previous definitions, she proposes “Human learning is the disposition of human beings, and of the social entities to which they pertain, to engage in continuous dialogue with the human, social, biological and physical environment, so as to generate intelligent behavior to interact constructively with change.”

Illeris (2015) having extensively studied theories of learning, refers to a number of factors which illuminate the process of how someone learns. He talks about cumulative learning, adding information to existing knowledge, and transformative learning which changes previously held beliefs and understanding, and distortions and resistance to learning. Recognising the value of metacognition, an important dimension of learning within HE is perhaps best articulated by (Rogers, 1969, n.p.) “The most socially useful learning in the modern world is the learning of the process of learning, a continuing openness to experience and incorporation into oneself of the process of change.”

Context will also have an influence. Scott (2021) suggests learning is a polysemic concept and its meaning can only be understood in relation to the context within which it is used. He distinguishes learning as a process which requires an interaction with something else. Gouthro (2019, p.70) uses the following example: “In a neoliberal environment where you are designing a program in which outcomes are predetermined and learning must be measured to demonstrate “success,” a course will have a different design than a community-based learning program that is focused on learner engagement and citizen involvement.” A context where technology offers new ways of doing things also requires a shift in approach. The Covid 19 pandemic forced universities to embrace online methods at speed when the process of adopting new methods of online, hybrid and flipped delivery had previously been on the margins. The understanding of different pedagogic approaches was inconsistent, and some aspects of online delivery were a replica of face to face approaches without an

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understanding of the limitations. Some of the changes that were adopted have been retained and interest is garnering in working towards more flexibility and choice in how students access learning. However, traditional methods still dominate universities focusing more on transmission modes rather than teaching designed with an evidence-based approach.

### **Behaviourism, Cognitivism and Constructivism**

Beginning with Behaviourism, this focuses on observable behaviours in response to stimuli and the role of reinforcement in shaping learning outcomes. One of the foundations of behaviourism was Pavlov's classical conditioning experiments using dogs and testing their saliva responses in response to stimuli. This would raise ethical concerns today, but his experiments were considered revolutionary when this work began in the 1890s. It is still seen as influential today in studies of behaviour and learning, Lefrançois (2020) suggests this impact should not be underestimated just because the studies don't address higher mental processing but should be recognised for the practical applications and as an underpinning for subsequent research. Another seminal work in this category was Skinner's theory of operant or instrumental conditioning, which proposes that behaviour that is reinforced is likely to be repeated. In the 1930s he used experiments with rats and pigeons to test the response to reward and punishment, but later applied the theory to humans (Skinner, 1963). Bélanger (2011, p.19) cites Skinner (1953) "All we need to know to describe and explain behavior", wrote B.F. Skinner (1953), "is this: actions followed by good outcomes are likely to re-cur, and actions followed by bad outcomes are less likely to recur". Skinner's work has had significant influence including in psychology, education, neuroscience, and philosophy (Schlinger, 2022). A key difference between classical and operant conditioning is that Pavlov saw the response as reflexive whereas Skinner suggested the behaviour was voluntary. Learning as a behavioural response to environmental stimuli would likely be seen in the strategy documents as metrics and targets related to outputs or learning gain.

Turning next to Cognitivism, which derives from Gestalt theory and investigates the cognitive processes underpinning learning to consider how information is

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acquired, processed and retained. This introduces processes such as problem solving, memory and decision making as part of the learning process. Köhler (1925) began exploring insight learning by watching chimpanzees solve problems which he claimed showed cognitive and not just behavioural influences on learning. Although there is some criticism of the extent these studies on chimpanzees can be applied to humans, Köhler's ideas can be seen to align with the value of problem based learning and inquiry based learning in HE today, which could be referenced in the strategy documents as particular approaches to the design of learning experiences. .

The constructivist field was heavily influenced by Piaget (1964), looking at the connection between the environment and the cognitive process. "Basically, a constructivist stance maintains that learning is a process of constructing meaning; it is how people make sense of their experience" (Merriam and Caffarella, 1999, p.261, cited in Bélanger, 2011 p.28). Piaget proposed that children progress through four stages of cognitive development. He claimed that children actively engage with the world around them to develop their knowledge. His initial theory was based on observation of his own children, but his theory was tested in different countries where they found children progressed through the same stages but the age of moving from one stage to the next differed. Piaget said this proved it was not just about maturation but that experience has a role to play. Piaget distinguishes development and learning, so learning is only possible when a stage of development has been reached and therefore assimilation is key to learning "I shall define assimilation as the integration of any sort of reality into a structure, and it is this assimilation which seems to me to be fundamental in learning" and further "Learning is possible only when there is active assimilation."(Piaget, 1964, p.185). Another influential figure in constructivism has been Vygotsky who has helped shape modern educational practices and thinking by highlighting the importance of social learning and cultural context in cognitive development. Vygotsky criticised Piaget's position "Because this approach is based on the premise that learning trails behind development, that development always outruns learning, it precludes the notion that learning may play a role in the course of the development or maturation of those functions activated in the course of learning." (Vygotsky, 1978, p.80). Instead, Vygotsky

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proposes that “Learning and development are interrelated from the child’s very first day of life” (Vygotsky, 1978, p.84). Vygotsky focused on the social origins of cognition and the role of language in cognitive development. Vygotsky's concept of the Zone of Proximal Development has been particularly influential, highlighting the importance of scaffolding and guided participation in learning. “The idea is to confront the learner with a learning situation or problem that is hard and complex enough to be challenging but not too difficult and hence discouraging. The purpose is to find a zone of development within which the learner can receive support and, as a result, achieve something that he or she would have been incapable of achieving all by themselves.” (Bélanger, 2011, p.29). An emphasis on the way knowledge is actively constructed through experience could be represented in the strategy documents as an emphasis on experiential or active learning or perhaps approaches to critical enquiry.

Whilst social learning theory also expanded the cognitivist approach, the emphasis was more on the social environment rather than the internal development; also, whilst Piaget’s work has been influential in early education the social learning approach has also addressed learning processes for adults. Bandura focused on the interdependence of environmental and personal influences on learning (Bélanger, 2011). In his social learning theory Bandura (1977) focused on how cognitive and information-processing can influence social behaviour so people can learn by observing, imitating, and modelling the way others behave. This theory builds on behaviourist theories of reinforcement but also emphasises the cognitive processes in learning. Bandura’s theory is sometimes categorised as a socio-cognitivist theory (Bélanger, 2011). His famous Bobo doll experiment showed how children learn from watching adults and his concept of self-efficacy has been significant in understanding differences in learning responses. This might be represented in strategy with modelling and good practice approaches to learning.

The table below shows an overview of the learning theories presented as background to the use of learning theory as a lens to view the strategy documents.

<u>Theory</u>	<u>Date</u>	<u>Theorist</u>	<u>Brief Description</u>
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<u>Classical Conditioning</u>	<u>1890s</u>	<u>Pavlov</u>	<u>Pavlov's experiments on dogs' saliva responses to stimuli, focusing on reflexive behaviors</u>
<u>Cognitivism</u>	<u>1920s</u>	<u>Köhler</u>	<u>Köhler's work on insight learning, emphasizing cognitive processes in problem-solving</u>
<u>Operant Conditioning</u>	<u>1930s</u>	<u>Skinner</u>	<u>Skinner's theory proposing that reinforced behavior is likely to be repeated</u>
<u>Constructivist Theory of Development</u>	<u>1960s</u>	<u>Piaget</u>	<u>Piaget's stages of cognitive development in children, emphasizing active engagement with the environment</u>
<u>Sociocultural Theory</u>	<u>1970s</u>	<u>Vygotsky</u>	<u>Vygotsky's focus on social learning, cultural context, and the Zone of Proximal Development</u>
<u>Social Learning Theory</u>	<u>1970s</u>	<u>Bandura</u>	<u>Bandura's theory on learning through observation, imitation, and modeling of others' behaviour</u>
<u>Andragogy</u>	<u>1970s</u>	<u>Knowles</u>	<u>Knowles' theory of adult learning, emphasizing self-direction and learner characteristics</u>
<u>Self-Directed Learning</u>	<u>1960s-1970s</u>	<u>Tough</u>	<u>Tough's concept focusing on learner control and initiative in the learning process</u>
<u>Transformative Learning Theory</u>	<u>Late 1970s</u>	<u>Mezirow</u>	<u>Mezirow's theory on changing perspectives through critical reflection and discourse</u>
<u>Collaborative Learning</u>	<u>1960s-1970s</u>	<u>Bruffee</u>	<u>Bruffee's approach emphasizing small group learning and social context in higher education</u>
<u>Cooperative Learning</u>	<u>1960s-1970s</u>	<u>Johnson and Johnson</u>	<u>Johnson and Johnson's structured approach focusing on interdependence and accountability</u>
<u>Situated Learning</u>	<u>1980s</u>	<u>Lave and Wenger</u>	<u>Lave and Wenger's theory emphasising learning within social, cultural, and historical contexts and advancing the theory of Communities of Practice</u>
<u>Experiential Learning Theory</u>	<u>1984</u>	<u>Kolb</u>	<u>Kolb's model of learning through experience, reflection, and application</u>

<u>Informal and incidental learning</u>	<u>1990</u>	<u>Marsick and Watkins</u>	<u>Learning in less structured or formal ways, particularly focused on workplace learning</u>
<u>The field of learning</u>	<u>1999</u>	<u>Illeris</u>	<u>Model showing the fundamental processes of learning</u>
<u>Heutagogy</u>	<u>2013</u>	<u>Hase and Kenyon</u>	<u>Hase and Kenyon build on ideas of andragogy to develop a concept of heutagogy</u>

## Appendix B: information about the universities in the sample

Appendix B shows information about the universities in the sample, including: THE World University Ranking; number of students; student staff ration; teaching score on THE; overall score on THE.

University	THE World University Ranking	No of FTE Students	No of Students per staff	Teaching score	Overall score
University of Oslo	=127	20737	12.2	39.5	59.4
University of Bergen	201-250	14297	12.4	28.3	50.6-54.2
Norwegian University of Science and Technology	401-500	36050	15.5	27.2	39.8-43.5
University of Tromso	Not listed				
Norwegian University of Life Sciences	601-800	5860	6.8	26.3	30.2-36.3
UiT The Arctic University of Norway	351-400	14276	10.4	23	43.6-45.5
Western Norway University of Applied Sciences	Not listed				
University of South-Eastern Norway	Not listed				
University of Stavanger	Not listed				
Oslo Metropolitan University	Not listed				
Stanford University	2	16223	7.4	91.3	94.9
Harvard University	3	21261	9.3	94.4	94.8
California Institute of Technology	4	2238	6.3	92.5	94.5
Massachusetts Institute of Technology	5	11276	8.4	90.7	94.4
University of California, Berkeley	7	39918	19.8	85.8	92.2
Yale University	8	12910	6	91.9	91.6
Princeton University	9	8091	8	88.8	91.5
The University of Chicago	10	14292	5.9	88.9	90.3
John Hopkins university	12	16432	4.4	81.6	89.2
University of Pennsylvania	13	20771	6.4	85.4	88.9

University	US News Best Global Universities Rankings	Enrollment			Global score
University of Oslo	90	n/a			72
University of Bergen	183	14,327			65.2
Norwegian University of Science and Technology	266	37,132			60.7
University of Tromsø	445	n/a			54.3
Norwegian University of Life Sciences	=675	n/a			47.4
UiT The Arctic University of Norway					
Western Norway University of Applied Sciences	=1053	n/a			38.1
University of South-Eastern Norway	=1061	n/a			37.9
University of Stavanger	=1068	n/a			37.7
Oslo Metropolitan University	=1233	n/a			34.0
Stanford University	3	16319			95.6
Harvard University	1	21575			100
California Institute of Technology	9	2233			85.5
Massachusetts Institute of Technology	2	11459			97.5
University of California, Berkeley	4	40306			89.4
Columbia University	6	22801			86.7
University of Washington	7	47606			86.5
Yale University	12	13317			85.2
Princeton University	16	n/a			84.2
The University of Chicago	15	14895			84.5
John Hopkins university	9	16552			85.5
University of Pennsylvania	13	21211			84.8

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University California Francisco	of - San	11	n/a			85.4
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## Appendix C: search strategy for research on university strategy

As the research was done over a number of years a final review was conducted to ensure an up to date understanding of the research relating to university strategy documents.

My argument, that observing ever increasing managerialist approaches within universities, media stories of the undermining of the role and independence of universities, narratives about the value for money etc we need to reclaim the discourse of universities, their purpose and their value (not value for money). It is therefore important to challenge the language of strategy documents and their areas of focus to ask important questions about what we want our universities to fulfil, how we differentiate different philosophies and what evidence base underpins their approach.

Cresswell "...identifying terms to typically use in your literature search; locating literature; reading and checking the relevance of the literature; organizing the literature you have selected; and writing a literature review". (2002, p 86).

Scopus 26/05/2025

Article title, abstract, keywords

1. "higher education" OR universit\*

AND "strategy document" OR "strategic plan" OR "policy document" OR "institutional strategy"

3,481 results found, too broad covering too many loosely related results using 'strategy' as an approach rather than a strategic document.

2. "higher education"

AND "strategy document" OR "strategic plan"

647 results

3. "higher education" OR universit\*

AND "strategy document" OR "strategic plan"

1,814 results

Too broad not addressing university strategy

4. "higher education" OR universit\*

AND "strategy document" OR "strategic plan"

AND "learning and teaching" OR "teaching and learning" OR "education strategy"

73 results

Reduce to social science (to exclude things like computer science)

54 results

Covid papers about impact on T&L

More recent papers some on AI and sustainability

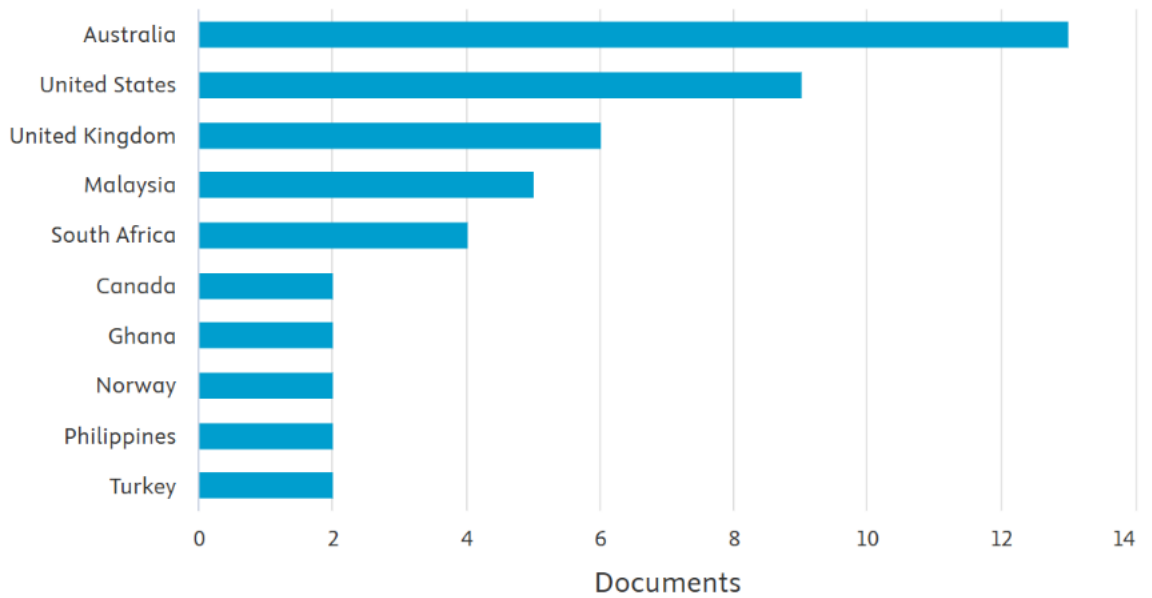
Not addressing university wide strategy documents. A lot on technology, specific studies such as library (x3), open educational resources, peer mentoring, e-learning, ipads, teaching support staff, learning management system

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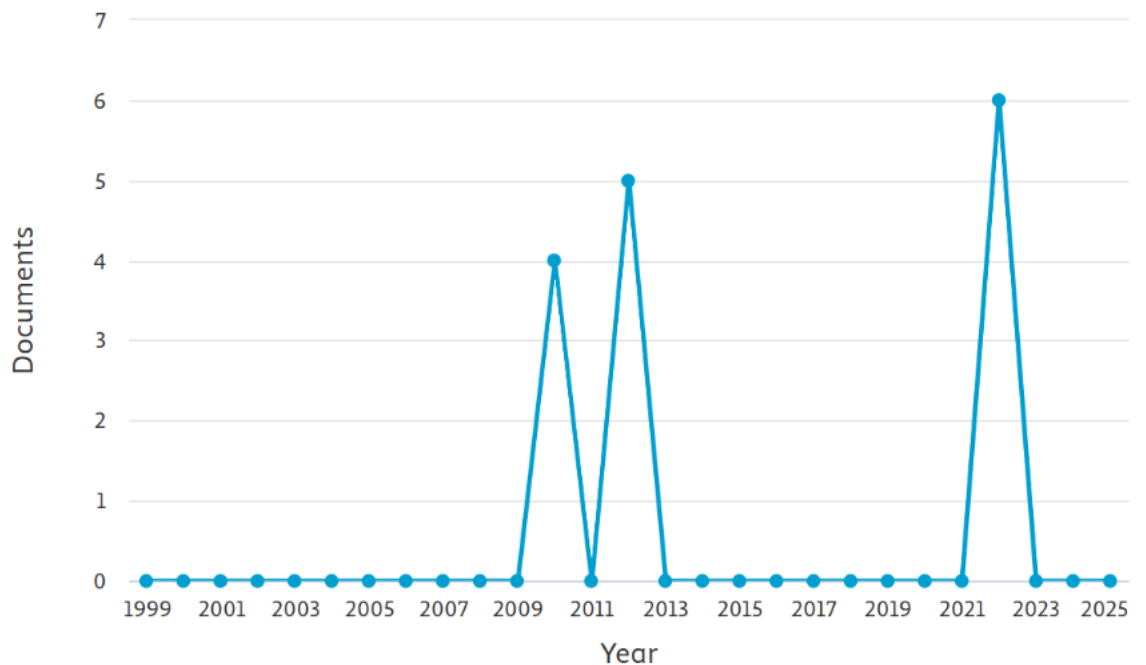
## Documents by country or territory

Compare the document counts for up to 15 countries/territories.



Scopus search 08062025 showing documents by country

## Documents by year



Scopus search 08062025 showing documents by year

Doesn't include Winstone or Stensaker or Fumasoli or Morphey or Jungblut (all relevant articles which have come up in other searches) which suggests this search process is not comprehensive enough. Removing social science filter did not change this.

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5. "higher education"  
AND "strategy document" OR "strategic plan"  
AND "learning and teaching" OR "teaching and learning" OR "education strategy"

Higher Education as the context for research  
Strategy document or strategic plan as the focus  
Learning and teaching as the subject of the study (to reduce the number of documents focusing on other aspects of strategy such as finance)  
"education strategy" rather than "education" as the latter appears in "higher education" and therefore does not refine the search but "education strategy" needs to be included as a synonym for teaching and learning strategy.

37 results

Refined by subject area to social sciences

30 results

30 results exported to excel "phd scopus search for strategy documents"

Drop down column V added to respond yes/no to the question: does the abstract include a focus on university strategy documents? Read title and abstract and respond yes/no. Where it was not clear from the abstract whether the paper was relevant then the full paper was reviewed.

Where papers are excluded the reason for exclusion is recorded in column W

Where papers are included the relevance to my research is recorded in column X

12 were assessed as relevant to my research and 18 not relevant.

The 12 studies selected as relevant for the literature review were assessed to have direct relevance to the research focus on university level strategy or strategic planning, in relation to teaching and learning. The selection provides an analysis of official strategy documents from universities across various contexts, including the UK, Australia, South Africa, Turkey, and the Republic of Ireland. The range of topics is quite broad, including how institutions approach interdisciplinarity, blended learning, partnerships, and technology adoption within their strategic frameworks. Other studies specifically discuss the processes involved in developing learning and teaching strategic plans, while one examines the use of ecological terminology and another investigates the intersections between technology and pedagogy as reflected in institutional documents. By concentrating on the content, development, and implementation of university strategy documents, these studies appear collectively to contribute potential empirical and conceptual perspectives that align closely with the aims of the literature review, however, this assessment is made on the detail in the abstracts at this stage and a more detailed examination of the papers followed (see further details below).

The studies excluded as not relevant for the literature review were because of a lack of alignment with my research focus on university level strategy documents, such as those addressing language policy and digital learning. Some studies analysed external reports rather than institutional strategy documents, while others, such as one conference paper, lacked sufficient methodological detail, making it unclear how the author formed their views on e-learning. Additional exclusions were made for studies that concentrated on perceptions of learning conditions, evaluations of dashboard tools or specific initiatives, and analyses of learning management systems or technology provision projects, as these did not address overarching strategic approaches. Research focusing on interpretations of interdisciplinary learning and teaching, communities of practice around the scholarship of teaching and learning (SoTL), federal or national policies, or changes during the pandemic were also excluded, as their primary emphasis was not on university strategy documents. Similarly, studies that explored technology from a theoretical perspective, focused on real estate or information literacy strategies, or a theoretical chapter without direct relevance to university strategy were omitted to maintain a clear and consistent scope for the review.

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The 12 papers selected as relevant were then read in full and their bibliographies used to identify other potentially relevant papers.

## Appendix D: descriptive details of the strategy documents

This appendix contains examples from the early analysis stages of the project.

Name	Size	No of student per	%international stud	% female
Brown	9851	10.6	20	n/a
Columbia	21608	4.6	35	n/a
Princeton	7753	7.5	23	47
Berkeley	40306	18.9	23	51
Duke	15785	4.2	22	52
John Hopk	16552	4.3	28	52
UCLA	42054	10	17	55
Northwest	18735	13	19	50
Bergen	14327	12.3	13	59
NUS&T	35400	14.9	8	49
Oslo	21413	13.2	19	66
UiA	14215	9.2	n/a	59
LifeScience	6185	7	19	56
Stavenger	11560	12.1	12	60
Nord	11000	8.5	n/a	n/a
South-East	18 275	9.9	n/a	n/a
Cape Town	21757	13.3	16	54
Stennbosc	24733	26.1	8	56
Wit	26 872	24.2	9	55

University	L&T strategy or extract from unj strategy/ location of strategy	Background information	Date of strategy document	Size of University	website	Info	Brief summary
University of Oslo	<a href="#">About UiO - University of Oslo</a> <a href="#">Strategy and plans - University of Oslo (uio.no)</a> <a href="#">Strategy 2030 - University of Oslo (uio.no)</a> <a href="#">strategy-2030.pdf (uio.no)</a>	<a href="https://www.uio.no/english/about/facts/">https://www.uio.no/english/about/facts/</a> UiO is Norway's oldest institution for research and higher education, with 28,000 students and 7,000 employees. UiO celebrated its 200th anniversary in 2011.	UiO's overall strategy until 2030 was adopted by the University Board on 14.02.2020.	Student s26,450 Staff 6,685 Faculty s8	<a href="#">Home - University of Oslo (uio.no)</a>	<a href="#">Where can I study / Study in Norway / Home - Study in Norway</a> Founded in 1811, the University of Oslo is Norway's largest and leading institution of higher education and research. Today, the University of Oslo has approximately 30,000 students and 4,600 employees, divided between the following eight	This is a 7 page document. The strapline for the strategy is "Knowledge – responsibility – commitment For a sustainable world". This is followed by 4 bullet points about what the university setting our what the university 'shall' do. These are later described as "interdependent ambitions" (p2). The first of these is about research, the second about educating students. Interestingly, the social mission places these the

## Bergen (16 pages)

The Bergen strategy is titled “KNOWLEDGE THAT SHAPES SOCIETY” and dated 2019–2022. It begins by emphasizing that there is a ‘common thread’ running through the diverse activities and history of Bergen. This declaration of congruity is also emphasized in the assertion “We promote a common academic identity through diverse collaborative forms within our various academic fields”. p.8

Highlighting some of its key achievements, it then proclaims: “We aim to build on these traditions: to continue to innovate; to transcend the boundaries between disciplines; to advance the frontiers of knowledge and to progress on the path toward a sustainable future.” p3. It then describes this common thread by articulating the strategy under the following headings (p.2):

“WE EXPLORE

WE EDUCATE

WE DEVELOP

WE CHALLENGE

KNOWLEDGE THAT SHAPES SOCIETY”

There is a strong emphasis on staff and students working together, active participation in research, impact on society (incl “Our researchers and students will contribute insight and disseminate knowledge in the public arena.” P.10), being a stakeholder in research and educational policy, an emphasis on regional collaboration but also international relationships, transdisciplinary (e.g. ‘transcend traditional discipline and faculty Boundaries’ p.6). The document positions current

University	What students will receive, what the university will offer/provide	Learning environments students will experience	Relationships	Student recruitment	Outputs
University of Bergen	“We offer students an outstanding research-based education from bachelor degree to doctorate. Knowledge, critical reflection and personal development are hallmarks of our educational programmes.” Bergen p.6	“UiB will offer students high quality, innovative learning environments grounded in excellent research and teaching expertise and employing methodologies, infrastructure and tools that support future-oriented forms of learning. The following approaches will be prioritised during the strategy period: • Developing learning arenas that promote student-active forms of learning.	“Academic staff and students at the University of Bergen work together to research important topics spanning the origins of the universe, human history and Earth’s future.” Bergen P.4	“We will continue to recruit high quality researchers and students and aim to be a locus of internationally renowned research, education and knowledge dissemination.” Bergen p.4 and “Developing initiatives for more targeted student recruitment.” P.22	“Together, our research students will generate n insights to address the c that face society today.”

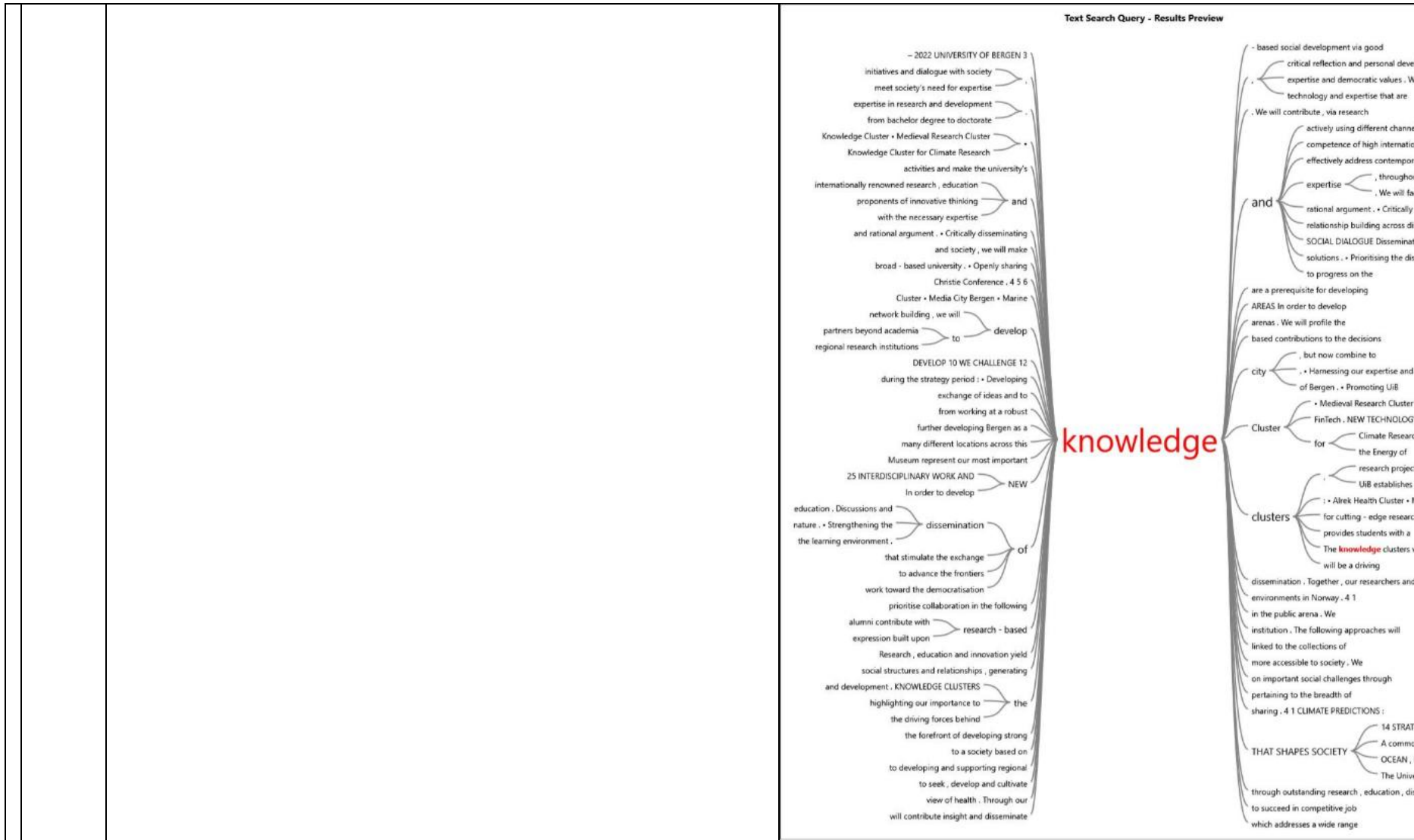
## Appendix E: an extract of the code book

Aggregate	Classification	Coverage	Number Of Coding References	Reference Number	Coded By Initials	Modified On
Files\john hopkins strategic plan						
No		0.0115	8			
				1	V	02/08/2022 13:00
				Johns Hopkins has long been home to profound acts of collaboration.		
				2	V	02/08/2022 13:00
				To be sure, robust collaboration must be built on strong and vibrant disciplines, which are marked by shared norms and methodologies and fuel rigorous inquiry.		
				3	V	13/06/2022 08:17
				record of collaboration in every corner of our policies and practices, from faculty appointments to tenure and promotions processes, from joint degrees to doctoral education, from research costs to teaching and laboratory spaces, from schedules and the academic calendar to the harnessing of technology to bridge our campuses and create connections among scholars that might otherwise never have formed.		
				4	V	13/06/2022 08:19
				collaborative initiatives that will knit together the university's disciplines and divisions and build from the core academic objectives of our schools.		
				5	V	01/08/2022 18:32
				we will build the strongest possible connections between our students and our faculty and staff in order to provide a peerless educational experience		
				6	V	13/06/2022 08:30
				And we will fortify existing connections, and build new connections, among our undergraduates and our graduate and professional schools in		

# Appendix F: word frequency analysis

University 1 Bergen	Most common words (including stemmed words, excluding university and its name)	Learning																																																		
	<table border="1"> <thead> <tr> <th>Word</th> <th>Length</th> <th>Count</th> <th>Weighted Percentage (%)</th> <th>Similar Words</th> </tr> </thead> <tbody> <tr> <td>research</td> <td>8</td> <td>91</td> <td>3.28</td> <td>research, researchers, researches</td> </tr> <tr> <td>development</td> <td>11</td> <td>73</td> <td>2.63</td> <td>develop, developed, developing, development</td> </tr> <tr> <td>uib</td> <td>3</td> <td>51</td> <td>1.84</td> <td>uib</td> </tr> <tr> <td>knowledge</td> <td>9</td> <td>49</td> <td>1.77</td> <td>knowledge</td> </tr> <tr> <td>university</td> <td>10</td> <td>42</td> <td>1.52</td> <td>universe, university</td> </tr> <tr> <td>students</td> <td>8</td> <td>40</td> <td>1.44</td> <td>student, students, students'</td> </tr> <tr> <td>academic</td> <td>8</td> <td>33</td> <td>1.19</td> <td>academic</td> </tr> <tr> <td>education</td> <td>9</td> <td>32</td> <td>1.15</td> <td>educate, educates, education, educational</td> </tr> <tr> <td>society</td> <td>7</td> <td>30</td> <td>1.08</td> <td>societies, society</td> </tr> </tbody> </table>	Word	Length	Count	Weighted Percentage (%)	Similar Words	research	8	91	3.28	research, researchers, researches	development	11	73	2.63	develop, developed, developing, development	uib	3	51	1.84	uib	knowledge	9	49	1.77	knowledge	university	10	42	1.52	universe, university	students	8	40	1.44	student, students, students'	academic	8	33	1.19	academic	education	9	32	1.15	educate, educates, education, educational	society	7	30	1.08	societies, society	<p>16 references for learning</p> <p>5 for teaching</p> <p>32 references to educate, education</p>
Word	Length	Count	Weighted Percentage (%)	Similar Words																																																
research	8	91	3.28	research, researchers, researches																																																
development	11	73	2.63	develop, developed, developing, development																																																
uib	3	51	1.84	uib																																																
knowledge	9	49	1.77	knowledge																																																
university	10	42	1.52	universe, university																																																
students	8	40	1.44	student, students, students'																																																
academic	8	33	1.19	academic																																																
education	9	32	1.15	educate, educates, education, educational																																																
society	7	30	1.08	societies, society																																																

		<p style="text-align: center;"><b>Text Search Query - Results Preview</b></p> <p style="text-align: center;"><b>49 References to knowledge</b></p>
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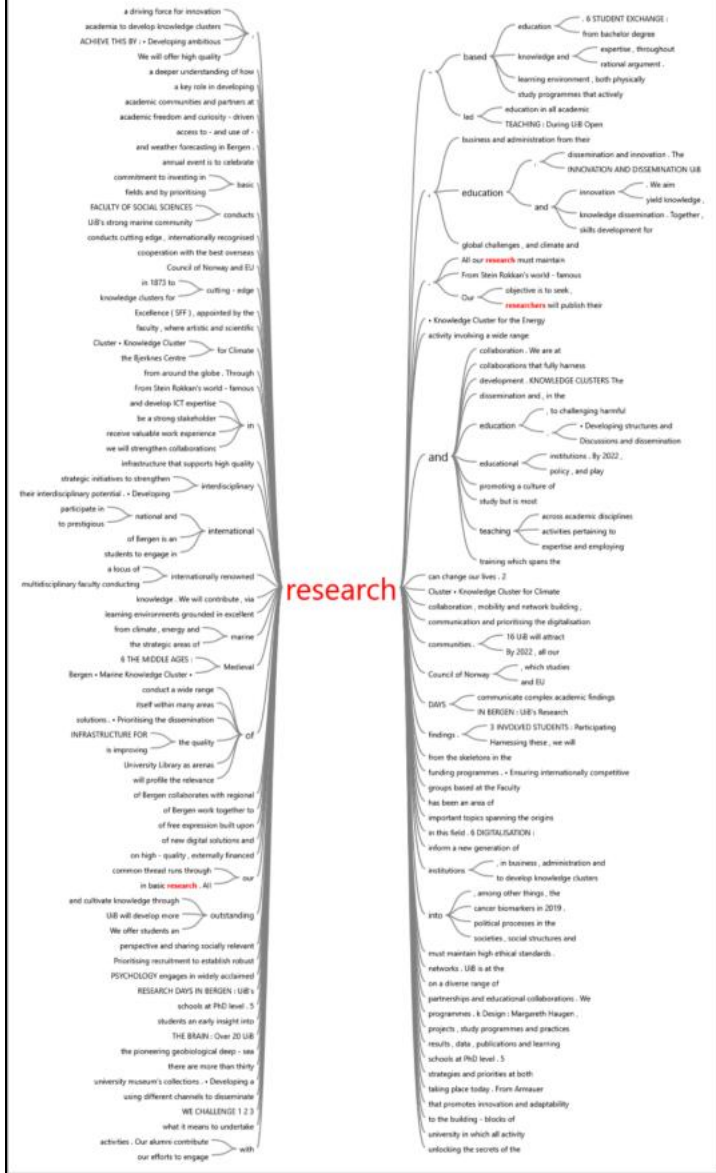


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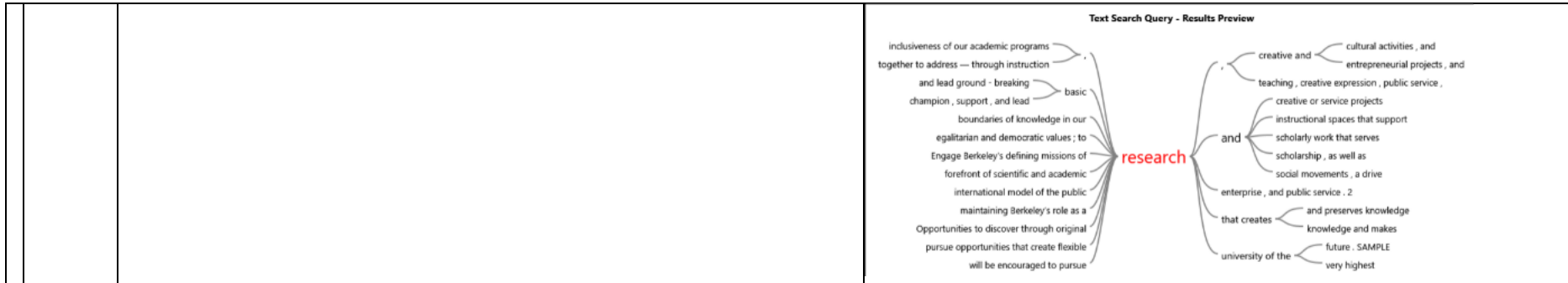
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		91 references to research
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Text Search Query - Results Preview



2 Berkeley	Word	Length	Count	Weighted Percentage (%) ▾	Similar Words	2 references to learning, one to teaching
	berkeley	8	57	4.55	berkeley	
	students	8	37	2.95	student, students, students'	
	campus	6	18	1.44	campus	
	create	6	18	1.44	create, creates	3 references to educate, education
	support	7	16	1.28	support, supporters	
	engage	6	14	1.12	engage, engaged, engagement	
	new	3	14	1.12	new	
staff	5	14	1.12	staff		
<p style="text-align: center;"><b>Text Search Query - Results Preview</b></p> <p>expand and deepen , reflecting that the future of public higher <b>education</b> . F Berkeley's Signature Initiatives will is increasingly a lifelong experience .</p>						9 References to knowledge
<p style="text-align: center;"><b>Text Search Query - Results Preview</b></p>						13 references to research



## Appendix G: characteristics of the universities

Analysis from RQ 1 and 3 and characteristics of the universities were produced in a table to summarise the data and surface any patterns. Appendix G. Analysis from RQ 1, 2 and 3 and characteristics of the universities were produced in a table to summarise the data and surface any patterns.

University	Role of uni	elite v inclusive	competitiveness	distinctive or generic	peripheral or central	size of document	Most freq	s
University of the Witwatersrand (Wits)	both	elite support	with	generic intellectual elitism	T&L	large	research	e
Stellenbosch university	both	inclusive		distinctive collaborative	central	large	learning	r
UCLA	both	inclusive		distinctive active	central	large	teaching	e
University of Science and Technology	society	inclusive		distinctive innovative and scientific	central	large	research	k
University of Johannesburg	society	inclusive		distinctive Fourth Industrial Revolution	T&L	large	learning	r
University of South Africa UNISA	society	inclusive		distinctive digital	central	large	research	le
Northwestern University	society	inclusive		distinctive experiential	central	large	research	le
Duke University	society	inclusive		distinctive learning communities	central	large	research	le
Princeton University	both	elite support	with bigger slice	generic	peripheral	large	research	e
Johns Hopkins University	society	elite support	with bigger slice	generic	peripheral	large	research	e
North-West University	both	inclusive		generic	central	large	learning	r
University of Pretoria	both	inclusive		distinctive inquiry led	T&L	medium	research	k

University of Cape Town	both	elite		generic		T&L	medium	research	e
University of Bergen	society	elite		generic		central	medium	research	k
Brown University		elite	with						
	both	support		generic		central	medium	education	r
University of South Eastern Norway	both	inclusive		generic		peripheral	medium	knowledge	e
Columbia College		elite	with						
	individual	support		distinctive	interdisciplinary	peripheral	small	education	r
Nord University	both	inclusive		distinctive	research	peripheral	small	education	r
Norwegian University of Life Sciences	both	inclusive		distinctive	digital and lifelong	central	small	research	e
Tshwane University of Technology	both	inclusive		distinctive	digital	T&L	small	research	le
University of Oslo	both	inclusive	bigger slice	generic		peripheral	small	research	k
University of Agder	both	inclusive	not competitive	generic		peripheral	small	research	k
University of California, Berkeley	both	inclusive	larger cake	distinctive		peripheral	small	research	k
University of Stavanger	society	inclusive	bigger slice	generic	learning for life	peripheral	small	research	k

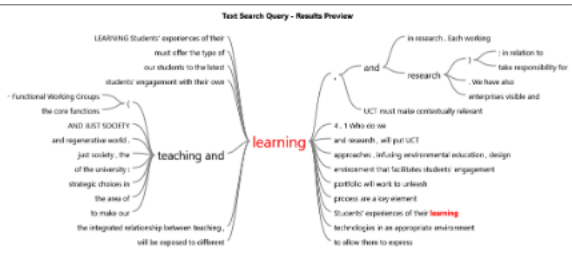
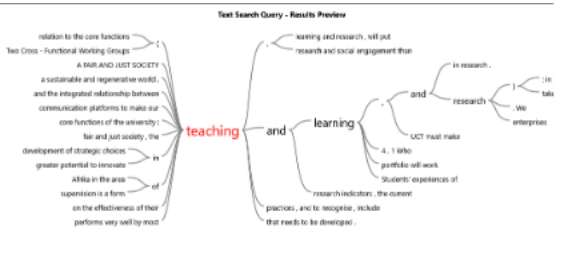
## Appendix H: codes emerging from the analysis

Name	Description
What does the strategy tell us about the qualities features and characteristics of learning	
active learning	This captures comments about an active learning process, including engagement and participation. It invokes a learner centred approach where the student is an active participant in the learning process rather than a passive recipient of knowledge.
applied	This captures an emphasis on work based, project, placement, employability related text. The main focus is experiential learning and opportunities to engage with real world scenarios.
collaborative and partnership working	This denotes an emphasis on a collaborative learning environment, with a culture of collegiality and partnerships within and external to the university. Collaboration may be between different groups of students (eg undergrad and postgrad), between staff and students, across disciplines, with academia, research institutions, society and industry.
community	There was considerable overlap between the collaborative and community nodes. Where the coded text relates to working with others explicitly then it was recoded as collaborative. Some references were also moved to diversity. The references remaining here mention physical spaces to explicit references to learning communities.
critical	This code focuses on critical intellectual enquiry, critical thinking, critical reflection, critical analysis and challenging established ideas.
digital	This is mainly concerned with how learning technologies could be used to enhance learning or provide wider access.
extra curricular	This captures references to learning outside of the formal curriculum.
flexible	This refers to flexible delivery, which could be through modes of learning, approaches, timing or blended learning.
independent	A focus on independent learning and thought.

innovation	Initially this included all references to innovation but was changed in scope so innovative learning and teaching practices are now in 'pedagogy' and innovation here relates to developing new ideas, entrepreneurship etc
inquiry and discovery	Including involvement in research or projects and problem based learning.
international	This includes a global outlook, exchange and study abroad opportunities and approaches to increasing international student and staff numbers.
pedagogy	This is comments which directly relate to good practice, innovation or evidence based teaching methods and pedagogy.
research based	This includes opportunities for students to engage in research as well as research informed teaching or an integration of teaching and research.
transformative	These extracts comment on the transformative nature of learning.
What does the strategy tell us about what type of learning knowledge is valued	
decolonised	Specific references to decolonising the curriculum. Word searches did not bring up further examples. Consider adding to diversity code.
diversity and equal opportunities	Revisit this code. Consider changing to diversity including decolonising and moving items for equity and equal opportunity to qu 3 inclusion.
employability	This focuses on graduate outcomes, preparation for employment, careers etc
intellectual	Emphasises the intellectual nature of universities and being part of an intellectual community.
interdisciplinary or multidisciplinary	This includes references to interdisciplinary, multi disciplinary and working across disciplines.
What underpinning beliefs are evident in the strategy	
contribution to society	Statements that comment on the university's contribution to society. These include the role graduates play in their societies, working in collaboration with society to address societal needs, contributing through knowledge and research to solve problems. Ranges from 'public good' to more commercial aims.
economic	These are specific references to the economic contribution that the university makes to society.
global	Global reach and internationally renowned.
national	Focused on national impact.
regional or local area	Distinctiveness of the region or particular emphasis on contribution the university makes to the local areas.

shaping society	A subset of contribution with a particular emphasis on how the university through its work shapes society and the future.
skills and employment outcomes	Specific impacts on the labour market
democracy and democratic values	There is a strong emphasis on democratic values with some references to contributing to a democratic society.
distinctive and academic identity	Comments about how the university is unique or distinctive where these are specific but not more generic statements about research intensive or internationally revered. Also academic freedom - this may need to be separated but it collected here as a link to the independence of HE as well as the independence of the institution.
inclusion and access and diversity	Comments about access, inclusion, ethics, social justice, diversity. Some refer to diversity of both staff and students. Most are linked to access for diverse and non-traditional groups (some to address social inequality, some focused on attracting the best students). Some comments link to inclusive pedagogies but the main focus is access.
lifelong learning	Statements about lifelong learning or engaging with alumni
selective	Comments about the selective or highly competitive admissions. Interesting there are far more comments about inclusive access than selective processes. This code does not include general reference to selecting high quality applicants but is focused on competitive or exclusive practice.
sustainability	This includes general references to sustainability and those making a particular environmental statement. It is largely a subset of contribution to society but also links to knowledge contribution. Also about sustainable practice and future for the university itself.
value of knowledge	The contribution universities make to developing and sharing knowledge. This ranges from an ideological position of democratising knowledge and human understanding, to a more direct impact on solving societal and global challenges.

# Appendix I: an example of word trees

	University name)	Learning																																													
4 Cape Town	<table border="1"> <thead> <tr> <th>Word</th> <th>Length</th> <th>Count</th> <th>Weighted Percentage (%) ▾</th> <th>Similar Words</th> </tr> </thead> <tbody> <tr> <td>uct</td> <td>3</td> <td>96</td> <td>3.06</td> <td>uct</td> </tr> <tr> <td>vision</td> <td>6</td> <td>53</td> <td>1.69</td> <td>vision</td> </tr> <tr> <td>research</td> <td>8</td> <td>52</td> <td>1.66</td> <td>research, researcher, researchers</td> </tr> <tr> <td>university</td> <td>10</td> <td>46</td> <td>1.47</td> <td>universities, university, university'</td> </tr> <tr> <td>2030</td> <td>4</td> <td>42</td> <td>1.34</td> <td>2030</td> </tr> <tr> <td>students</td> <td>8</td> <td>40</td> <td>1.28</td> <td>student, students, students'</td> </tr> <tr> <td>developme</td> <td>11</td> <td>32</td> <td>1.02</td> <td>develop, developed, developing, deve</td> </tr> <tr> <td>society</td> <td>7</td> <td>31</td> <td>0.99</td> <td>society, society'</td> </tr> </tbody> </table>	Word	Length	Count	Weighted Percentage (%) ▾	Similar Words	uct	3	96	3.06	uct	vision	6	53	1.69	vision	research	8	52	1.66	research, researcher, researchers	university	10	46	1.47	universities, university, university'	2030	4	42	1.34	2030	students	8	40	1.28	student, students, students'	developme	11	32	1.02	develop, developed, developing, deve	society	7	31	0.99	society, society'	<p>20 references to learning</p>  <p>17 references to teaching</p>  <p>24 references to educate, education</p>
Word	Length	Count	Weighted Percentage (%) ▾	Similar Words																																											
uct	3	96	3.06	uct																																											
vision	6	53	1.69	vision																																											
research	8	52	1.66	research, researcher, researchers																																											
university	10	46	1.47	universities, university, university'																																											
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society	7	31	0.99	society, society'																																											

		<p style="text-align: center;"><b>Text Search Query - Results Preview</b></p> <p style="text-align: center;"><b>education</b></p> <p>16 References to knowledge</p>
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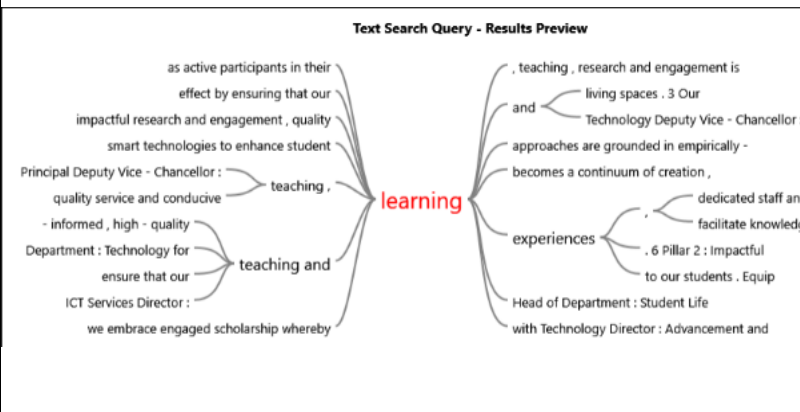
		<p style="text-align: center;"><b>Text Search Query - Results Preview</b></p> <p style="text-align: center;">52 references to research</p>
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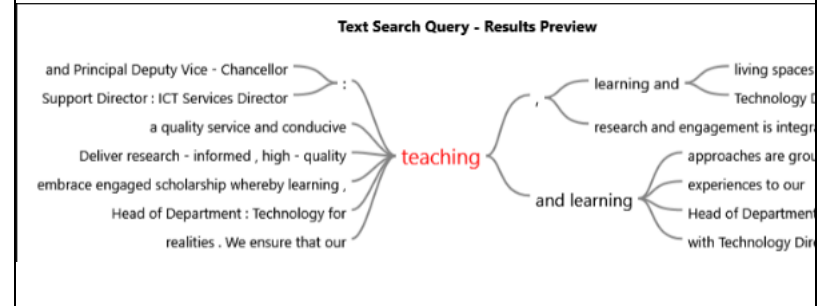
17 Tshwane

Word	Length	Count	Weighted Percentage (%)	Similar Words
director	8	31	2.29	director, directorate, director
technolog	10	26	1.92	technological, technologies,
university	10	21	1.55	universities, university
prof	4	18	1.33	prof
faculty	7	15	1.11	faculties, faculty
managem	10	15	1.11	management
dean	4	14	1.03	dean
engagem	10	14	1.03	engage, engaged, engagem
executive	9	14	1.03	executing, executive

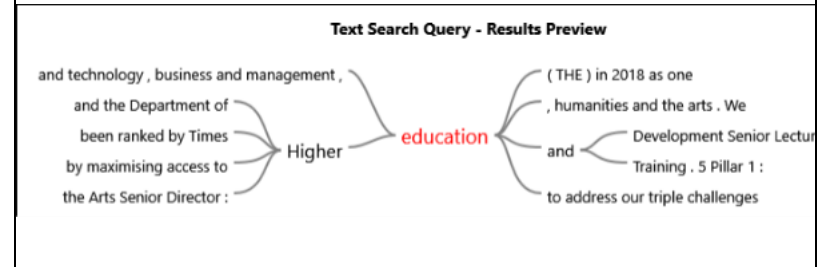
11 References to learning



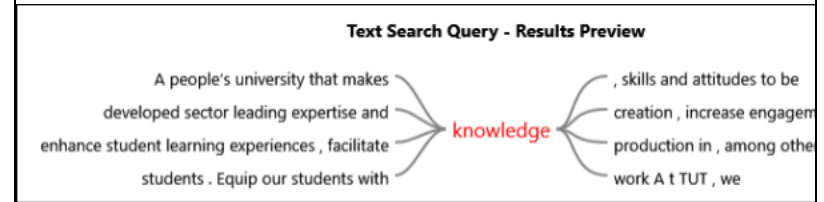
7 References to teaching



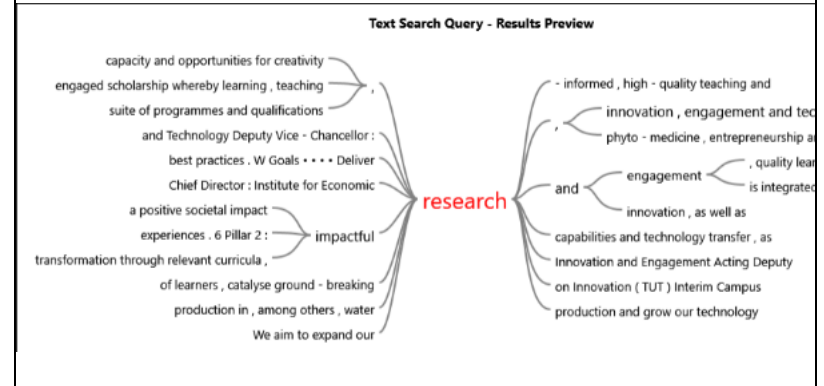
6 Refences to educate, education



4 References to knowledge



13 References to research



## Appendix J: word frequency analysis

University	Learning	Research	Teaching	Knowledge	Education	Students	Most freq word
University of the Witwatersrand (Wits)	5	1	4	3	2		research
Stellenbosch university	1	2	5	4	3		strategic
UCLA	4	3	1	5	2		campus
University of Science and Technology (NTNU)	4	1	5	2	3		development
University of Johannesburg	1=	1=	3	4=	4=		students
University of South Africa UNiSA	2	1	4	5	3		plan (or student if plan is excluded for being too generic)
Northwestern University	2	1	4=	4=	3		professor
Duke University	2	1	5	4	3		community (following Duke excluded as name)
Princeton University	4	1	3	5	2		university (or students if uni is excluded)
Johns Hopkins University	5	1	4	3	2		university (or research if uni is excluded)
North-West University	1	2	3=	5	3=		plan (or student if plan is excluded for being too generic)
University of Pretoria	5	1	3	2	4		university (or research if uni is excluded)
University of Cape Town	3	1	4	5	2		vision
University of Bergen	4	1	5	2	3		research
Brown University	4	2	3	5	1		students
University of South Eastern Norway	4	3	0	1	2		knowledge (followed by development)
Columbia College	4	2	3	0	1		students
Nord University	4	2	0	3	1		university (or educational if uni is excluded)
Norwegian University of Life Sciences	3	1	5	4	2		develop
Tshwane University of Technology	2	1	3	5	4		director (followed by technology)
University of Oslo	4	1	5	2	3		development

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University of Agder	3	1	5	2	4	development
University of California, Berkeley	4	1	5	2	3	students
University of Stavanger	4	1	5	2	3	development

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## Appendix L: examples of the role of universities

What do the strategy documents tell us about the role of universities?

A lot of common ground, recognise core activities of education and research with contribution to society.

Turning first to the role of the university, this features prominently in all of the strategies. For some this was general about the value of higher education, for others a statement about their particular position and distinctiveness. Norwegian universities even state an explicit societal mission. First looking at what the strategy documents tell us about the role of universities and this actually translates into a very consistent and strong message: universities research, teaching and impact on society. This offers a strong foundation for a sector that in the UK feels to be often under attack (mickey mouse universities, value for money etc).

In broad terms there is a lot of commonality in the way the strategy documents position the role of the university, focusing on the role in society, knowledge creation and dissemination, generating insight and solutions to issues facing society, developing the skills and capabilities students will need to play a meaningful role in society, research and innovation, scientific and sustainable development goals, solving global challenges, using knowledge to benefit society and engage in public debate. Whilst there is a lot of common ground this belies a difference in emphasis. Some are more specific about preparing students for employment and the world of work, some particularly focused on leadership, others highlighting the attributes to adapt to a changing world, others claiming a role in social justice and a positive impact on societies and local communities, even transforming society, many also claiming global impact. The following examples are taken to illustrate these points, these are organized under sub-headings to represent recurring themes. Each sub-theme has a brief positioning statement followed by some excerpts from the strategy documents.

### **Solving the world's problems**

The role of universities in working collaboratively with local societies and seeking solutions to problems was positioned as an integration of the different arms of the universities' strategies, bringing together education, research and wider communities.

"Together, our researchers and students will generate novel insights to address the challenges that face society today." (University of Bergen 2019, 4)

"NMBU shall contribute to safeguarding the basis for life in the future through outstanding research, education, dissemination of knowledge and innovation." (Norwegian University of Life Sciences 2019, 1).

"Our University is committed towards breaking down the ivory towers of academia by finding authentic and enduring solutions to our communities' most pressing problems." (Tshwane University of Technology no date,1).

"The African university shaping futures in the service of humanity." UNISA 2020, 3).

"Faculty, staff, students, alumni, and our larger community will come together to address the great challenges of our time" (Berkeley 2018, 1).

"To leverage our geographic position and public role, UCLA must increase the scope and effectiveness of existing and new efforts to create a positive social impact in Los Angeles, the state of California, the nation, and the globe through innovative research, teaching, and public engagement" (UCLA 2019, no pagination).

### **Developing knowledge and stimulating change**

As the focus of this project is the positioning of learning within the strategy documents, the claims about research have not been examined in depth but where research is integrated with teaching or in the general description of the role of the university it was included in the analysis.

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This means the examples here are about the positioning of knowledge rather than any in-depth claims about research specialisms.

“We will create new knowledge, educate people who will rise to the challenges of their era, and be a driving force for innovation and democratic development.” (Nord no date, 1).

“NTNU’s activities should benefit society as a whole and society can trust that our findings comply with best scientific practice.” (Norwegian University of Science and Technology 2018, 7).

“Through cooperation across academic, institutional and national boundaries, we will develop knowledge that contributes to a sustainable world.” (University of Oslo 2020, 1).

“The University of Stavanger will have an innovative, international profile and be a driving force behind knowledge development and societal change processes” (University of Stavanger 2021, no pagination).

“It gives effect to the Mission of the University to inspire its community to transform and serve humanity through innovation and the collective and collaborative pursuit of knowledge.” (University of Johannesburg 2021, 1).

“Central to the University’s strategy is that it can and must have a positive impact on its immediate and broader communities and environments, and that it is and will remain a hub of knowledge production that speaks to the global academic community.” (University of Pretoria 2011, 6).

“Since most new concepts are inspired by older ideas, the creation of new knowledge and understanding is most effectively fostered by exposure to diverse ways of thinking, researching, and knowing. At its essence, a university provides this exposure by promoting collisions that generate novel approaches to the arts, science, law, literature, medicine, and other fields, which in turn reshape our world.” (Duke 2017, 15).

#### **Educating future leaders**

Some of the strategy documents positioned their role as creating future leaders. These were from a mix of both South African and US strategies, interestingly no Norwegian universities emphasized this as part of their role.

“to cultivate and nurture the capabilities of the younger generation for them to become leaders in different spheres of life” (University of Cape Town 2021, 7).

“a first-class academic offering, which prepares graduates to lead and excel in a diverse world.” (Stellenbosch University 2018, 20).

“Pursue intellectual elitism as an approach that will nurture world leaders in their respective fields of engagement, and graduates through professional development and educational programmes that compare with the very best globally” (University of the Witwatersrand p.5)

“Pushes the boundaries of knowledge, challenges convention and expands opportunity to create the leaders of tomorrow” (Berkeley 2018, 1).

“educate students to be leaders in the 21st century” (Brown 2013, 5).

“knowledgeable to be leaders in developing our country and continent” (North-West University 2017, 3).

“Diversity is essential to Princeton’s efforts to meet the needs of a world that requires leaders who come from a wide variety of backgrounds and groups and who are able to work effectively across cultures and across political and social divides.” (Princeton 2016, 11).

“How do we ensure that UCLA educational programs prepare students for leadership in careers and communities?” (UCLA 2019, 2).

#### **Employability and business focus**

A number of documents mentioned equipping students with the skills and knowledge required for work and economic needs. This was certainly an output for those documents including detailed key performance indicators where employability of graduates is measured. However, the focus on business needs was much less prominent in the sample of documents than might have been expected given critiques about the increasing neoliberalism of education. The

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strategy documents place a much heavier focus on the role of the university to society than specifically to industry and governmental skills agendas.

“UiA is an active partner working with business and industry to ensure that our students are in demand and equipped for future employment.” (University of Agder 2020, no pagination).

“The USN will develop and present new, groundbreaking knowledge and offer education of a high international standard. The university’s main profile is profession and work-oriented, providing socially relevant education. Its research and education are both characterised by close interaction with regional society and working life.” (University of South-Eastern Norway 2022, 1).

“New knowledge, insight and solutions relevant to society and working life in the short and long term.” (University of South-Eastern Norway 2022, 8).

“equipping its graduates with the attributes necessary for adapting to the demands of a changing world of work” (University of Pretoria 2011, 7).

“A further strength is the University’s ability to educate a wide range of well-qualified professionals — doctors, veterinarians, engineers, lawyers, accountants, psychologists, teachers, social workers, ministers” (University of Pretoria 2011, 7).

“Graduate and professional students, as well as undergraduates, must have access to the resources and programs needed to optimally prepare them for their chosen careers after Duke.” (Duke 2017, 23).

“Graduates from NTNU are highly attractive to employers, both in Norway and abroad.” (Norwegian University of Science and Technology 2018, 15).

“educate candidates with both academic expertise and generic competencies that are internationally competitive in future working life.” (Norwegian University of Life Sciences 2019, 6).

“producing knowledgeable and high-level skilled graduates in line with the needs of the South African economy and society, and to replenishing our own human capital needs and those of other knowledge institutions.” (University of Pretoria 2011, 9).

### **Developing good citizens**

Linked to the societal good of universities, some strategy documents specifically talked about the influence they hold on developing citizens who will make a contribution to society. This was particularly prominent in the US documents.

“They renew the traditions of the university and carry the ideas of the university into the world” (Johns Hopkins no date, 17).

“prepare them to be engaged citizens of the world” (Duke 2017, 13).

“Princeton University is one of the world’s great teaching and research institutions, with an extraordinary capacity to educate people who will contribute to society and develop knowledge that will make a difference to the world.” (Princeton 2016, 1).

“A producer of students with knowledge and skills to act as world citizens.” (UCLA 2019, 6).

“Our mission directs us towards solving pressing societal problems and ensuring that our graduates are productive and active citizens.” (Tshwane University of Technology no date, 3).

“by educating and preparing students to discharge the offices of life with usefulness and reputation.” (Brown 2013, no pagination).

### **Attributes to adapt to a changing world**

With regards to preparing students for the future, some of the documents highlight the need for capabilities to navigate a dynamic future, acknowledging there is a role for universities much wider than disseminating existing knowledge. This is also evident in the references to lifelong

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learning and an emphasis on inquiry which are discussed in the section on the nature of learning below.

“UCT not only produces graduates for the labour market, but educates thinkers who are capable of shaping, adapting and responding to the unknown – global citizens who are actively responsible for the world they have inherited, and who will leave a better world for future generations.” (University of Cape Town 2021, 10).

“to prepare our students ..... to flourish in a world that neither we nor they can yet know” (Columbia College no date, 1).

“We empower our graduates by future-proofing them to successfully negotiate the rapidly changing world of work and make a tangible movement towards civic renewal.” (Tshwane University of Technology no date, 1).

### **Claims of distinctiveness**

Norwegian universities positioned their distinctiveness in relation to subject expertise or geographical location. This reflects the specialist nature of some of their provision and the emphasis on their regional impact. The sense of place is not limited to the Norwegian documents as can be seen from the example from the University of the Witwatersrand. Some comments about distinctiveness bely a more competitive edge, with universities making claims to their academic standing or reputation.

### **Unique position**

“NMBU represents a unique academic synthesis of environmental and life sciences, bio-production, veterinary medicine, technology, land use planning and economics that provides us with the perfect position to help solve these challenges and enable a sustainable future in line with the Sustainable Development Goals.” MNBU 1 “Our professional diversity, unique synthesis of strong professional environments and shared location at Campus Ås make us particularly well-equipped to contribute to the green shift that is essential for Norway and the world.” (Norwegian University of Life Sciences 2019, 2).

“The university’s main profile is profession and work-oriented, providing socially relevant education. Its research and education are both characterised by close interaction with regional society and working life.” p.1...“We offer education where people live and work.” (University of South Eastern Norway p.6

“NTNU’s strength is our competence in science and technology combined with academic breadth and interdisciplinarity. P.7...NTNU is a multi-disciplinary university with a strong profile in science and technology, and a focus on programmes of professional study. We contribute to Norway’s development. We create value – economic, cultural and social – and have a national role in developing the technological foundation for the future society. (Norwegian University of Science and Technology 2018, 11).

“Wits is fully cognisant of the continuing changes in the global, regional and local context for knowledge production. In this regard we are uniquely positioned to respond to the profound challenges of our times by exploring, much more vigorously, the use of our local and broader African context as a basis for groundbreaking, globally significant research.” (University of the Witwatersrand 2010, 5).

“We were America’s first research university, a model emulated throughout the United States, and, more recently, around the world.” (Johns Hopkins no date,2).

“For more than two centuries, the University of Oslo has studied, challenged and shaped Norwegian society and developed knowledge of value for the entire world. The quality and breadth of research and education places UiO in a unique national position and forms the basis of UiO’s status as a leading European research-intensive broad-based university.” (University of Oslo 2020, 1).

“Most modern universities are complex enterprises composed of multiple schools and subparts with varying goals and characteristics. Princeton is an exception to this pattern; it is a cohesive institution with a shared and intensely felt sense of mission. People often characterize

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Princeton’s distinctiveness by pointing out the University’s deep commitment to undergraduate teaching and the absence of large professional schools” (Princeton 2016, 1)

“UCT will distinguish itself by providing thought leadership on social justice. The lens through which we look at the world should be that of the collective public intellectual, participating in and influencing the public debate.” (University of Cape Town 2021, 10).

Relevant to the focus of this research it was interesting to see where initiatives to enhance teaching and learning were seen as important drivers for achieving future distinctiveness.

“The Task Force articulated a future vision for education at UCLA, where UCLA is the established leader in transformative approaches to teaching and learning at scale, and has expanded its impact far beyond the existing footprint of the campus. To achieve this goal, the Task Force proposes the creation of a campus-wide Institute for Innovation and Excellence in Teaching and Learning, which will serve as clearinghouse to amplify and link existing efforts in education.” (UCLA 2019, 1).

“Innovative education that recognizes the value of student-centered learning at all levels – undergraduate, graduate, and medical – is fundamental to our vision of Brown’s future.” (Brown 2013, 1).

## Appendix N: strong learning identity details from the strategy documents

University	Learning focus	Statement showing learning philosophy
Norwegian University of Life Sciences	digital and lifelong	<p>"NMBU will offer education and conduct research that encourage lifelong learning. Our efforts will be based on our learning philosophy, highlighting learning as a process and where responsibility for individual learning is central...NMBU will be a learning organisation noted for its inquisitiveness, courage and creativity." P.6</p> <p>"Digitalisation will promote teaching flexibility and increase access to learning resources for lifelong learning." P.5</p>
University of Science and Technology	innovative	<p>"We value and encourage innovation among students and staff as well as innovative teaching, research and artistic activities." P.9</p> <p>"Our learning environment is innovative and exciting" p.15..."our role as a partner for innovation is an even more distinctive characteristic of NTNU." P.15</p>
Stellenbosch university	collaborative	<p>"Collaborative learning provides the basis for the university to be a learning organisation – an organisation characterised by a shared vision, team learning, systems thinking, mental models and personal mastery (Senge, 2006; 2014)". P.11</p>
University of South Africa UNiSA	digital	<p>"Responsive student-centredness reflects our commitment to recognising, cultivating and promoting the interests and views students especially their lived experiences and prior learning in order to achieve academic access and success in an Open Distance e-Learning context." No pagination</p>
Northwestern University	experiential	<p>"Experiential learning is a cornerstone of the Northwestern undergraduate education. Whether it's producing a live TV broadcast or creating a business plan for an Internet start-up, the opportunity to put classroom course work and</p>

		academic theory into practice solidifies the learning experience." P.2
Duke University	learning communities	"Learning communities of faculty, students, and staff are at the core of academic inquiry and, as such, are crucial for the development of students' intellectual engagement." P.41..." ...  learning communities are described as "a signature of a Duke education" p.41
UCLA	active	"...a program educational excellence and innovation, taking into account projections of growth in the undergraduate population to 50,000 over a period of ten years and emphasizing active learning and new ways to think about both the teacher and the classroom." P.17
Pretoria	inquiry-led	"Developing an inquiry-led curriculum in building the foundation for knowledge, high-level skills and the pipeline of postgraduate students and researchers. Embedding a question-based approach in undergraduate teaching" p.10
Tshwane	digital	"Deploy digital and smart technologies to enhance student learning experiences, facilitate knowledge creation, increase engagement and accelerate technology transfer." P.9
Agder	participative and practice-oriented	"Ensure that our study programmes have a high degree of varied student participative and practice-oriented learning". P.1

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## Appendix O: Modules completed in part one of the thesis

- Your Course Modules for 17/18	
+ ED.R THESIS: Thesis (Educational Research)	
+ ED.S841: Connecting research and practice	
+ ED.S843: Researching Higher Education	
+ ED.S844: Evaluative practice in social policy domains: higher education	
+ ED.S845: Enhancing Higher Education: Policy and change processes	

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