

Compendium

Application Guidance and
Implementation Aids of the

QUALITY GUIDELINES

for a quality-based design of transnational education

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1 Preface

In the past few years there have been significant changes in the areas of education and advanced training. Key words like life long learning, new forms of learning, economic viability of educational institutions, quality and quality assurance and increasingly the internationalisation of education makes these challenges significant.

Whilst in this time a great number and diversity of quality requirements have emerged for companies and providers of educational services, there are until now no quality standards or guidelines for the area of international educational co-operation. In the face of this deficit the idea of developing guidelines for internationally orientated educational service providers arose. These QUALITY GUIDELINES have been available since 2008. They extend quality management systems of educational institutions to requirements on a quality orientated design of transnational relationships. The QUALITY GUIDELINES encompass both the quality of educational opportunities as well as the success of educational service providers, the success of your company goals and strategies, ensuring and increasing the effectiveness and not least the benefits for the learners.

The existing compendium serves to support the intent of educational organisations, which are planning to or already providing educational services and products for foreign customers, by developing a quality management system for the internationalisation process. This compendium perceives itself as an aid when using the QUALITY GUIDELINES to design the goods and services for an international market. It offers tips and explanations for the implementation of the requirements of the QUALITY GUIDELINES and furthermore makes user friendly methods and tried and tested instruments for the introduction and improvement of quality management systems in the area of education available.

The QUALITY GUIDELINES build on the quality management system QM STAGE-MODEL (PAS 1037:2004) developed in co-operation with numerous experts in educational theory and practice under the general management of the RKW Berlin-Brandenburg. Numerous suggestions and tips included in the compendium for PAS 1037:2004¹ also apply to the quality management of internationalisation processes in the area of economically oriented training.

The tips and aids summarized in the existing compendium of the QUALITY GUIDELINES therefore do not relate to every aspect of quality management in an educational organisation equally, rather they are focussed on the aspect of internationalisation.

Therefore it is recommended when designing the quality management for the internationalisation of the education organisation also to consult the compendium to PAS 1037:2004 and/or to use other instruments and materials of quality management which have been tried and tested in the relevant national context together with the present material for the quality guidelines.

The creation of the existing compendium for the implementation of QUALITY GUIDELINES was flanked and enabled by the formation of networks, bodies of experts as well testing right up to implementation into usable procedures. In particular the following institutions contributed to the development of the QUALITY GUIDELINES in the scope of a LEONARDO DA VINCI pilot project:

- Germany: RKW Berlin GmbH; RKW Brandenburg GmbH; bbw Bildungszentrum Frankfurt (Oder) GmbH (bbw educational centre Frankfurt); Bergische Universität Wuppertal (University of Wuppertal); Institut für Strukturpolitik und Wirtschaftsförderung gGmbH, Halle (Institute for structural politics and economic promotion); Steinbeis-University Berlin; Unternehmerverband Brandenburg e.V. (trade association Brandenburg), Cottbus; Prof. Dr. Wilske and Schliecker partnership management consulting and personnel consulting, Blankenfelde;
- Italy: GNOSIS Training Consulting & Research s.c., Venice;
- Poland: Zespół Szkół i Placówek Kształcenia Zawodowego, Zielona Gora; Zespół Szkół Budowlano- Drzewnych, Poznan; Zespół Szkół Odzieżowych in. W. Reymonta, Poznan;

¹ The Compendium – Application Guidelines and Implementation Aids of the PAS 1037:2004. Pro Business, Berlin, Germany, 2005

Sweden: Internationell kompetens AB, Malmö; Krinova Science Park, Krinova;

Spain: International House Company Training, Barcelona.

The notes and documents among other things are published in the QM ONLINE-FORUM (www.qm-online-forum.de or directly at www.leonardo-tgp.eu). The QUALITY GUIDELINES are also available via the database of LEONARDO DA VINCI projects www.adam-europe.eu.

In the compendium information for typical problems and recommendations for quality development and security are derived from the scientific knowledge and practical experience of the international education co-operation. It contains a range of methods and tools for management practice as well as sensible work instructions for a systematic and target orientated procedure. The core of this compendium is an extensive table with continuing information and additions to the individual requirements of the QUALITY GUIDELINES.

In the 2nd chapter the key elements of a successful and mutually advantageous international educational co-operation are explained in the targets and tasks of the QUALITY GUIDELINES. The principles for co-operation which are a central theme in the QUALITY GUIDELINES and define the manner of collaboration, are explained in more detail and it is shown how these principles can be found again in the concrete quality requirements.

Information about typical problems and recommendations for the sequence of a quality development and security are derived from pilot projects co-operations and collaboration with a widespread network of consultants and experts. Quality management, and this particularly in a heterogeneous and often dynamically changing international environment, requires the dedication of everyone involved in transnational educational services. These guidelines for quality improvement and this just like their underlying quality management system, the QM STAGE-MODEL, are made up of the features of a „learning organisation“, therefore critical self perception and the active involvement of interested partners in the modification processes. Therefore the 3rd chapter is dedicated to the participative processes of introducing a QM system. This procedure and process orientation is a crucial requirement for success for the quality management in the context of internationalisation of educational organisations.

In the 4th chapter the area of use of the QUALITY GUIDELINES and relevant expressions were explained in more detail. At the core of the chapter are the interconnected processes in the implementation of quality management systems. Orientated towards the PDCA cycle² it explains what analysing, planning, implementing and controlling as well as adjusting and optimisation means with a view to the internationalisation of educational. Further themes are continual improvement processes, the presentation of processes and their forms; the process orientated approach and self analysis as well as the documentation of quality management systems. The documentation requirements for the individual specifications of the QUALITY GUIDELINES are summarized and the relevant possible forms of documentation are named in a tabular overview.

The 5th chapter explains implementation aids for the quality requirements of processes for the internationalisation of educational organisations. In this context a range of methods and tools for management practice as well as sensible aids for a systematic and target orientated procedure are summarized. Strategic requirements have particular significance in this chapter. In this way the creation of a concept, situational analysis and strategy and resource planning are dealt with in the relevant separate sections. Further sections deal with carrying out internationalisation and result control.

The 6th chapter has a central position in the compendium. It presents the requirements of the QM STAGE-MODEL and those of the QUALITY GUIDELINES in a tabular form together with the relevant implementation aids. In a detailed form and requirement by requirement the specifications of a sector specific quality management system and also internationalisation are explained to the educational institution.

² Plan-Do-Check-Act-cycle according to Walter Shewhart and W. Edwards Deming, also known as the Deming cycle.

The 7th chapter provides a cross reference of the requirements of the QUALITY GUIDELINES and the QM STAGE-MODEL for ISO 9001:2008. In this way the requirements of the QUALITY GUIDELINES are easy to collate even for educational institutions who built up their quality management according to ISO 9001. The ISO is working on a standard for educational service providers, which is planned to be available in 2010 with the number ISO 13146. The authors of the QUALITY GUIDELINES are working on the compilation of this standard. It is already planned to extend the QUALITY GUIDELINES for the new ISO standard in the area of advanced training and to orient it towards this new standard. To facilitate the conversion the cross reference table should be extended to include further quality management systems.

The QUALITY GUIDELINES and the compendium are available in German, English, Polish, Italian, Spanish and Catalan. The authors are convinced that in the coming years further improvements, instruments and language variants will be added.

In addition to the QUALITY GUIDELINES the RKW Berlin-Brandenburg is preparing a tool for the valuation of internationally offered educational services (tqp.rkwbb.de). The **iQcheck** defines requirements on these educational products and makes them comparable. It allows the use of mutually agreed, acceptable and clear criteria for education services in international competition. In this way there will be a standard for internationally successful quality products in education and the question of what must be regulation in educational establishments in order to lead transnational education services to success will be answered.

We would like to thank everyone involved for their dedicated participation. Even in the future the authors will dedicate themselves to the theme of quality of education in international exchange of services. We look forward to constructive criticism and continuing information.

2 QUALITY GUIDELINES – Objectives and tasks

The QUALITY GUIDELINES are intended to cover the requirements of the internationalisation of training organisations. This means the QUALITY GUIDELINES are geared towards supporting the transnational commitment of the training organisations, the heart of which is the creation and realisation of training offers for foreign customers.

The QUALITY GUIDELINES are intended to answer the question of what needs to be regulated in the training sites to ensure the success of such an internationalisation project (transnational engagement) on the part of the educational organisation.

They also answer the question of how the necessary processes and resources are to be constituted and the way in which they are to be applied. For this reason the QUALITY GUIDELINES also contain the requisite criteria for quality assurance in international educational co-operation.

The QUALITY GUIDELINES must take into account such principles as:

- Acting to one another's mutual advantage
- Equality of partners
- Mutual respect for the independence and sovereignty of the parties
- Taking into account the interests and potential of all parties
- A balanced distribution of advantages and obligations among the parties
- The generation of synergies by exploiting mutually reinforcing factors
- Facilitating new forms of co-operation that go beyond traditional co-operation and the exchange of learners
- Making due allowance for differences between educational systems and economic frameworks
- Respect for human rights and basic freedoms; and
- Understanding and respect for all nations and tolerance of other cultures, civilizations and life-styles.

The development of Quality Guidelines for dealing with training organisations on an international level is very topical. Training and further education establishments are increasingly facing the challenge of internationalisation. There are numerous reasons for this, including the following circumstances:

- Exchanges between EU Member States are intensifying, supported by the processes of globalisation. This also means that those receiving training and taking further education courses are becoming increasingly mobile. Students and job seekers are crossing country borders. This means that the international comparability and creditability of degrees and the performances of training organisations is becoming an increasingly pressing issue.
- The home-grown market is facing increasing competitive pressure (both from domestic providers and increasingly through foreign providers). This increases the pressure on training organisations to become active themselves and to enter into new markets, if necessary abroad.
- In co-operation with the fundamental characteristics of a shift to a knowledge-based society, these factors increasingly require the adaptation, co-ordination and co-operation of the sector of professional training and further education beyond the limits of the national framework.

Internationalisation thus initially appears to be a necessity, the consequence of events and developments that cannot be prevented. However, for anyone who actively deals with these problems, it also offers massive opportunities for producing competitive advantages.

These opportunities exist in particular through

- the development of new receiver groups
- the improvement of internal knowledge and
- more effective service provision through the use of synergies that are developed from transnational co-operation, division of work and exchange.

However, effective use of the opportunities presented by the internationalisation of training organisations also means allowing for the need for changes, in particular those that result from processes such as

- increasing knowledge base of (almost) all work processes
- the increasingly commanding role of problem solution processes in daily work and the increasing need to manage the "unplannable"
- increasing internal responsibility with changing work tasks (against the backdrop of growing flexibility and mobility)
- increasing need for self-management and self-organisation
- consolidation of work and the increasing selection according to performance.

Against this backdrop, learning and training take on a whole new meaning. This is expressed in the increasing significance of life-long learning, in the move towards "new learning" and in the change – which is happening before our very eyes – from a professional training and further education market which belongs to the suppliers into a buyers' market.

This places a high demands on the development of the training organisations, which must also be considered with regard to the internationalisation of their activities. These requirements include the following

- gearing towards an increase in more self-organised, more individual learning processes
- growing role of the advisory accompaniment of learning
- consideration of the learning behaviour of adults
- increasing functionality of further education as a service offer linked to the market (EU service guideline, GATS)
- focus on the development of (professional) skills, which are increasingly taking over from traditional knowledge transfer
- introduction of training standard (ECTS, EUROPASS professional training)
- response to fragmented and individual needs.

The challenges that arise from these trends for the training organisations are looked at below:

- The transition from the majority focus on a traditional further education activity to a very different qualification that is geared more towards the actual process of the work studied as part of the qualification goes along with the trend of smaller participant numbers per qualification scheme. This places high requirements on the cost-effectiveness of the offers of the training organisations.
- The move away from purely traditional qualification types to different types of learning, also represents a balancing act between prompt and punctual practice-orientated qualification and simple induction-style further education. It is in this regard in particular, that the use of efficient quality management plays an increasingly important role in professional education.

With the current conditions of the change, the **importance of quality management** is growing in the area of training and further education. **Quality measurement and evaluation** are becoming ever more important as decision-making aids for planning and realising professional training and further education activities through consumers and providers.

Purposeful quality management, which allows the schemes on offer to be assessed and compared using transparent and binding criteria, makes the search for courses that correspond to the respective qualification goals much easier. At the same time, consistent quality management makes it easier for training organisations to continually provide new offers in order to meet the needs for qualification, which are now changing far more rapidly than in the past. And it allows them to do so without having to accept serious fluctuations or set-backs relating to the usefulness of the results and customer satisfaction.

Comprehensive quality management comprises quality modification (quality improvement) and quality information (for recipients of the training offers and training organisations themselves).

At a national level, the requirements outlined here are fulfilled for example with the QM STAGE-MODEL in Germany. The following characteristics of this reference model are in favour of quality management in professional training:

- Process-orientation of the system, compliance with EN ISO 9000ff:2000 and EFQM; specification and further development of the requirements of these reference systems in the interest of the transparency and comparability of the service provision
- Consideration of the specifications of further professional education as a personal service
- Consideration of the educational element of the service provision in the area of further professional education.
- Possibility of integration with other certification systems
- Graded requirements, that allow for responses to the different requirements of the training organisations for the introduction of a QM system
- Enabling of continuous quality development
- Double use as
 - systematic guidance for the introduction of a quality development system and
 - a self-evaluation tool.

QM STAGE-MODEL offers important bases for quality management in the context of transnational activities of training organisations. The purpose of this on the one hand was to expand and complete the QUALITY GUIDELINES. On the other hand, the applicability to the most varied of national and sector models and instruments of the quality management systems of foreign users of the QUALITY GUIDELINES had to be secured with a less dense set of regulations than those presented in the QM STAGE-MODEL.

Since the QUALITY GUIDELINES are intended as a completion of the existing quality management systems, they only contain such information that is essential for implementing quality management as part of transnational activities.

This relates in particular to information for developing the following inter-cultural **skills and abilities**:

- Basic understanding of one's own and other cultures
- How to communicate and act in intercultural situations
- Inter-cultural conduct of negotiations and the ability to handle conflict.

The definition of the QUALITY GUIDELINES

- mirror on the one hand the general and specific goals of the qualification and
- on the other hand help pave the way for achieving these goals (emphasising).

The guidelines themselves are structured according to the QM STAGE-MODEL and comply with the European Common Quality Assurance Framework (CQAF). They should allow for the following principles:

- make the training offer more transparent
- create trust and promote the compatibility of the qualification offers
- facilitate the co-operation between educational institutions.

In terms of transnational activities of the training organisations, the QUALITY GUIDELINES represent important **minimum requirements**, which must satisfy an effective system of quality evaluation and the quality management from our perspective. This includes the following criteria:

- Up-to-date offers
- Customer satisfaction (the offers must comply with the company's requirements and ultimately it must be possible to measure these against the requirements of their customers.)
- Minimum qualification of instructors
- Quality of the organisation of the training processes
- Suitable location, time and cost of the qualification

- Pre-selection of the participants based on verifiable entry requirements
- Minimum quality of the programmes and curricula as well as teaching and learning material
- Guarantee of practical relevance
- Comprehensive further education (goes beyond simply imparting specialist knowledge)
- Carrying out examinations (in particular final examinations)
- Transfer accompaniment for implementing further education results in companies.

The existing compendium is designed to help implement these requirements and practice-orientated activities in a standard way by calling on the following application aids and implementation notes.

3 Participative approach and process orientation – decisive success factors of quality management in the context of internationalisation of training organisations

3.1 Participative approach

The participative approach is a decisive success factor of internationalisation in two ways – in terms of the inclusion of international customers of the training offers and in relation to the active involvement of the training organisation employees in quality management.

The **participation of foreign customers** of the educational institution is carried out in particular through collecting and evaluating customer requirements. With this, a distinction must be made between the various customer groups and their specific requirements. This affects in particular the consideration of the specific notions, wishes and interests of the direct receivers of the training products on the one hand, and the respective decision-makers for the training request on the other hand.

The **participation of the employees** must be initiated and encouraged in a targeted way. For this, the necessary corresponding framework conditions must be developed. This way, allowances can be made for the experience that the quality development of a training organisation is only as successful as the extent to which the employees uphold and support it. Great importance is placed on employee-orientation of a reference model for quality management if it is to satisfy the requirement of comprehensive effectiveness in the sense of continuous improvement of the organisation and its service provision.

The experiences from training organisation quality management show that employee co-operation in quality work requires above all that,

- the employees are provided with details of the goals and the planned implementation procedures before development of the quality management system is started
- employees are involved from the outset in the development of quality criteria and the creation of the quality management procedure notes
- employees are provided with accompanying information and if necessary offered training opportunities
- employees are provided with free access to the quality criteria and procedural notes
- the employees' integration in the continuous improvement process is secured.³

The QUALITY GUIDELINES include notes of the conditions and requirements of the participative procedure in quality management, above all in the requirement groups 1 (in particular 1.13 "Vorbildwirkung der Führungskräfte" [Management role model] and 1.14 "Mitwirkung in der Ausprägung und Verbesserung des Managementsystems" [Involvement in the development and improvement of the management system]), 2 (in particular 2.1.3 "Information, Kommunikation und Sensibilisierung für Bildungsprodukte und -leistungen" [Information, communication and raising awareness of the training products and services] 2.1.4 "Systematische Kompetenzentwicklung und Beteiligung der Mitarbeiter/-innen" [Systematic skill development and involvement of the employees] , 2.1.7 "Dozenten und Dozentinnen als aktive Partner einbeziehen" [Integrating instructors as active partners], plus 2.3.1 "Einbeziehung der Dozenten und Dozentinnen in die Unternehmensentwicklung" [Integrating instructors in the company development] and 2.3.2 "Beteiligung von Dozenten und Dozentinnen an Bildungsprojekten" [Involving instructors in training projects] and 4 (in particular 4.9 "Partizipation und Empowerment" [Participation and empowerment]).

³ Cf GNAHS, Dieter and Helmut KUWAN: Qualitätsentwicklung in der Weiterbildung - Effekte, Erfolgsbedingungen und Barrieren [Quality development in further education – effects, success factors and limitations]. In BALLI, Christel, Elisabeth M. KREKEL and Edgar SAUTER (editor): Qualitätsentwicklung in der Weiterbildung - Wo steht die Praxis?, Berichte zur beruflichen Bildung, Schriftenreihe des Bundesinstituts für Berufsbildung, [Quality development in further education – where is the practice? Reports on professional training, series of the German Institute for Vocational Training]Book 262, Bonn 2004, p. 53.a.

3.2 Process-orientation

The QUALITY GUIDELINES use the process-orientated approach of the QM STAGE-MODEL, the standard DIN EN ISO 9000:2008 as well as other relevant standards.

For the practical use of the QUALITY GUIDELINES, its process-orientation is particularly important, since the solid guarantee of the use of "training products" according to the requirements of the receivers and the predictability and repeatability of the success for the realisation of further products of this type depend essentially on the guarantee of a solid execution quality of the service provision and the related management and support processes. The continuous improvement of the quality of the training products also requires its development process to be analysed and modified, i.e. the realisation of steps to increase the effectiveness and profitability of the goods and services in the education institution.

For this reason, process-orientation of a reference model for quality management is an essential part of its practical use as an instrument of the sustainable quality improvements and the securing of the competitiveness of the training organisations in question.

It should be stressed that reference systems for the quality measurement, evaluation and modification, which are geared towards the product alone, only have limited use in the area of education. This is in particular because of the fact that "training products" as such are difficult to compare against each other in further professional education per se. Unlike in the processing industry for example, where products are generally distinguished by numerous immediately comparable parameters that can be controlled by extensive standards, "training products" are all very specific, personalised and individual results of a service process. Apart from the fact that the "training product" is strongly depending on its individual consumer – the person learning – the comparability of these products is also inevitably very limited due to the variety of the target groups and targets, the content and the methods as well as the specific direction of the measures on offer. (This dilemma affects the selection of the "goods types" that can be compared in a training test if nothing else.) This applies even more in the context of the internationalisation of the training organisation, which must make very specific allowances for the fact that the way in which the "product" is perceived will be influenced by various cultural traditions and the related specific evaluations of training and learning.

So if only relatively few information for quality improvement can be gathered from a "product comparison" alone in the area of further professional education, there will be even less concerning the continually newly developing extraordinary changes to the qualification requirements or the anticipation of future requirements.

A fundamental requirement of the process orientation in the context of internationalisation of the training organisation is the consistent consideration of the fact that quality measures for transnational training activities do not just develop from the transfer of available quality requirements and measures from the organisation on an international level. They are extended by a complete range. In addition to the resources, skills, capabilities and authorities required on a national level for high-quality service provision specific requirements apply to resources and skills for transnational activities. Here it is essentially about inter-cultural skills; the knowledge of administrative conditions and requirements at the level of the guest countries in question and at an international level (in particular with regard to the process flow); and the competence for international project management.

4 Implementation notes for the introduction or improvement of quality management of internationalisation of training organisations according to the requirements and recommendations of the QUALITY GUIDELINES

The following implementation notes relate to the requirements and recommendations of the QUALITY GUIDELINES given in the table. They are based both on the process and co-operation-orientated QM STAGE-MODEL and the experiences the training organisations acquired during the internationalisation of their service provision.

4.1 QUALITY GUIDELINES – Application area

The QUALITY GUIDELINES define the basic requirements for quality management reference models. Compared to standards, regulations and provisions, they are more recommending in their nature rather than legally binding. The QUALITY GUIDELINES offer an information framework that

- describes effective ways, instruments, methods, procedures and rules for quality management in relation to the internationalisation process
- contains action-guiding recommendations for goal-orientation of the quality management
- demonstrates how the individual requirements for quality management should be approached.

In this way, the QUALITY GUIDELINES offer support in orientation and decision-making for increasing the efficiency of processes of service provision under standard (“normal”), characteristic requirements.

The following form part of the standard elements of the QUALITY GUIDELINES:

- Description of the tasks that are to be solved/the problem
- Illustration of possible solutions
- Definition of the success factors for problem solving (including the definition of various requirement levels)
- Illustration of action recommendations and conclusions

“The QUALITY GUIDELINES are primarily geared towards market-based working institutions in the private sector, and those in the public sector that are competing with other institutions in terms of the training they offer. The use of the QUALITY GUIDELINES by other training institutions is also desirable, however may be subject to adaption.”

The QUALITY GUIDELINES are aimed at supporting the internationalisation process for training organisations.

Internationalisation includes the market development and the development of business activities abroad at the level of individual organisations (including companies). However, it is not limited to specific types of market entry, but rather relates to the development of the entire training organisation. Essentially, internationalisation relates to the development of the assets of the training institution in question in order to initiate and implement transnational education processes.

“Transnational education processes as understood in the QUALITY GUIDELINES are the management, support and value-added processes involved in providing the following transnational education services:⁴

- *export of education as a cross-border service (e-learning, virtual education offers, media, courses, and training materials);*
- *education services offered to residents of other countries (target-group-specific courses for foreigners, study trips, language training, partly combined with tourism);*
- *education services offered abroad using teachers from the despatching country or local staff (education offers from subsidiaries or foreign branches; non-formal higher education; distance education & training; blended learning; training courses; coaching; workshops; specialized seminars; and private tutors);*

⁴ The arrangement is essentially geared towards the systems for international training services used by the World Trade Organisation (WTO).

- *international educational cooperation abroad (cooperation in the country of the cooperation partner or in other target countries, joint ventures, franchises); and*
- *international cross-border educational cooperation (cooperation on the development of education products and use of resources e.g. cross-border Group training, cooperation agreements, twinning).⁵*

4.2 Levels in the QUALITY GUIDELINES

The QUALITY GUIDELINES are based on the three levels for sustainable quality development set out in the QM STAGE-MODEL. Specific quality management requirements are to be met in each sector at each of these stages. These requirements are based on the respective principles of excellence in the EFQM model.

The three stages of requirements adopted from the QM STAGE-MODEL should guarantee that QM is usefully linked in to the existing organisational experience and quality management regulations of the education organisation in question.

Basic stage

The Basic level offers education companies that have not yet had a proper management system an “entry-level” QM system. The aim is to introduce measures which ensure the quality capability of the individual education processes and the organization as a whole. This includes taking account of the needs of business and the labour market, which are contained in the requirements to be met by strategy development, corporate planning and controlling.

The cost of introducing the QM system at this level is lower than for the other levels and saves resources. On the basis of the QM system at the Basic level the further development of quality management systems to both the Standard and the Excellence levels is possible and recommended.

Standard stage

The requirements made of the QM system go beyond the Basic level and expand it to include 24 elements within the requirements categories. It incorporates requirements corresponding to the present state of the art (e.g. ISO 9001, ISO 14001, EN 9100, ISO/TS 16949) of QM systems. In addition, an effective optimization is carried out for the peculiarities of the business-oriented basic and advanced training. Customer- and process-orientation are important features of this level.

Once the requirements of this level have been met it is possible to proceed to prove the conformity of the QM system with the requirements of DIN EN ISO 9001:2000 and 2008. For educational establishments in co-operation with industrial commercial companies the (additional / associated) certification conforming to the ISO standard may be worth recommending.

Excellence stage

This level enables educational institutions to gradually approach the model of the European Foundation for Quality Management (EFQM®) and develop their own sense of Total Quality Management for the company. The use of this level requires proof of having met the requirements of the Standard level. The requirements of the Excellence level again go beyond those of the Standard level and extend these to include 18 elements within the requirements categories. Total Quality Management covers the following: The management method of the educational organization focuses on quality, relies on the co-operation of all members (including free-lance lecturers and education consultants) and aims at long-term business success and benefits for all participants in the education process by ensuring customer satisfaction.

4.3 Relevant quality management terms in the context of the internationalisation of education organisations

Below is a list of the terms which are used in the Quality Guidelines to describe quality management requirements.⁶

⁵ See “Quality Guidelines“, chapter 2 - Application Area

Educational offer (often referred to as an “education product”)

Provision of learning scenarios and resources and control of the learning context in such a synchronized way that the learning activities of a participant/learner can be influenced or controlled in a deliberate and targeted manner.

Export of education

A range of education services offered abroad and provided according to the principles of the market economy. Education can be exported in many ways; the process generally requires cooperation on education between service providers, partners and the target groups in the target country in question.

Education project

Targeted project of a unique, complex kind with a definite beginning and end for initiating, developing, planning, implementing and evaluating educational offers in keeping with requirements.

Educational organizations

In the normative document of the QM STAGE-MODEL the terms “educational organization” or “education company” are used to refer to any organization offering vocational education that is concerned with the implementation of educational and corporate processes, regardless of its legal status, its status as a legal or natural person or its tax assessment.

Curriculum

Overall methodological-didactic concept covering the various learning processes, learning scenarios, learning resources and contextual conditions.

Internationalisation

As regards the individual organisations (including companies), internationalisation is the development of business activities abroad. The internationalisation of education organisations is aimed mainly at developing their ability to initiate and implement transnational education processes. Internationalisation also affects the development of the entire education organisation.

Competence

Understood here to mean the totality of skills, abilities and attitudes of the participants/learners, which are present in their dispositions and are developed in education processes as different kinds of potential (e.g. technical, social and self-skills).

In addition, the term “competence” is also used here in the sense of an educational organization that has to define authority and spheres of responsibility for the implementation of the educational and corporate processes.

Furthermore the term “competence” is also used here in connection with skills / knowledge management and means that the above-mentioned skills of the staff members/teaching staff are organized and developed in such a way that the education process is constantly conducted and improved in accordance with regulative parameters; internal synergy effects are achieved; and the education company has a sustainable competitiveness or superiority with regard to its rivals.

Competence, intercultural

Intercultural competence is the knowledge of how to interact successfully for all concerned with people from other cultures, and the ability and willingness to apply this knowledge to create synergies in a given situation. Within the organisation this applies to multicultural groups, and in relations with third parties it applies to every single interaction, for example with foreign business partners or participants in intercultural learning processes.

⁶ *ibid.*, most of the definitions given here are taken from chapter 3.2 “Terminology” of “The Compendium – Application Guidelines and Implementation Aids of the PAS 1037:2004”. Exceptions to this are *export of education, internationalisation, intercultural competence and twinning*.

Central features of intercultural competence are a basic understanding of one's own and other cultures, the capacity to communicate and negotiate in intercultural situations, the ability to lead intercultural negotiations and to solve intercultural conflicts.

Customers

Organizations or persons who commission and / or receive an educational offer and can decide whether this offer matches requirements.

Customer satisfaction

Customer satisfaction is a soft ingredient of success and can be measured on the basis of definite criteria. Customers perceive subjectively the degree to which their expectations of educational offers are fulfilled. Systematic measuring and assessment with due regard for customer satisfaction constitute an important basis for targeted improvements to the educational and corporate processes.

Teaching staff

Teachers take part in the education process and support the participants / learners in the learning process. They may be on the staff of the educational organization or external lecturers.

Participants

Learners are customers who use the educational offers of an educational organization and play an active part in both the education process and the result.

Twinning

This term describes the initiation and creation of partnerships (in this case in the education sector) to the partners' mutual benefit. Twinning in the education sector is a concept in which education service providers offer learning programmes which the students work through in the place where they live. In a subsequent face-to-face phase, material is then taught in the country of the education service provider.

4.4 Implementation of the quality management system in the internationalisation of education organisations

4.4.1 Requirements in the QUALITY GUIDELINES process-oriented approach governing the form of quality management

The requirements set out in the QUALITY GUIDELINES process orientation section are given both in the overview of the requirement groups (tables in Chapter 5) and in the sections below on the internationalisation process and its individual elements.

4.4.2 Identification of the relevant processes

The process-oriented form of quality management in the internationalisation of an education organisation requires first and foremost that the vital processes be identified and structured. To carry out this task with the quality needed to achieve its objectives, it is necessary

- to set clear goals for the selection of the necessary processes
- to then differentiate the processes considered according to the form of internationalisation at which the education organisation is aiming
- to separate and define the individual processes as clearly as possible whilst firmly establishing their content and logical connection to the other processes
- to keep the presentation of the necessary processes as simple as possible
- to examine rigorously the relevance of the individual processes and establish whether the process in question is really necessary for achieving the objectives of internationalisation
- to establish the processes which are critical to or will determine the success of the education organisation's internationalisation in the way it is aiming for
- to limit yourself to presenting and processing the key processes only.

This approach should ensure

- that there is a focus on the “key processes”
- that processes are “slim-lined” or simplified
- an optimal use of resources when implementing the processes
- that overly complex or inefficient processes are avoided
- that only a set and sensible number of persons are involved in the processes
- that the individual processes do not take too long
- that the internationalisation processes are designed to benefit customers and the organisation.

The QUALITY GUIDELINES provide key points of reference for identifying and categorising the relevant processes. The categories of and individual requirements can – if viewed in general terms – be allocated to key and universally valid internationalisation sub-processes which, in their form and relationship to each other, form the following basic schema:

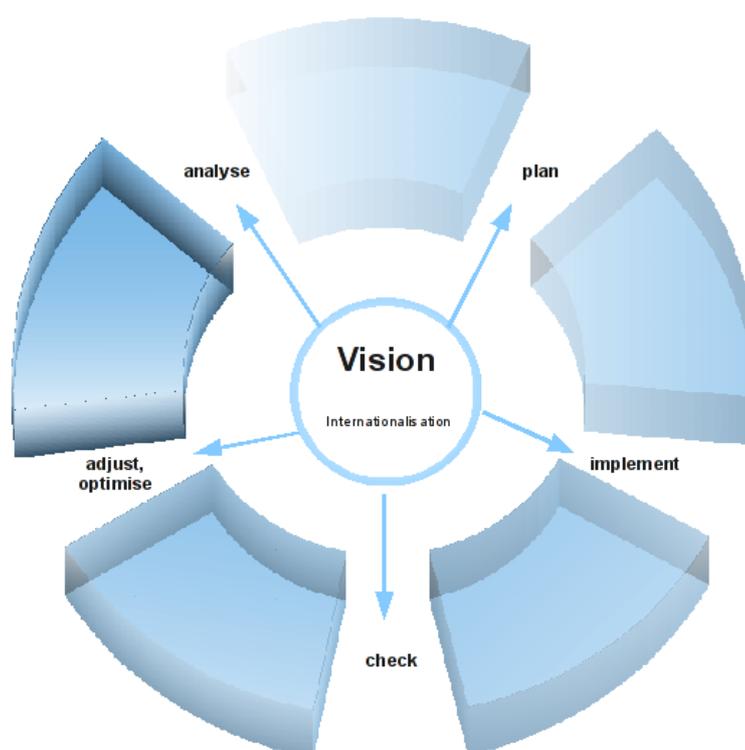


Diagram: Aspects of the internationalisation process

A clear and conscious consideration of these processes is a major prerequisite for the successful definition of the quality of internationalisation needed and for which the organisation should aim. In terms of the internationalisation process, the following aspects in particular shape the individual sub-processes shown in the schema above.

4.4.2.1 Vision: development of an internationalisation model

The QUALITY GUIDELINES require the active definition of the vision, mission and guiding principle and their presentation in a model (see also 1.2 “Guiding principle and quality policy” and 1.13 “Management leading by example”). The vision helps managers and employees of the education organisation to focus on the most important objectives of the internationalisation process. It also illustrates the expected benefits of internationalisation for the organisation.

The *vision* expresses expectations for the future; it is a mental anticipation of future developments. It must be linked to thoughts on the education organisation’s *mission* in internationalisation and to *values* if it is to be effective by providing guiding principles. The term *mission* refers to activities which

the education organisation intends to carry out to achieve its internationalisation objectives and obtain the hoped-for advantages. The *values* are to form the basis for an internationalisation code of practice governing the work of the education organisation. The principles defined here for the organisation's practices must be in line with the principles of international cooperation set out in chapter 4 of the "QUALITY GUIDELINES".

Vision, mission and values should be set out briefly and memorably so that they convince and inspire the wide range of groups at which they are aimed (for example employees, customers, potential partners of the education organisation.) They are documented in detail in the education organisation's *guiding principles*, which explain the individual aspects of the vision. Once defined in the guiding principles, the vision, the education organisation's mission defined by the vision and the code of practice become fundamental guidelines for the development of an internationalisation strategy.

To ensure the success of the education organisation's internationalisation in practice, the vision and guiding principles must be developed in line with the participative method of the process. In other words, employees who are to help to achieve the objectives of the internationalisation process must be included in the development of and discussions on vision, mission and code of practice – and in the continuous examination and development of points.

4.4.2.2 "Analyse": examine existing conditions and requirements posed by the education organisation's internationalisation

All chapters of the QUALITY GUIDELINES set out analysis requirements. It is explained explicitly in certain sections such as requirement groups 1.6. "Provision of resources", 1.11 "Management assessment of the organisation (Review)", 2.1.5 "Assessment and selection of lecturers", 2.2 "Establishing, providing and maintaining a learning infrastructure", 2.5 "Financial resources" and in the general category 4 "Measuring, analysing and improving education processes".

The analysis of the conditions and requirements for internationalisation must deal with the question of whether or not and to what extent the organisation has the minimum potential required for successful implementation of this process. It is, therefore, essentially an examination of the education organisation's so-called "potential quality", a term frequently mentioned in material on this subject. Potential quality is – after product and process quality – the third element of comprehensive quality management. It relates to the organisation's ability and willingness to provide a specific service. Analyses cannot be limited to merely checking the available material, personnel, financial and time resources if both these aspects are to be assessed. Analysis must include both a study of the existing organisational structure and an examination of the competences of both the entire education organisation and its individual employees.

Examination of prerequisites for successful service provision

Fundamentally, it should be noted that a merely international projection of conditions and factors governing the success of the education organisation's service provision is not sufficient. Such conditions and factors are, nevertheless, an important basis for education organisations if they are to offer stable and successful transnational educational work. The minimum prerequisites for starting international educational activities with any chance of success are, for example:

- in the field of **staff and organisational development** by the educational institution, in particular
 - the employees' ability to learn and adapt, to communicate and to cooperate and their responsiveness
 - a clear company strategy which is regularly examined and assessed
 - the optimisation of work processes, in particular the reduction of information loss at interfaces
 - an increase in flexibility, the development of a willingness to change and ability to innovate
 - revealing and solving conflicts in the organisation and
 - monitoring the services provided in terms of quality and scope.

- in the field of **service provision**, in particular the constant capacity to create and offer a marketable education range (educational products and services). The marketability required relates to factors such as
 - the quality of the products, the strength of a specific service profile and possible unique selling points, and thus the image of the services and organisation
 - the life cycle of the educational products and services and how participant-oriented they are
 - the service and price model (including discounts, service and payment conditions etc.).
- the availability of **transfer and communication structures** which could be used and extended for international activities. In terms of the organisation's transfer structures, in particular structures for the education transfer itself, the focus is on location(s), means of transfer (consultancy, professional development, company training courses, workshops etc.), logistics/process management, available networks etc.

The key aspect for communication structures is whether existing structures can be used for advertising/marketing, sales promotion, public relations, EDP etc. in the internationalisation of educational activities.

Assessment of company culture

You must examine whether the culture in the organisation - in other words the basic convictions, values and attitudes of both managers and employees - is suitable for broadening the entire education organisation's perspectives and perceptions in terms of targets, plans and tasks in the internationalisation of educational activities. You must also establish to what extent such aspects of company culture important to competitiveness and the international education markets are; for example the ability to make decisions, a willingness to take risks, rapid reactions, staying power, innovative ability, organisational skills, project skills and leadership qualities.

Competence analysis

Competence analysis is aimed at examining the abilities and knowledge the education organisation possesses for launching the internationalisation process or the extent to which it will be able to develop the necessary competences.

In terms of the **education organisation** as a whole, the acquisition of special qualifications for the internationalisation of educational activities concerns above all the following factors:

- Competences in the field of service provision

This involves abilities and experience relating to

- product development for the international market or for special national markets
- ensuring the quality and viability of service provision for the foreign market, if appropriate in foreign branches
- ensuring a customer-centred approach and the quality of service.

- Business competences

An important aspect of business competence is the generation of sufficient profits from services provided abroad and for foreign countries. However, many different tasks must be mastered here, for example financing, foreign currencies and exchange, banking, dunning, customs issues, dealing with administrative decisions and legal conditions, the form of business correspondence, complaints management, travel management and insurance issues in business with foreign organisations.

- Organisational competence

Organisational competences the education organisation requires for work abroad include abilities and experience in company development abroad, the organisation and development of cooperation with foreign members of a team, the successful implementation of cooperation with foreign companies etc. Also important are competences relating to the management of contacts networks; press management; the organisation of participation in conferences; trade fairs and exhibitions.

- Competences in the field of staff development

One focus here is on the ability to find and train good members of staff for work abroad, increasing acceptance of the education organisation's internationalisation on the part of all employees and motivating employees to support this objective.

At an **employee level**, there should be an examination of the extent to which competences exist or could be developed which would, realistically, make it possible to implement communication and cooperation processes with foreign countries (among others with customers, employees and partners there). These competences include both foreign language skills and professional competence, the necessary staff mobility and key competences such as tolerance of uncertainty, the ability to work in an international team etc. (*further details on this point can be found in 3.4.2.4 "Implement"*).

Alongside the aspects of the analysis outlined above - the company-specific conditions for internationalisation - **external conditions** must also be included in the study. This means in particular an analysis of the sector in which the education organisation operates and the competition in this field.

Adjustment expenses for education organisations are generally high, yet – above all as a result of the economic, social, political and cultural situation in the individual target countries – they vary widely. In view of this and of the diverse forms of possible internationalisation plans in the education sector, it is particularly important to structure analyses of existing conditions and the prerequisites for internationalisation in line with the type and scope of the planned and required activities. The conditions and prerequisites involved in this process always vary in scope and focus depending on the objectives defined at this stage. In terms of quality management, this means that an examination of prerequisites for the education organisation's internationalisation must always distinguish between: major aspects of transnational activities in the education sector such as exporting education; education services provided for foreigners in Germany and the opening of education organisation branches abroad etc. The organisation's own sphere of action must also be defined and delimited as precisely as possible from the very beginning.

4.4.2.3 "Plan": strategy and resource planning

Strategic planning

The QUALITY GUIDELINES set out strategic planning requirements in particular in requirement groups 1.1 "Strategy development and regular appraisal", 1.4 "Company planning", 1.1.7 "Identification and form of key strategic processes", 2.3.1 "Involvement of lecturers in company development" and 2.6 "Strategic business planning incl. risk management".

Strategic planning is a comprehensive process in defining long-term, fundamental targets and strategic spheres of action and business segments for the education organisation. Strategic planning for internationalisation takes account of the overall objectives of the organisation, the organisation's culture and the available resources, and is aimed at developing a medium-term and long-term internationalisation strategy.

The strategy to be developed (or to be continued and constantly updated) is aimed at

- the long-term development and realisation of cross-border activities and their inclusion in the policy of the education organisation concerned
- reliable planning for the establishment and development of core competences within the education organisation and the effective application of this planning in internationalisation.
- greater continuity in the development of the education organisation
- achieving the education organisation's medium and long-term goals in terms of business success, increased value and securing and increasing competitive advantages over rival service providers (in particular through greater customer proximity).

If the strategic planning meets these requirements, it usually reveals a large number of problems. These should be solved primarily through decisions on the use of resources for internationalisation - decisions which at the end of the day are to be taken by Management. This means the planning process itself must be implemented in several stages, taking account of the relevant competences of all sections of the education organisation.

Strategic planning involves:

- establishing a long-term action framework for later tactical and operative activities in the target markets the organisation is to work in
- grouping together company objectives and allocating measures and resources needed to achieve them
- establishing the best ways to achieve the objectives
- selecting suitable country market segments
- adapting the objectives of internationalisation in line with the overall and overarching objectives of the education organisation
- harmonising internationalisation objectives with other, equally important objectives of the education organisation (e.g. innovation, greater penetration of the national education market).

The **selection of promising target countries and market segments** is at the centre of strategic planning for internationalisation. Decisions on target countries, target markets/groups and the range of products to be marketed should, if possible, be based on a sufficiently exact definition of potential customers' education needs; such decisions should be accompanied by the **definition of the market launch strategy**. Decisions on future strategies for **market cultivation** including the form of service, communication, price and distribution policy should also be made at this point.

A key aspect in selecting the right internationalisation strategy is the decision on the type and scope of the work the education organisation is aiming for. Planning decisions are therefore to be geared towards this work, whether it is

- occasional work abroad (for example as part of temporary transnational projects)
- constant international involvement (for example through branches)
- investments in the establishment of educational institutions in the target country/target countries.

In planning, too, as in analysis, the cultural dimension and the major adjustment expenses it involves must thus also be carefully considered when initiating and implementing internationalisation processes.

Strategic planning is complex and varies in depth and sophistication depending on the capacity of and conditions governing the individual education organisation, and on the scope of the work it is aiming for in the internationalisation process. This poses the question of what the **minimum quality requirements for strategic planning** are. The following aspects appear to be key:

- Strategic planning must enable an active and offensive response to changing markets, competition and customer needs and to changing customer relations at an international level. It must remain open to innovation and make learning more individual, flexible and modular; it must involve the development of new learning packages and forms, of new learning sites and the use of new information and communication technology in education (for example Web 2.0). The strategy should therefore involve a wide range of flexible planning elements which leave various options open in line with changing circumstances (see implementation tools for requirement 3.4.3 "Flexibility" in the QUALITY GUIDELINES).
- You must ensure that the approaches to the internationalisation process selected when developing a strategy are appropriate to the education organisation's options and opportunities.
- A comprehensive analysis of the educational needs and demand abroad is not always practical (depending on the scope and form of the work planned).⁷ Where this is the case, i.e. where country-specific circumstances in the target country are not (able to be) established and it is consequently not possible to develop a product and service range geared to the actual demand, the education organisation must create a "traditional" supply-oriented product range in line with the proven current and usual international requirements and demands in the sector in question.

⁷ The Quality Guidelines only require proof of a set method for analysing education demand and the regular application of this method for the "Standard" category and above (see requirements category 3.1.2 "Development in customer demand").

Planning for the necessary resources

The QUALITY GUIDELINES contain information on the resource planning requirements, in particular in requirement groups 1.6 “Provision of resources”, 2. Provision and development of staff, teaching staff, learning infrastructure”, 2.5 “Financial resources”, 3.4 “Implementation planning”, 3.4.1 “Content, technical and resource planning”, 3.4.2 “Organisational planning” and 3.4.3 “Flexibility”.

Resource planning involves the implementation of internationalisation strategies developed by education organisations in concrete tactical and operational measures.

The education organisation must plan for the use of important resources and competences: this is a fundamental requirement if it is to build up and maintain competitive advantages through a better and/or more sensible use of its resource base.

4.4.2.4 “Implement” – implementation of the internationalisation strategy

Implementation of the internationalisation strategy drafted is completed during operational business which is characterised by a large number of interconnected activities and measures. The entire spectrum of service provision at the centre of internationalisation is examined and assessed as part of implementation of the education organisation’s activities abroad. Allocating these processes to “Organisation”, “Personnel” and “Products and services provided” makes it easier to consider them separately.

Organisation

The structure and processes of the educational institution must be adapted to international work in line with the chosen strategy. Account must be taken of both the requirements of the organisation and those relating to coordination and management of activities abroad.

Certain changes must be made to key processes in view of these requirements, for example

- service provision – creating the product and service range
- provision of resources
- product development
- accounting
- finance and investment processes
- information and communication processes
- marketing
- knowledge management
- cooperation, networking
- staff development, personnel management.

The QUALITY GUIDELINES provide comprehensive information on this point, for example in requirement groups 1.5 “Structure and process organisation incl. business segments and cooperation”, 1.6 “Provision of resources”, 1.8. “Information and communication”, 1.10 “Cooperation and networks” and in 2. “Employee, teaching staff and learning infrastructure procurement and development”.

Another important aspect is allowing for the participative nature of quality management in these implementation processes. Both the managers’ role as a model and the active participation of the employees should be ensured. This is outlined in the QUALITY GUIDELINES requirements, for example in 1.13 “Management leading by example”, 1.16 “Employee motivation, support and recognition”, 2.1.7 “Including lecturers as active partners”, 2.1.9 “Dialogue, communication and joint learning” and 2.3 “A partnership with teaching staff”.

Personnel

The professional development and provision of suitable personnel is a key point in the implementation of the internationalisation strategy: staff and managers’ acquisition and development of the competences needed for the internationalisation of educational activities is decisive for the success of this process.

The QUALITY GUIDELINES impose quality requirements for the implementation of this task, in particular in requirement groups 2.2 “Development of personnel (employees and teaching staff)”, 2.1.4 “Systematic competency development and participation of employees”, 2.1.8 “Systematic personnel development for employees and teaching staff” and 2.1.9 “Dialogue, communication and joint learning”.

It should be noted that the process of competence development must be carried out in line with both ability and enthusiasm.

Each employee should be involved in the relevant learning processes in a way suited to him or her. The objectives, tasks and content of the competences to be acquired should be defined and distinguished according to the employee group. Continuous implementation of a wide range of professional development measures for teaching staff and other employees is therefore an integral part of implementation of the internationalisation strategy. This includes not only the targeted use of internal sources of knowledge (employees with foreign language skills and experience of living or working abroad; intercultural competence including that gained at home) but also, for example, the use of external sources of knowledge such as that of customers of the education organisation (“customer knowledge”).

Special attention should be given to professional development measures for each employee who is to work at the interface with foreign partners. Such employees should build up the following competences in particular:

- Intercultural competence⁸

The employees concerned must have a strong basic understanding of their own culture and of other cultures. They must be able to cope excellently with cultural differences and uncertainties and show a high degree of tolerance, i.e. an acceptance of other cultures and the way of life and practices these involve. A central aspect in this area of competence is the ability to interact within a transnational framework. Intercultural competence includes communication competence in intercultural situations. This concerns not only “business fluent” language skills but also a wide range of other aspects of competence which lead to a willingness and capacity to create a constructive environment for work and discussion. chapter 5 of the QUALITY GUIDELINES gives a systematic overview of the individual elements of intercultural competence.

- Professional competence

This includes work experience, professional training etc. and involves knowledge of the socioeconomic, political and cultural conditions abroad. Knowledge of the ways and means to acquire relevant information plays a decisive role in this area of competence.

- Mobility

This area covers both the motivation and willingness to go abroad and the health of the employees; their physical and mental ability to cope with pressure and a realistic assessment of this. Stable family circumstances are important to a long-term and successful period of work abroad. Experience of international travel and traffic is likewise vital.

Strategic measures in staff and organisational development are required for the acquisition or further development of these competences. The most important aspect in terms of quality management is that these measures carried out as part of internationalisation are an integral part of the management and development of the education organisation.

Products and services provided

The QUALITY GUIDELINES also give a large number of requirements for the areas of “Products and services”; these requirements are set out above all in 3 “Designing, implementing and evaluating products and services”.

Raising the education organisation managers’ and employees’ awareness is a key factor for success, as the products are destined for the international market and – above all as a result of varying cultural features – demand and consumption there frequently differ from those on the domestic market.

⁸ A comprehensive definition and illustration of the various different aspects of intercultural competence can be found in chapter 4 of the compendium as an aid for implementation.

Adapting the products and services on offer to the needs of foreign customers raises issues relating to the form of the product in question, the price structure and payment conditions, the requirements governing service and accompanying product services, the cost of communication and adjustment processes and the question of whether the qualifications offered will be recognised.

Attention to the role of the customer is a vital aspect of products and services – all the more so as educational products and services usually contain specific features which set them apart from physical products, making them person-specific services.⁹

- The first decisive feature is that the service provided by the teaching staff is used even as it is created.

= simultaneous creation and use of the product

This means that the quality of results from educational products and services cannot be ensured by rectifying faulty "products" or removing them in the course of a final inspection; the approach is preventative: everything must be "right first time". One expression used to describe this connection is the inseparability of product and product use.

- The second decisive feature is that the customer plays an active part in the provision of the service; he or she is an integral part of the process of service provision.

= customer involvement

This means that the creation of the product/service and its results are largely outwith the immediate control and direct influence of the provider. Constant direct communication with the customer who has a decisive influence on the product/service is required in order to monitor how far it has been implemented and consequently to optimise it. The quality factor "customer focus" thus takes on a new dimension, for example when compared to service provision by manufacturing businesses:

- Permanent personal contact is required between provider and customer, teacher and student, in order to provide the qualification service. Customer-orientation – which is generally a decisive quality criterion – thus becomes essential in the field of education and professional development as "attention to the customer".
- Unlike in the production of material goods, the degree to which the expectations of the customers are met by their experience of the process of service provision plays a key role in the assessment of the quality of service provided by the educational institution. Issues of expected benefits and the establishment of customer trust thus play a decisive role in the implementation of educational institutions' internationalisation strategies.
- Thirdly, the service provided is after all not material, for even if suggestions, tables etc. are created in the course of lesson, the service is closely connected and defined by those involved in the provision of the service.

= immaterial nature of the product/service

This requires that employee-orientation as well as customer-orientation be considered as a major quality factor in professional training and development. Students as customers perceive the educational institution, the provider of the qualification service through individual contacts (teaching staff, management employees) with whom they generally associate it. It is therefore necessary that the employees be suitably qualified to serve as "representatives of the company". This involves both the development of appropriate competencies and adequate employee motivation.

These aspects are in principle a feature of all service processes, but take on a unique form in the field of education and further training due to the educational nature of the service provision process. The question of the quality of the service provided in this field is thus not least a question of the **educational quality** of service provision.

⁹ See also "Grundlagen zur Dienstleistungsqualität" ["Fundamentals of service quality"] in Hoeth, Ulrike and Wolfgang Schwarz: Qualitätstechniken für die Dienstleistung, [Quality techniques for services] Carl Hanser Verlag, Munich Vienna 2002, pp. 12 - 25.

4.4.2.5 “Checking” – examining the results

Explicit information on examining the results of the internationalisation process is provided in the QUALITY GUIDELINES, in particular in requirement groups 1.9 “Controlling”, 1.10 “Management assessment of the organisation (Review)”, 3.3.4 “Verification”, 3.3.6 “Evaluation of the educational products and services on offer”, 3.6. “Evaluation and determination of results; appraisal” and in the main category 4 “Measuring, analysing and improving educational processes”.

The examination of results concerns the development of the key aspects of the education organisation’s service provision. Particular attention must be paid to the fulfilment of educational requirements in terms of quality management in the educational institution. However, the quality of the internationalisation process achieved at the time of the examination can only be established if, starting with the process, factors in all three areas - process, product and potential quality - are examined. Below is an overview of the information needed for this purpose:

Internationalisation process requirements (Quality factors and key didactic terms)
PROCESS QUALITY
Planning
Reference to regulations and guidelines on action planning
Establishment of the customers’ needs
Definition of target group(s), consideration of target group specifics
Consideration of individual and contextual requirements (e.g. company learning culture, learning environment etc.)
Development
Didactic design and process suited to the target group(s)
Reference to participants’ experience
Development of specific measures in line with customer demands
Organisation
Level of detail
System, method
Coordination of individual aspects of the service/product
Participant-teacher relationship
Documentation of education schemes
Lesson evaluation
Implementation (teaching-learning process)
Subject-specific form
Participant orientation
Employee orientation
Interest orientation
Problem orientation
Practical focus, authenticity of the learning environment
Geared to independence (self-efficacy and initiative)
Directed on a goal

Internationalisation process requirements (Quality factors and key didactic terms)
Geared to the diverse ways in which information is absorbed, processed and reproduced ("learning with all 5 senses")
Situation (linking the acquisition of knowledge to concrete situations or applications)
Promoting self-managed learning (creation of scope for individual learning strategies)
Multiple learning perspectives
Promoting cooperation between students
Internal differentiation
Complaints management
Complaints management procedure
Documentation of complaints and responsibility for complaints management
PRODUCT QUALITY
Result
Examination results (average mark, certificates, qualifications)
Professional competence (applicability of knowledge, increase in abilities)
Methodical competence (perceptiveness, powers of judgement)
Social skills (greater ability to deal with others, assertiveness)
Reflexive competence (independence, dedication and motivation)
Success (output and outcome of the teaching-learning process)
Effect at work (attitude at work, job satisfaction, income, applicability of what has been learned)
Success on the employment market (percentage still unemployed, percentage successful)
Overall economic effects (unemployment figures, growth rates)
Overall societal results (opportunity to participate, social stability, social integration)
QUALITY POTENTIAL
Institutional conditions
Site
Equipment (value, age, condition of the fittings, premises and tools, state-of-the-art technical equipment)
Knowledge and experience of the education organisation
Range of products and services offered
Relations with sector if applicable
Image of the education organisation (type, scope and effectiveness of public relations work)
Personnel requirements
Employee/teacher numbers and qualifications (qualification standard)
Professional, adult education and intercultural competence of the staff
Level of employee and teaching staff satisfaction; motivation

When selecting and applying tools for examining results, it is useful to differentiate between the steps "Results check" and "Results evaluation". **Results check** (assessment of current situation)

Recording the current stage of implementation of the internationalisation strategy is fundamental to ensuring that the causalities between individual processes and their effects are transparent. On this basis, the implications and consequences of changes can then be established and the opportunities and risks they involve weighed up against each other.

Content:

- Record of results to date
- Establishing the extent to which tasks have been fulfilled
- Recording changes around the education organisation, concerning competitors or customers (e.g. shifts in focus of interests)
- Establishing developments in education concepts and technologies and changes in norms, standards etc.

Instruments:

- Key figures and indicator systems
- Customer satisfaction analysis
- Organisation culture audit

Results evaluation (target/performance comparison)

The information obtained from the current situation assessment for individual internationalisation implementation processes is compared to information on the target situation taken from the target analysis based on the strategy and objectives. Findings on efficiency and effectiveness of ongoing internationalisation processes can be drawn from the target/performance comparison. On this basis, the measures needed to improve and alter these processes can then be identified and prioritised.

Content:

- Assessment of the effects of activities to implement the internationalisation strategy
- Analysis of deviations from plan
- Examination of objectives to date
- Risk assessment
- Determination of the starting point for changes
- Identification and prioritisation of problem areas/critical points/weak points

Tools:

- Benchmarking
- Best practice comparison
- Monitoring, in particular education monitoring
- Balanced scorecard
- Analysis of strengths and weaknesses
- SWOT analysis
- Potential analysis
- Internal audit
- Review
- Self-assessment.

To make full use of the opportunities and scope offered by a participative quality management approach to assessing the need for change, progress meetings should be held with teaching staff and other employees.

In order to determine rapidly and reliably any necessary adjustments and their form, changes within and outwith the education organisation should be monitored on as constant a basis as possible.

4.4.2.6 “Adjust, optimise”: drawing conclusions from processes to date and preparing for continuous improvement

QUALITY GUIDELINES process optimisation and adjustment requirements for continuous improvement are set out in 1.1 “Strategy development and regular appraisal”, 1.14 “Cooperation in the development and improvement of management systems”, 3.5.5 “Problem management and corrections”, 3.6.4 “Securing experience”, 4.6 “Error correction and prevention” and 4.7 “Improvement process, improvement projects”.

When identifying the measures and activities required for adjustment and optimisation, a distinction must be drawn between those which are important for the initial implementation/introduction of individual steps in internationalisation plans and those which are needed to maintain and control the internationalisation process following its launch. The first category includes the adjustment of tried and tested procedures, tools and methods from other aspects of the education organisation’s business development and fundamental management procedures for internationalisation (for example the use of PAS 1037 tools to introduce quality management for the internationalisation process).

The second category, maintaining and controlling internationalisation, relates to both measures to ensure continuity and corrections and changes which are essential to achieving the required quality.

4.4.3 Continuous process improvement

Continuous improvement, which involves optimisation, adjustment and change, is the main way to secure the medium and long-term success of internationalisation.

Continuous improvement of internationalisation processes involves measures such as

- carrying out corrections whilst remaining within the scope and terms of previous planning
- if necessary adjusting planning if considerable changes occur
- launching activities to avoid or reduce risk.

The continuous improvement process operates on the basis of

- problem analysis
- the collection, evaluation and acceptance of proposed solutions
- the definition of actual steps to be taken including the establishment of responsibilities and available resources
- the implementation of improvements
- monitoring success

A continuous improvement in processes has achieved the quality necessary for long-term and sustainable effectiveness if

- the changes and adjustments to process direction and structure recognised as necessary are implemented as rapidly as possible, or planned within an appropriate timeframe.
- a conflict resolution system is in place to solve and process outstanding conflicts of objectives and resources and make these productive for process optimisation. This takes on greater importance in the development of transnational cooperation and increases with the amount of effort necessary to overcome difficulties, which arise above all from the differing role and importance of central cultural dimensions
- change management above and beyond the optimisation of key strategic processes is initiated which links strategy development to the further development of the educational institution’s organisational culture
- it is rooted in an employee-oriented and participative organisational culture and
- this activity draws in foreign partners and employees who
 - both bring in new perspectives and thus help to increase the education organisation’s options at an international level and
 - enable a change of perspective in the way the educational institution is viewed which makes it possible to discover and employ previously unused resources for further internationalisation.

4.4.4 Process presentation and form

An important tool to help review complex quality management processes with their wide range of activities, procedures and interconnections and make them comprehensible is to present them in diagrams. The most common types of diagram are process maps, organisational matrices and correlation matrices.

Process map

The process map shows an organisation's most important processes. It is possible to cover and document several different spheres of action. No matter what actual form the process map takes in an education organisation or how many details are in the end shown, a few general rules always apply to their presentation:

- Presentation of the processes in the organisation in line with customer requirements and customer satisfaction, shown as input/output
- Differentiation between key processes (immediate service provision) and management and support processes
- Ensure diagram is easy to follow by limiting the number of process levels included.

Below is an example of a process map for the internationalisation of an education organisation¹⁰:

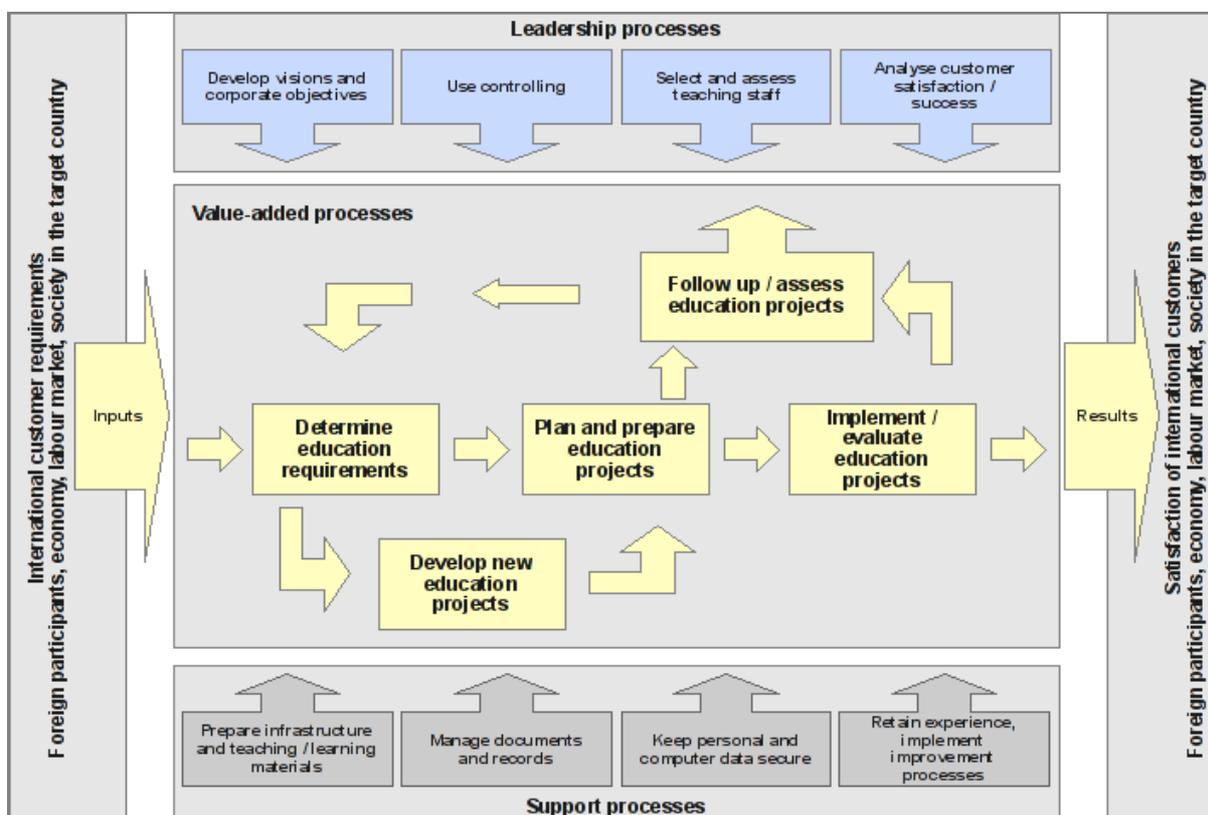


Diagram: Process map for the internationalisation of an education organisation

This type of diagram showing the interplay of various processes can, when used in a sensible and targeted manner, inspire managers and employees at the education organisation to reflect on their work and can provide information on the form of cooperation.

Any existing quality management documentation should be included when preparing the necessary information for the development of the process map. Amongst other things, this reveals gaps or repetition in the documents which can then be dealt with.

¹⁰ Based on the sample process map in "The Compendium" for the implementation of PAS 1037:2004

Organisational matrix¹¹

This is a matrix showing the interplay of responsibilities and tasks/processes. Their development and use should be seen not only as the duty of the organisation in the strictest sense of the word, but also as a challenge for the communication structure within the education organisation.

Correlation matrix¹²

When applied to the development of quality management systems, the correlation matrix forms a table showing the relationship between the various different processes in the organisation. This clearly and concisely demonstrates which activities are necessary for the implementation of individual sub-processes in line with quality requirements.

4.4.5 A process-oriented approach and self-assessment¹³

Self-assessment by the education organisation plays a key role in ensuring process-orientation with the quality approach pursued under the QUALITY GUIDELINES. It is essential to the rapid planning and implementation of the internationalisation process and its individual elements. Self-assessment on the part of the education organisation is thus an important prerequisite for continuous improvement. Self-assessment is necessary at all stages of implementation of quality management systems for the internationalisation of educational institutions. It should be documented appropriately.

Self-assessment is aimed at

- assessing the extent to and quality with which objectives have been achieved
- revealing the organisation's own strengths as well as potential for improvement
- determining the degree to which the education organisation has met the requirements governing its quality management system.

Notes on self-assessment requirements are given in the QUALITY GUIDELINES, in particular in 1.1 "Strategy development and regular appraisal", 1.11 "Management assessment of the organisation (Review)", 1.12 "Responsibility for the QMS", 3.6.2 "Evaluation of success", 3.6.3 "Evaluating success with the customer", 3.6.4 "Securing experience" and in the main category 4 "Measuring, analysing and improving education processes".

4.5 Quality management system documentation

If the quality management system is to be effective, it must be documented. Documentation is key if the objectives, tasks and results of quality management are to be communicated adequately and in the appropriate detail to all parties; to the managers and employees involved, to partners and customers and to the interested public. Documentation ensures that the requirements set out in the quality management system are binding and guarantees systematic monitoring of the extent to which they have been met.

To ensure that documentation of the quality management system effectively fulfils its function, the processes to be documented must be selected with care. The significant must be distinguished from the insignificant or less significant and energy should be focussed on those tasks which are vital to achieving the internationalisation objectives the education organisation has set. When selecting the processes to be documented, particular attention should be paid to the following factors:

- the effect on the quality of the products
- risks in the selection of target markets
- risks relating to unsatisfied customers
- varying importance of key cultural dimensions in the organisation's own country and in the target country or target region

¹¹ An example for an organisational matrix for education organisations is enclosed in "The Compendium" for the implementation of PAS 1037:2004.

¹² At the place already cited, an example for the elaboration of a correlation matrix can also be found.

¹³ Comprehensive information on self-assessment processes and the relevant methods and selection criteria are given in chapter 5 of the compendium. Criteria for self-assessment of implementation of quality management systems for the internationalisation of the education organisation are set out in chapter 4.1.

- legal/official requirements
- customer and ordering party requirements
- economic risks
- effectiveness and efficiency
- qualifications and experience of the employees and lecturers (competencies)
- complexity of processes.

Below is a summary of the internationalisation processes and sub-processes to be documented in accordance with the requirements of the QUALITY GUIDELINES.

Overview: Selection of processes to be documented in line with the QUALITY GUIDELINES requirements

Content and type of documentation	requirements category:	Instruments
Documentation of the internationalisation strategy / examination and continuation of documentation	1.1	Strategy paper/ regular protocols
Documentation of intercultural competence in the guiding principles of the education organisation	1.2	Guiding principles/ Competence matrix
Key quality figures for examining the quality objectives	1.3	Indicators and key figure system
Description of the skills to be required/reinforced	1.3	e.g. competence matrix/checklist
Documentation of the personal responsibilities of managers and employees for the internationalisation of the education organisation	1.3	Organigram
Documentation of the internationalisation objectives	1.4	Guiding principles
Clear presentation of the organisation of the internationalisation process	1.5	Organigram
Proof of the acquisition of knowledge of the specific communication culture of foreign partners	1.15	Records
Proof of the development of a culture of recognition within the organisation	1.16	Criteria sheet/ regulations
Examples of successful key strategic processes	1.17	Process descriptions
Proof of an organised requirement structure incl. development objectives for employees and teaching staff	1.18	e.g. Competence matrix, learning plans for individual jobs, definition of competencies and responsibilities
Documentation of the processes of competence development and participation	2.1.4	Protocols, standardised forms
Documentation of the results of dialogue, communication and joint learning	2.1.9	Protocols, standardised forms
Documentation of the appropriate establishment and design of the learning locations	2.2.1	Description
Documentation of resource management	2.2.1	e.g. Investment plan
Documentation of the organisation's services to ensure sufficient participant support	2.2.2	Process descriptions

Content and type of documentation	requirements category:	Instruments
Proof of the inclusion of lecturers in the acquisition, implementation and guarantee of the success of educational measures	3.2	Action plans, decisions, protocols
Proof of active involvement in education and economic networks	2.3.3	Records, media documentation
Proof of a systematic procedure for acquiring and transferring knowledge within the company	2.4	Procedure descriptions
Documentation of systematic demand analysis, financial planning and appropriate financial controlling to prove economic viability	2.5	Organigrams, checklists
Proof of the application of suitable methods and instruments for strategic planning of transnational business incl. risk management in company practice	2.6	e.g. Balanced scorecard, risk assessment table
Proof of cooperation with customers	3.1.1	e.g. Records
Proof of the establishment and consideration of customer requirements	3.1.1	Demand analysis
Proof of knowledge of the educational structures and the education and further trainings systems in the individual target countries	3.1.1	Records
Proof of method for education demand analysis and its regular application	3.1.2	Indicator systems, results protocols
Proof of systematic customer communication	3.1.4	Protocols
Proof of the introduction and application of systematic customer management	3.1.6	Description of procedures, protocols
Proof of the introduction and application of methods to promote the individual learning processes	3.2.2	Description of procedures, learning diaries etc.
Proof of knowledge of the economy and the education and employment systems in the individual target countries	3.2.3	Documentation
Documentation of the development results	3.3.3	Curriculum
Record of the results and findings of verification	3.3.4	Protocols
Clear documentation of changes to the curriculum	3.5	Standardised work-sheets for problem analysis and documenting changes, protocols
Record of the results and findings of the evaluation of education offers	3.3.6	Evaluation protocol
Proof of organisational guidelines and checklists for organisational planning	3.4.2	Organisational guide-lines and checklists
Documentation of education offers implemented according to plan	3.5.1	Standardised forms

Content and type of documentation	requirements category:	Instruments
Proof of the implementation of modern learning concepts, methods for promoting individual learning processes and flexible forms of learning	3.5.2	Lesson protocol
Guarantee of a regulated system to adjust process-related documents and records	3.5.3	Process diagrams
Qualified documentation of individual learning outcomes	3.6.2	Learning diaries, protocols
Documentation of personal responsibilities for the purposeful initiation and of process-related learning on the part of employees in the context of internationalisation	3.6.5	Organigrams, protocols
Record of processes and their interaction, including business process models	3.6.6	Process landscape/ business process model
Proof of method for determining customer satisfaction for different forms of learning and customer groups	4.2	Description of procedure
Documentation of the effectiveness of the quality management system	4.4	Key figures on turnover, customer satisfaction etc.
Documentation of the education organisation's objectives and purpose in internationalisation to be examined	4.4	Indicator system, schemata for comparing education offers
Evaluation of the data collected using statistical analyses and assessments of trends and success	4.5	Statistics, diagrams
Proof of an evaluation of the results of internationalisation as an integral part of success analysis	4.5	Analysis, report
Proof of error prevention in previous educational measures	4.6	Protocols
Proof of actual projects for improvement for each business year	4.7	Protocols
Documentation of progress in the internationalisation of the education organisation	4.7	Indicators, statistics
Proof of the systematic delegation of responsibility and a willingness on the part of the employees to take on responsibility	4.9	Description of tasks, action plans
Proof of social acceptability and effectiveness of the internationalisation of the educational institution	4.10	Media reports, opinions of persons active in educational policy and of the social partners
Summary of requirements in the form of key indicators and proof of the trends in development of these indicators	4.11	Indicator system

This overview makes it clear that the processes and tasks to be documented vary widely in scope and function but are overall nevertheless essential to achieving the internationalisation objectives of the education organisation. It also illustrates that the form and instruments used in documentation can differ greatly depending on the aspect in question.

A wide range of methods and instruments is available for presenting processes in documentation. This includes

- diagrams
- written instructions
- checklists
- tables
- flow charts
- visual media
- electronic tools
- protocols
- organigrams
- matrices

The varying scope, function and purpose of the documentation material to be provided and the need to show both individual documents content and the relation between documents makes a clear structure for all documentation absolutely necessary.

The creation of a “document pyramid” with several distinct levels has proved useful in this area. Such a pyramid usually includes

- 1 QM guidelines
- 2 descriptions of procedures and processes
- 3 descriptions of work, activities and tasks
- 4 forms, lists and model documents.

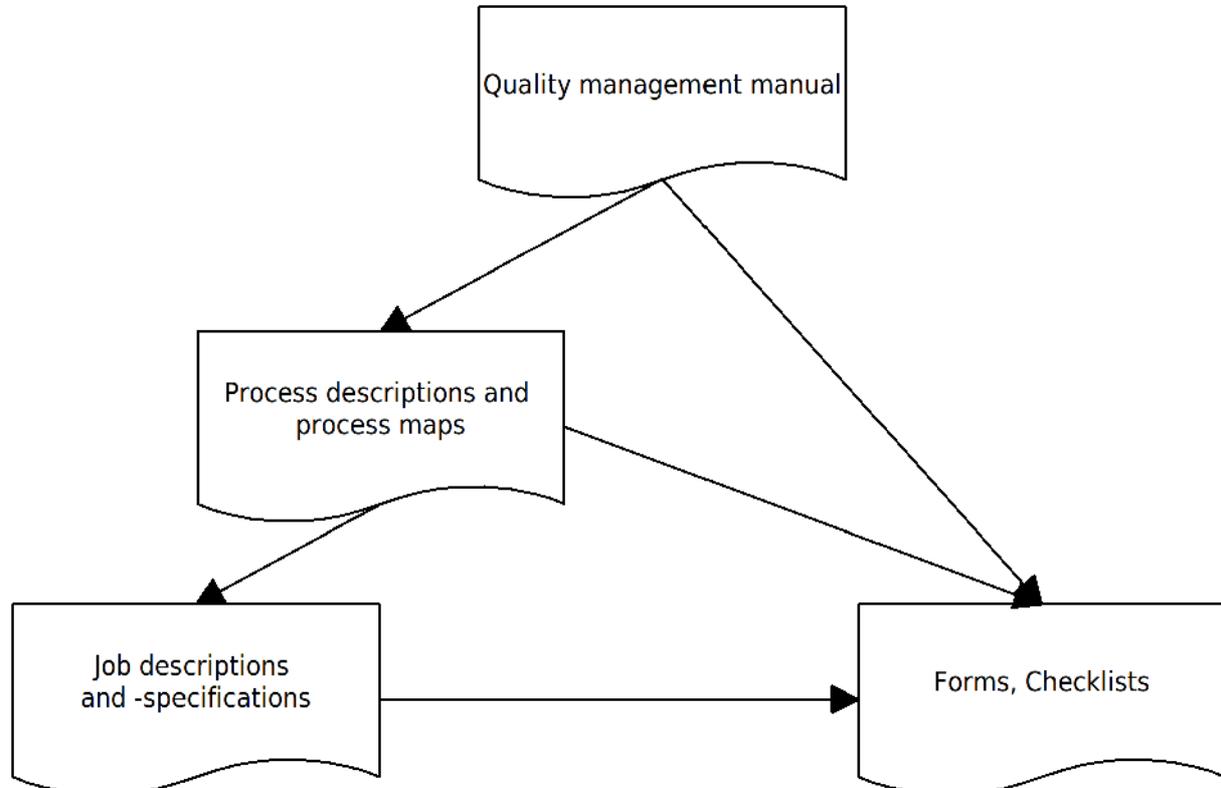


Diagram: A QM system “document pyramid” (Source: “The Compendium” of the PAS 1037:2004)

A clear distinction between *QM documents* in the strictest sense of the word and *records* is important to the sensible and useful documentation of the education organisation’s QM system.

A QM document is an “**instruction**”. It defines how a process or activity is to be carried out. A record, on the other hand, is “**proof**” that the results of the work in question have been recorded.

Records such as

- minutes
- results of measurements
- records of examinations, inspections, evaluations
- attendance lists for training courses and instruction sessions
- photos of circumstances and events
- records of results in EDP files and much more

are therefore essential if the **effectiveness** of the procedures and processes used and the QM system itself are to be documented.

Documenting the quality management system

Overview:	Requirements governing the creation and use of a process description
1.	A process description is binding for all employees involved and can only be changed by the management
2.	In order to prevent the loss of unique selling points (in particular as regards the competences of the education organisation), process descriptions are not made public
3.	Individual steps can be described in more detail in job instructions
4.	A distinction must be drawn between general and product-specific process descriptions
5.	If there are several process descriptions, these must be prioritised (e.g. top priority for process descriptions of fundamental improvement concepts and process descriptions for the implementation procedure for individual proposals)

Overview:	Typical process description structures
1.	Purpose
2.	Scope
3.	Responsibility
4.	Definition of terms/Abbreviations
5.	Description of procedures 5.1 Procedure 1 ... etc.
6.	Appendices: applicable documents/updates

5 Aids for implementation: sub-process and process element quality requirements in the internationalisation of education organisations

In view of the importance of measuring and assessing quality in decisions on the planning and implementation of internationalisation projects, the education organisation must be clear about which minimum requirements are to apply to the structure of individual processes and individual process elements. The fundamental requirements in each case are described in the QUALITY GUIDELINES. Additional, more in-depth and precise information on the quality requirements for individual processes and process elements is provided below. The relevant information and suggestions relate to problems which play a key role in the success of internationalisation. It is based on practical experience and the results of debate and discussion and thus reflects the “state of the art” in this area of education organisation work.

5.1 Aids for implementation: developing internationalisation guiding principles

A pyramid diagram of vision, mission and guiding principles will help promote managers’ and employees’ self-understanding and inform customers, partners and the public about the basic purpose of the education organisation’s internationalisation:

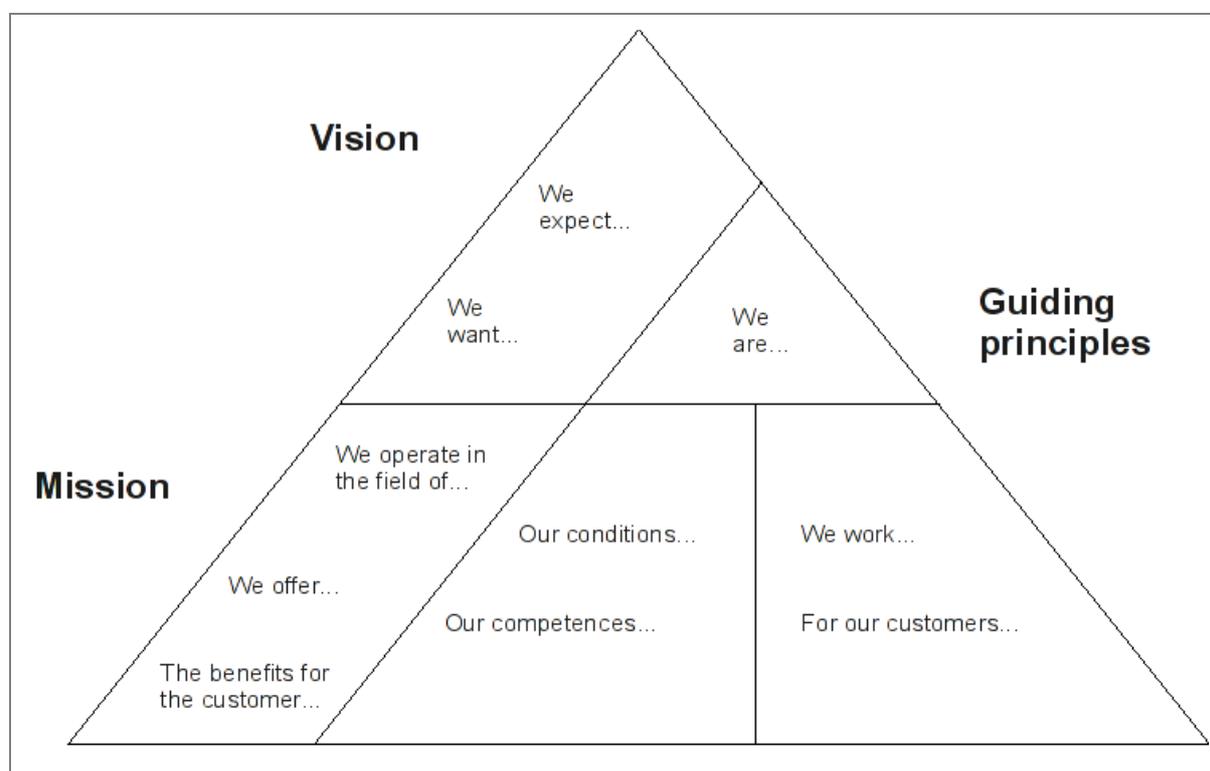


Diagram: Sample presentation of vision, mission and guiding principle

5.2 Aids for implementation: examining existing conditions and prerequisites for the internationalisation of the education organisation

The successful implementation of transnational education processes is inconceivable if the education organisation is not in a strong position to start with. Fundamentally, it is possible to determine both internal and external factors which influence the substance and potential development of the education organisation in the context of internationalisation.

It is therefore important to the long-term success of internationalisation that the current position and the education organisation’s potential in terms of its vision be thoroughly and carefully considered before the project starts, and that the external influences and basic conditions affecting the transnational project be defined.

This strategic situational analysis involves the analysis and assessment of the processes shown in the diagram below.

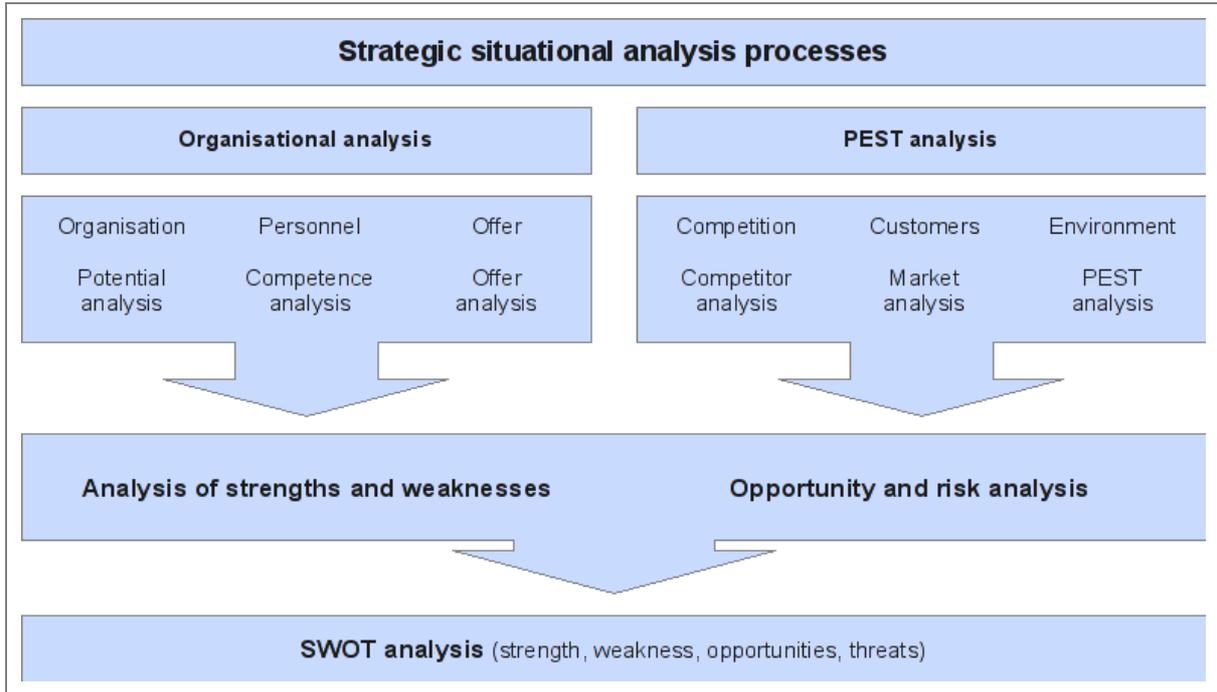


Diagram: Elements of strategic situational analysis

Options open can be determined from the strengths and opportunities revealed in the SWOT analysis, and the vision of internationalisation can then be verified on this basis.

Analysis of strengths and weaknesses		Opportunity and risk analysis	
Strengths (internal)	Weaknesses (internal)	Opportunities (external)	Risks (external)
Strategic challenge:		Strategic challenge:	
Options:			

Table: Analytic instrument

To be able to carry out the above processes to the required quality, the following **minimum requirements** must be adhered to.

- Analysis and assessment of internal influences on the internationalisation project in terms of
 - the organisation (analysis of potential)
 - the personnel (competence analysis) and
 - the range of products and services (range analysis)
- Analysis and assessment of the external influences on the education organisation's internationalisation project in terms of
 - competition (competitor analysis)
 - the customer/participant (market analysis)
 - the environment (PEST analysis)

According to a BMBF [German Federal Ministry of Education and Research] study of German providers of further training services on international markets,¹⁴ there are four main problem areas in this sector for the international market:

- a lack of profitability
- a lack of market transparency
- difficult legal or social conditions abroad
- insufficient employee qualifications.

Other problems linked to these such as relatively high language barriers, a lack of products for foreign participants, a lack of experience in cooperation or willingness to cooperate and a failure to bring together common interests are also liable to lead to the failure of internationalisation.

The following questionnaire¹⁵ is a useful aid in avoiding this danger; it focuses on both the internal and external areas of analysis above to assess the internationalisation potential of the education organisation. The relevant requirements in the QUALITY GUIDELINES should also be taken into account:

Overview: Questions on the education organisation's internationalisation potential

- What were the most significant strengths and weaknesses of service provision in the past in terms of quality, price and service compared to major competitors?
- Can our range of products and services be tailored to the needs of specific foreign markets?
- How necessary is it to adapt our range of products and services to the foreign markets on which we are planning to operate?
- Do we have the necessary resources for such an adjustment or to extend the range of products and services we offer? Is the expense in appropriate relation to the expected returns?
- What trends in demand are appearing for the education and service we offer? Which phase of the product life cycle are our main products and services currently in?
- At what cost could we transfer our previous business model (in particular our core competences) to foreign markets?
- Can we maintain our previous competitive advantages?
- Do we have suitable strategies to publicise our range of products and services abroad?
- How much of our capacity is already used by our current business? What available capacity is there in the areas which would be directly affected by internationalisation (Administration, Marketing, Finance)? How could we absorb increases in cost?
- How can we deal with additional tasks arising from commitments abroad in terms of organisation?
- What personnel support and resources can the management rely on? What additional measures or organisational changes would need to be put in place?

¹⁴ BMBF study "Deutsche Weiterbildungsanbieter auf internationalen Märkten", [German providers of further training services on international markets] p. 48

¹⁵ see iMove Checklisten zur Internationalisierung von Bildungsdienstleistungen, [Checklists for the internationalisation of education services] Version 6/2006; BMBF study "Deutsche Weiterbildungsanbieter auf internationalen Märkten", pp. 48-50

- What internal training costs should we expect?
- What additional knowledge is necessary for entering foreign markets?
- Do we have sufficient knowledge of the target country?
- Do the teaching staff to be sent abroad have sufficient foreign language skills?
- Do we (above all the company and the teaching staff) have sufficient skills in working and dealing with cultural differences?
- How internationally-oriented are the managers?
- What information and communication structures are already in place? Can sufficient technical communication options be maintained? Is there a need for investment?
- What adjustments are necessary for communication, in particular as regards prospectuses, brochures and the website?
- What is our financing basis/financial leeway for operations abroad? Does the organisation have sufficient financial capacity?
- What are our options for hedging risks? Has a comprehensive risk analysis been carried out and appropriate risk management put in place?
- What are the best case and worst case scenarios considering the potential country markets and market entrance strategy?
- Have we already considered collaborative partnerships which could be of help to us in operations abroad (e.g. cooperation with export companies and education institutions in the target country)? Do we already have links with other countries which could be of use in this internationalisation project?
- Is there a possibility of gaining political support for our internationalisation project?

5.3 Aids for implementation: strategy and resource planning

Aids for implementation which offer appropriate instruments and methods for strategic and resource planning can be found in the compendium on implementing the QM STAGE-MODEL according to PAS 1037 on which the QUALITY GUIDELINES are based. The information below will therefore focus on planning internationalisation.

An examination of the future international field of action shows what international challenges could affect the education organisation's internationalisation project. The organisation must first realise that these challenges exist.

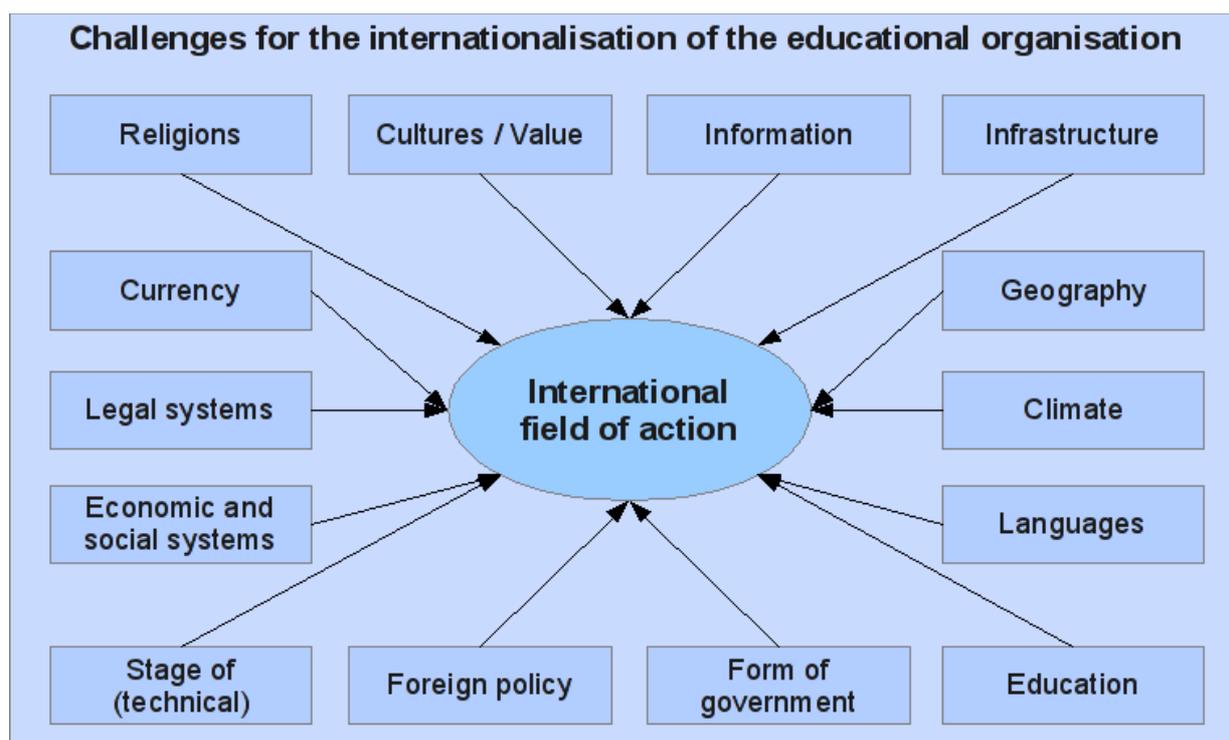


Diagram: Challenges for the education organisation's internationalisation project (Source: Wiesner)

Analysis and assessment of the potential target countries

As internationalisation always proceeds in relation to specific countries or groups of countries, there must first be a careful consideration of the conditions, opportunities and options governing the work of the education organisation in question in these countries. The following minimum requirements must be adhered to for such an analysis if this process is to meet the necessary quality standard. Account must be taken of the context of the internationalisation project in question and of the type of transnational education processes to be carried out as described in the QUALITY GUIDELINES.

Minimum requirements

1. *Appraisal of the current political, economic, social and cultural developments in the potential target countries*
 - Analysis and assessment of the basic conditions and risk factors posed in the categories above which would affect the internationalisation project
2. *Appraisal of the potential target markets*
 - Analysis and assessment of the countries in terms of their market attractiveness (prospects of success on a market)¹⁶. Aspects to be considered in relation to the internationalisation project include:
 - market growth
 - market volume (e.g. potential target countries'/companies'/people's education budget)
 - competition/cost/price/structure; infrastructure
 - resource structure (e.g. relevant funding and/or qualification programmes)
 - Establishing the growth in demand on the education and employment market in the potential target countries. (Has demand for further training been assessed and determined accurately enough? Do we have enough information on this point?)
3. *Analysis and assessment of the barriers to entering the potential target countries*
 - Barriers to entering the market
 - Official barriers (bureaucratic hurdles, legal conditions e.g. licence requirements, recognition of qualifications)

¹⁶ Country typologies may be useful at this point. These allow you to cluster the potential target countries, for example on the basis of various different indicators in core markets, promising markets, possible markets and markets in which the organisation will not operate. Such a country typology can be found for example in Sachse, Uwe: *Wachsen durch internationale Expansion*, [Growing through international expansion] 2003

Market barriers (language barriers, cultural barriers)

Internal barriers in the education organisation itself (language barriers, psychological barriers, cultural distance to potential target markets, false assessments)

- Barriers posed by the environment

At this point, it is useful to determine external factors affecting the internationalisation project using a PEST analysis. A distinction can be drawn between the following factors:

a) Legal and political factors

- Political stability
- Restrictions on foreign investments
- Freedom of trade and economic freedom, customs duties (no legal restriction on the export and import of services or their provision in the country in question)
- Technical standardisation
- Import quota regulations

b) Economic factors

- Gross national product
- Economic growth
- Income distribution
- Currency convertibility and rates of exchange
- Market volume for the products and services on offer
- Inflation

c) Socio-cultural factors

- Language barriers
- Language diversity
- Population structure
- Values and norms
- Acceptance of the products by the various different ethnic groups

d) *Infrastructures and local conditions* which affect the processing of cross-border transactions including

- banking services
- transport routes
- energy supply
- communication networks.

The more detailed the PEST analysis, the greater the number of calculable and concrete measures for the education organisation it can be used to develop. Matrices, such as Wiesner's country check matrix, are useful in assessing the effects of the environment on possible business activities:

	Legal and political factors	Social and cultural factors	Economic factors	Infrastructure and natural conditions
Target country A	X	X		
Target country B			X	
Target country C	X		X	X
Target country D		X		X

Table: Country check matrix

In the context of the country analysis, it should be emphasised that the question of international **comparability and the recognition of the qualifications offered by the education organisation** is of key importance and must be accurately assessed. This aspect is referred to in the QUALITY GUIDELINES in 3.3.2 “Educational products and service range requirements”.

4. Analysis and assessment of the extent to which the cultures of the potential customers (participants) and companies in the potential target country correspond to the culture of the organisation’s own country. This analysis should consider

- behaviour (way of life, management style, working style, communication style)
- focus (values, norms, standards, etiquette)
- the subconscious (subconscious basic cultural assumptions, unquestioned, innate).

As the internationalisation of education organisations increasingly also involves intercultural encounters and the export of culture, it is important to examine which cultural dimensions are present in the potential target countries and how pronounced these are. The education organisation must approach these cultural dimensions with appropriate effort and willingness to adapt if it is successfully to internationalise. Cultural dimensions comprise the following aspects,¹⁷ each of which should be considered and examined (see also requirement group 1.15 in this QUALITY GUIDELINES compendium).

- Power distance
This cultural dimension concerns the way in which people in a given country approach inequality. A low power distance means that a culture is geared above all to equality between people, the involvement of each individual in the society’s decision-making processes and a highly developed culture of discussion and debate. High power distance manifests itself in a broad acceptance of inequality, hierarchies and extreme power differences.
- Individualism v. Collectivism
 - Individualism is characterised by loose bonds between individuals. Each individual is expected to take care of himself and his family.
 - Collectivism sees people as part of closed “in groups” with strong bonds from the time they are born. These bonds provide protection but also demand unconditional loyalty to the group.
- Masculinity v. Femininity

¹⁷ See also Hofstede, Geert: Lokales Denken, globales Handeln. Interkulturelle Zusammenarbeit und globales Management. [Think Global, Act Local. Intercultural Cooperation and Global Management] 3rd edition DTV-Beck, 2006

- Both categories refer to the acceptance or adoption of socially and culturally defined roles, an acceptance which can be found in both men and women.
- Societies in which gender roles are clearly distinct from each other and in which the man is largely active in the outside world, competitive and extremely assertive are termed masculine. Women in such societies take on a more emotional role. They are seen as domestic, defensive and family-focussed.
- In feminine cultures, there is an emotional overlap between these traditional roles. Both women and men in such societies are, for example, sensitive and seek consensus. Quality of life is more important than economic or social success.
- Willingness to take risks v. uncertainty avoidance
 - Uncertainty avoidance describes the extent to which members of a culture feel threatened by ambiguous or foreign situations. This leads to a need for predictability and written and unwritten rules. The extent to which rules and regulations, norms, rituals and dogma are used indicate the level of uncertainty avoidance.
- Long-term oriented v. short-term oriented
 - Long-term oriented societies value virtues relating to future success, in particular perseverance, order and economy.
 - Short-term oriented societies value virtues relating to the past and present.

The categories formed by the cultural dimensions provide a useful approach for a cultural comparison. Cultural comparison here does not mean the quantitative collection and presentation of average statistics for specific behaviour, but rather the comparison of the typical behavioural patterns of two different cultures. For example, it might be useful to compare Polish and German employees' polychronic and monochronic approaches to time.

The analytical procedures proposed here create a detailed picture of the opportunities and risks of operating abroad in the potential target countries. The minimum requirements described above facilitate the achievement of the necessary quality for analysis and for the internationalisation process. A comprehensive country portfolio can then be drawn up on this basis and this enables a specific selection of countries or the selection of a target country on the basis of objective criteria.

When evaluating the factors important to internationalisation, the interests of the education organisation should also always be kept in mind as these play a decisive role in determining the scope and extent of your commitments abroad.

5.4 Aids for implementation: realisation of internationalisation strategy

5.4.1 Entering the market in the target country

The following aspects should be considered before entering the market in the target country to ensure the necessary quality:

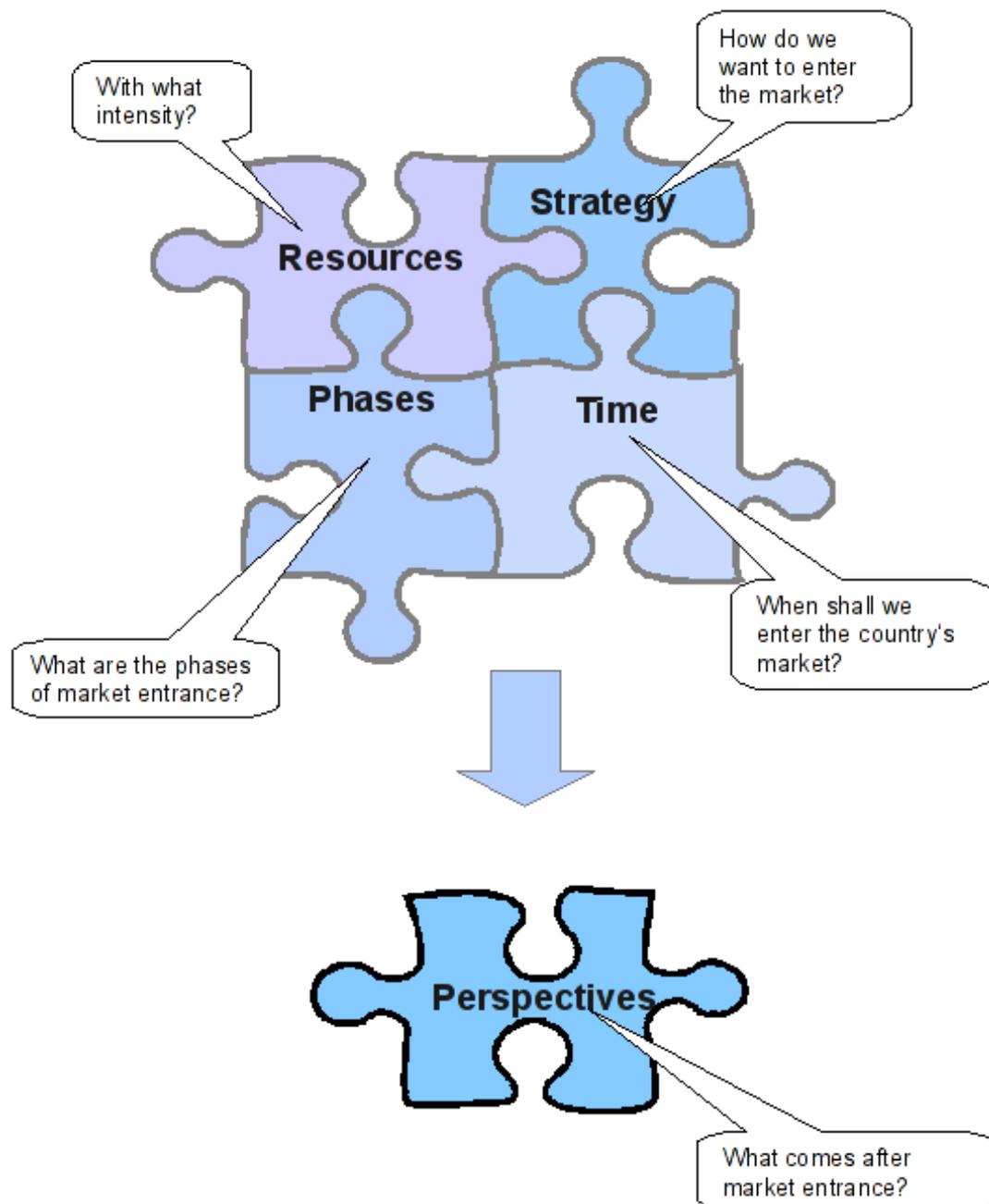


Diagram: Market entrance questions

5.4.2 Staff development for internationalisation

Staff development at the education organisation is vital to the success of internationalisation. This concerns above all the ability of the various groups of employees to deal with a wide range of tasks.

The checklist below gives a comprehensive overview of the skills requirements to be met in the individual stages of internationalisation projects and the competences needed to do so. Applying these to the target/performance comparison for the status of staff development enables the targeted and differentiated assessment of qualification requirements for the education organisation's employees.

Checklist:

Intercultural competence in international projects

Stage	Area of competence	Knowledge and abilities	Central questions
Project definition and project preparation	Individual competence: <ul style="list-style-type: none"> • Willingness to lean • Tolerance of ambiguity • Roll distance • Background information • Competence in foreign languages 	<ul style="list-style-type: none"> • Gathering information about the partner country, current developments, legal issues • Current political and economic issues; historical facts • Values and basic ethical orientation, symbols; considering the communication styles of the target cultures as relevant to cooperation • Making staff aware of their own cultural identity; examples of self-images and others' impressions; examples of critical incidents which have arisen in similar projects • Ability to use polite expressions in the foreign language • Ability to cope with uncertainty on how to behave in intercultural encounters 	<p>What are the communication styles of the target cultures participating?</p> <p>Do we/our partners have a specific company culture?</p> <p>What stereotypical images do we have of our partners/our partners have of us?</p> <p>How should I select information relevant to our project?</p> <p>How can I communicate this information to partners before the project begins?</p>
	Methodical competence/consideration of objectives: Preparing communication of project objectives, dealing with dissent Considering communication media and communication structures	<ul style="list-style-type: none"> • Consideration and creation of organisational structures in which the optimal exchange of information and best possible cooperation between all participating cultures is guaranteed • Considering semantics and the relevance of objectives in the participating cultures (binding nature and form of objectives, how long objectives are effective, rituals for agreeing objectives) • Considering how to deal with differing visions/objectives (agree to disagree; linking different objective systems) 	<p>How does project management work in the cultures involved?</p> <p>How well-prepared are our employees:</p> <ul style="list-style-type: none"> • for using the right communication mix • for dealing with partners from other cultures • for the emotional highs and lows of intercultural communication?
	Professional competence: Knowledge of management styles in the partner cultures	<ul style="list-style-type: none"> • Draw on existing professional experience and professional successes/failures in intercultural project work • Procure concrete information on the management styles of the partners cultures (project work in the partner cultures/decision-making processes/importance of hierarchies/passing on information and reciprocity, 	<p>How are decisions made in the participating partner organisations?</p> <p>What do our partners expect from us?</p> <p>What do our partners expect us to expect?</p>

Stage	Area of competence	Knowledge and abilities	Central questions
		importance of relationships etc.)	
	Process competence:	<ul style="list-style-type: none"> • Construction of an equal partnership before the first meeting • Considering and understanding the dynamics of intercultural processes 	
Project implementation	Individual competence: <ul style="list-style-type: none"> • Ambiguity tolerance • Basic optimistic attitude • Self-perception and ability to self-monitor • Openness to other cultural practices 	<ul style="list-style-type: none"> • Ability to cope with stressful and doubtful situations during cooperation • Coordination of intercultural projects • Ability to drive forward joint discussions on common rules for project work • Ensuring self-monitoring in intercultural situations 	Are there pronounced stereotypes on both sides which could surface in conflict situations?
	Methodical competence: <ul style="list-style-type: none"> • Ensuring optimal communication during cooperation • Agreeing rules for cooperation • Constantly reviewing and optimising the exchange of information 	<ul style="list-style-type: none"> • Negotiating objectives on an equal basis (symmetry) • Joint definition of critical milestones • Negotiating and committing to common project rules • Negotiating sanctions in the case of failure to adhere to the rules and poor performance in terms of objectives 	Is there power asymmetry? According to what criteria do our partners prioritise information? In what cases do our partners consider agreements binding? What does “binding” mean for our partners?
Project implementation	Professional competence: <ul style="list-style-type: none"> • Culture-specific information on communication style • Knowledge of the legal and economic conditions concerning joint project work • Awareness of the stereotypes one has oneself when dealing with partners 	<ul style="list-style-type: none"> • Ability to provide professional, legal and economic information • Ability to assess and also to relativise conditions one sets in terms of their cultural nature • True willingness to negotiate new conditions for the current project • Clear grasp of the importance an agreement has in the various different cultures • Ability to channel existing project experience into current project work 	What possible sanctions have been discussed and accepted in our intercultural project? How do we deal with contradictions? How can we deal with misunderstandings?

Stage	Area of competence	Knowledge and abilities	Central questions
	<p>Social competence:</p> <ul style="list-style-type: none"> • Communication appropriate to the situation • Ability to work in a team • Empathy and metacommunication skills • Tolerance • Intercultural conflict management 	<ul style="list-style-type: none"> • Knowledge of direct and indirect styles of communication • Ability to deliberately apply certain questioning techniques, appropriately and in accordance with the intercultural circumstances • Constant empathy • Ability to collate the results of talks and have them confirmed • Conscious metacommunication • Systematic use of culturally appropriate metacommunication • Awareness of speed/loudness/eye contact and other communication specifics • Ability not only to understand but also to accept different communication styles • Acceptance of conflicts as such • Ability to accept different viewpoints and work together to find solutions for the project • Constructive approach to working in different time zones 	<p>Have we reached a clear understanding with our partners at a meta level on:</p> <ul style="list-style-type: none"> • Communication style • Documentation • Appropriate questions • Appropriate feedback?
	<p>Process competence:</p> <ul style="list-style-type: none"> • Flexibility • Initiative • Willingness constantly to reflect on the process at a meta level • Able and aim to recognise potential synergies • Negotiation of useful synergies between one's own demands and those of a foreign culture 	<ul style="list-style-type: none"> • Clear understanding of the process dynamics of intercultural project management • Ability and willingness to act according to the situation • Constant willingness to maintain common communication • Willingness to follow new and unusual approaches • Basic knowledge of synergetics • Ability to recognise and realise potential synergies in intercultural encounters 	<p>Have we agreed rules governing our cooperation?</p> <p>Do we have a clear and detailed concept of synergy/synergy management</p> <p>How can we metacommunicate appropriately?</p> <p>Are we able to speak frankly to each other?</p> <p>What does "frank" mean for our partners from other cultures?</p>
Project controlling	Willingness to take part in an honest and constructive evaluation	<ul style="list-style-type: none"> • Defining evaluation as an integral part of the project • Joint consideration of how to deal with critical results • Joint definition of quantitative and qualitative evaluation 	Should the evaluation of the project highlight the positive and gloss over the negative?

5 Aids for implementation: sub-process and process element quality requirements in the internationalisation of education organisations

Stage	Area of competence	Knowledge and abilities	Central questions
		criteria and methods <ul style="list-style-type: none"> • Joint definition of parameters critical for success • Joint definition of specific times at which the project is to be evaluated • Joint definition of how the evaluation results are to be communicated within the project • Evaluation in line with sustainability considerations 	Would a frank evaluation be useful? Is a frank evaluation in this intercultural context actually desirable or useful? Is a frank evaluation possible?

5.4.3 Central questions on the provision of education services and products in line with foreign customers' requirements

The following questions are aimed at further differentiating customer potential, clearly defining the services offered by the education organisation and tailoring these more precisely to customer requirements:

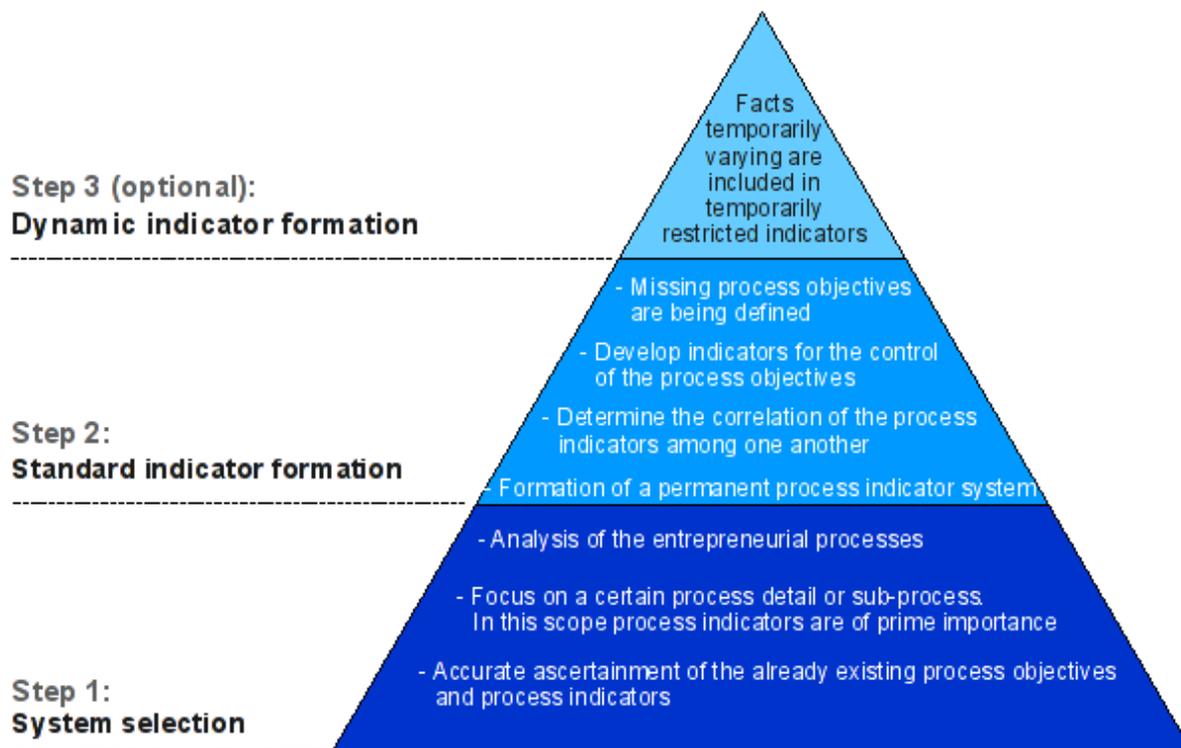
Overview: Questions on customer segmentation according to purchasing behaviour
(according to: iMove - Checklist – Internationalisation of education services, Version 6/2006)

- Who purchases these concrete education services?
- Who does not purchase the education services?
- What is the value of the service and products on offer?
- What problems does the range of products and services solve?
- What education services which we could provide are potential customers currently purchasing from other providers?
- What price are they paying for these services?
- From whom are education services being purchased?
- When are the products and services purchased?
- Why are the products and services purchased?

5.5 Aids for implementation: examining results

5.5.1 Key figures and indicator systems for educational institutions

Method for the formation of process indicators



Source: Orze I, Diploma Thesis: *Earbeitung einer Methodik für die effiziente Ermittlung von Prozesskennzahlen am Beispiel des Daimler Chrysler Konzerns im Werk Düsseldorf (Nutzfahrzeugsparte)*, BU Wuppertal, 2004

Overview: Standard key figures and dynamic key figures for education institutions:

Standard key figures (s) and “dynamic (d)” key figures for education institutions include data on

Resources

- Material and financial resources (s)
- Number and size of the branches (s)
- Know-how and personnel resources
- Number and percentage of teaching and other staff (including freelance lecturers) (s)
- Number of employees with business, with intercultural and with foreign language competence (d)
- Current institution and scheme certification (s)

Participants

- Number of participants with no qualifications (s)
- Number of participants with general qualifications (s)
- Number of participants with a professional qualification (vocational qualification/degree) (s)
- Percentage of participants per education field and age group (s)
- Supply/demand ratio (s)
- Recently concluded qualification/training contracts (in total, by education field and age group) (s)
- Mobility (How far will potential customers travel in order to use an education service?) (d)
- Total number of foreign participants across all the institution’s qualification schemes (d)
- Percentage of foreign participants by country/region of origin and education field (d)

Education process

Input

- Scope and structure of the range of education services and products (d)
- Material provided per participant (d)

Process

- Percentage of traditional seminars (d)
- Percentage of events using new forms of learning (such as online learning etc.) (d)
- Percentage of coaching and other support processes in the overall range (d)
- Number of learning venues other than the seminar rooms (d)
- Number of learning processes involved (d)
- Number of hours taught (s)
- Number of hours taught per type of learning (lesson/learning support hours) (d)
- Number of participants per class (s)
- Number of certificates and educational consultancy services compared to the institution's complete product and service range (d)
- Percentage of products which are exports (qualification schemes, certification, educational consultancy services) (d)

Output

- Success rate in completing the qualification schemes (s)
- Number and percentage of recognised qualifications, certificates from regional or industry certification bodies, the institution's own qualifications or partial qualifications (s)
- Competences acquired (credit points etc.) (d)
- Drop-out rate (s)

Overview: Standard key figures (s) and “dynamic (d)” key figures for education institutions¹⁸:

Requirement groups Quality Guidelines	Proposed indicators
1.1 Strategic development	<ul style="list-style-type: none"> • Absolute market share = own market share x 100 ./ market volume = x% (s) • Relative market share = own market share x 100 ./ market share of the biggest competitor = x% (s)
1.3 Corporate and quality objectives	<ul style="list-style-type: none"> • Economic efficiency = return (performance) x 100 ./ outlay (cost) = x% (s) • Placement rate = number of participants placed x 100 ./ total number of participants = x% (s) • Drop-out rate = number of drop-outs x 100 ./ total number of participants = x% (s)
1.4 Corporate planning	<ul style="list-style-type: none"> • Market growth = additional market volume x 100 ./ market volume of the previous period = x% (s) • Order backlog = orders on hand x 100 ./ turnover in the past 12 months ./ 360 (s) • Regional share = own turnover in the region ./ total turnover in the region (s)
1.6 Resourcing	<ul style="list-style-type: none"> • <u>Know how and personal resources</u> • Number and percentage of teaching and other staff (including freelance lecturers) (s) • Age distribution = age group x 100 ./ total number of employees = x% (can also be used for gender) (s) • Ratio of female to male employees (s) • Absence distribution = Absentees by cause x 100 ./ total number of employees = x% (s) • Further training costs per employee = further training costs ./ number of all employees (s) • Average number of working hours per week = total number of working hours ./ number of persons employed (numerator can be varied by illness, holidays, accident ...) (s) • Share of employees with entrepreneurial, intercultural and/or foreign language skills compared with the total number of employees (d) • Share of training courses for Internet applications = number of Internet training courses ./ total number of training courses (reference can also be made here to sub-sections) (d) • Existing certifications of the organization and courses (s) • <u>Material and financial resources</u> • Number and size of facilities (branches) (s) • Room utilization = rooms occupied x 100 ./ total number of rooms = x% (s) • Equipment utilization = equipment used x 100 ./ existing equipment = x% (s)
1.9 Cost control	<ul style="list-style-type: none"> • Percentage of working hours lost = working hours lost x 100 ./ required working hours = x % (s) • Average personnel expenditure = total personnel

¹⁸ When forming process indicators, you should remember that the definition of dynamic Indicators is heavily dependent on the education organisation in question.

Requirement groups Quality Guidelines	Proposed indicators
	<p>expenditure \cdot average number of employees in the period (s)</p> <ul style="list-style-type: none"> • Performance per employee = revenues \cdot average number of employees in the period (s) • Contribution margin: revenues from the product in the accounting period - variable costs of the product in the accounting period = contribution margin (s)
2.1.2 Staff satisfaction	<ul style="list-style-type: none"> • Staff turnover figure = attrition of workforce x 100 \cdot Average number of employees = x% (s)
2.1.8 Systematic personnel development	<ul style="list-style-type: none"> • Personnel expenditure rate = personnel expenditure \cdot overall performance (s) • Personnel expenditure structure = personnel expenditure for ... x 100 \cdot total personnel expenditure = x% (s) • Level of employment = actual level of employment x 100 \cdot planned level of employment = x% (s) • Wage ratio = personnel costs \cdot turnover (s) • Percentage of personnel dialogues = number of employees with whom a dialogue has been conducted \cdot total number of employees (s) • Participation rate in conferences, seminars, further training courses = number of employees who have participated in conferences, etc \cdot total number of employees (s) • Sickness rate = number of people sick x 100 \cdot total number of employees = x% (s)
2.3.2 Teaching staff participation in projects	<ul style="list-style-type: none"> • New customer appointments per employee = number of new customer appointments \cdot total number of new customer appointments (s) • Number of product ideas proposed by employees (d)
2.3.3 Building up of networks	<ul style="list-style-type: none"> • Contacts with EU = number of contacts with EU in period 1 \cdot number of contacts in period 2 (d) • Contacts in transnational projects = number of contacts in Period 1 / Number of contacts in Period 2 (d)
3.1.1 Educational requirements	<ul style="list-style-type: none"> • Market growth = additional market volume x 100 \cdot market volume of the previous period = x% (s) • Number of foreign participants in training schemes as a whole (s) • Number of foreign participants in certain courses (d) • Number of foreign participants by country of origin (d) • Number of participants categorized by school leaving qualifications related to certain courses (d) • Age distribution of the participants in training schemes (s) • Supply demand relations (s) • Training contracts concluded newly (total as well as distinguished in education areas and age groups) (s)
3.1.3 Customer satisfaction	<ul style="list-style-type: none"> • Claims rate = number of claims x 100 \cdot number of products on offer = x% (s) • Carrying out of customer surveys in a period (d) • Analysis of customer surveys in a period (d)
3.2.1 Advice on educational	<ul style="list-style-type: none"> • Time required to advise participants on educational offers –

Requirement groups Quality Guidelines	Proposed indicators
offers	recording of averages (d)
3.2.2 Learning-related advice	<ul style="list-style-type: none"> • Interval and time expended for the provision of individual learning-related advice
3.3.2 Requirements of education offers	<ul style="list-style-type: none"> • Comparison of the substance and time scales of educational offers in a period (d) • Percentage of traditional seminars related to the overall offer (d) • Percentage of lectures / seminars involving the use of new forms of learning related to the overall offer (d) • Share of coaching and other processes of accompanying learners in all educational offers (d) • Share of education advisory services, certifications and other services in the complete supply of the educational service provider (d) • Share of studying places outside the seminar rooms (d) • Share of processes of learning in the work (d) • Taught hours per studying form (lessons / accompanying learners) (d) • Number of participants per educational offer (d)
3.6.2 Success assessment	<ul style="list-style-type: none"> • Success rate at the completion of the training measures (s) • Number and percentage of recognised qualifications, certificates of regional or sectoral (s)
4.1 Monitoring, audits and lists of results	<ul style="list-style-type: none"> • Number and percentage of internationally oriented certificates obtained (d) • Share of export performances related to the overall offer (courses, consultations, certifications) (d)
4.6 Error correction and prevention	<ul style="list-style-type: none"> • Analysis of error corrections from an error matrix

5.5.2 Aid for examining the suitability of the quality management system developed by the education organisation

Overview: Internal assessment criteria: degree of implementation of the education organisation's internationalisation

Criterion	Level of implementation in the QM system
a) Status	Does the status of preparations, implementation and extension of the quality management system meet expectations?
b) Scope	Has the physical and/or sectoral scope of the quality management system been established? (Is it an isolated application, a regional quality management system, a sector or field-specific or interdisciplinary quality management system?)
c) Structure in line with internationalisation	Does the QM system meet the requirements of the internationalisation of the education organisation? Is it suited to the initiation and implementation of transnational education processes ? Does it promote the penetration of education markets abroad? Will it help secure the sustainability of internationalisation?
d) Certification	Can a certificate be acquired with the help of the quality management system? What kind of certificate?
e) Record of relevant processes	Have processes relevant to the quality of service provision (e.g. lesson preparation, management processes etc.) been recorded? How thoroughly?
f) Degree of integration of various different quality approaches	To what extent have the three aspects of quality management – product quality, process quality and potential quality – been established and linked?
g) Specificity to subject	To what extent does quality management meet the requirements of professional development , a special area of service provision? Does it take account of educational quality as a specific quality dimension?
h) Customer focus	Does the quality management system make it possible to assess the degree to which the service is customer-oriented? Are there specific customer-specific quality criteria (e.g. concerning transparency for customers, customers' rights to lodge complaints etc.)?
i) Participation	What rights do the education organisation to be evaluated, its employees and its customers have to determine or contribute to content and structure ? (Are the "subjects" of work on quality also the "actors"?)
j) Operationalisation	To what extent are the objectives of quality management supported by an extensive range of tasks and responsibilities?
k) Measuring tools	What measuring tools does the quality management system use? (e.g. lists of indicators, customer satisfaction questionnaires, ex-post assessment tools and/or quality measurements during the course of the process, lecturer self-assessment, evaluation of the lessons and lectures by the education institution etc.) How are the lists of indicators used to measure any discrepancy between targets and performance obtained? Do they fulfil the requirements of comprehensive quality management which meet all three factors listed in f)? Do they allow you to reach findings which can be evaluated to ensure sustainable quality management?

Criterion	Level of implementation in the QM system
l) Documentation	How extensively and in what manner is the quality management system in question documented? How complicated are the documentation processes involved in the application of this system?
m) Results focus	Examination of the transparency of the system, its appropriateness in view of the education organisation's development objectives and the extent to which the quality management objectives and resources correspond .
n) Clarity	To what extent does the quality management system provide clear guidance for logical and consistent action in quality management?
o) Applicability/Flexibility	To what extent can the quality management system be applied to different users ? What potential options are there to extend its scope? What would be the cost involved in adapting the system in question?
p) Costs	How high are the costs incurred (including any follow-up costs) for the users of the quality management system? Is the necessary financial outlay presented to the user transparently ?
q) Effects of quality activities	Does the use of the quality management system lead to real progress in the organisation's work on quality or are the activities carried out in this area largely without results? Do only small areas change, for example the company organisation, or is there actual progress in service provision? (Does the application of the quality management system lead to a real improvement in the quality of teaching and learning?)
r) Options for improvement	To what extent is the quality management system designed from the very beginning to allow for further changes or at least for improvements ?
s) European standards	To what extent does the quality management system in question make the services comparable with those of the education organisations in other countries? To what extent does it meet European and international standards and recommendations?

6 Implementation assistance for the individual requirements of the QUALITY GUIDELINES

The QUALITY GUIDELINES are an expansion of the QM STAGE-MODEL laid down in PAS 1037:2004. In the matrix on the following pages they systematically follow the structure of this standard with its total of over 70 requirement groups organized into four main categories:

1. Managing and developing educational organization;
2. Providing and developing staff members, teaching staff and learning infrastructure;
3. Conceiving, implementing and evaluating educational offers; and
4. Measuring, analysing and improving education processes.

These main requirements categories also correspond to the four main processes on which the QM STAGE-MODEL is based.

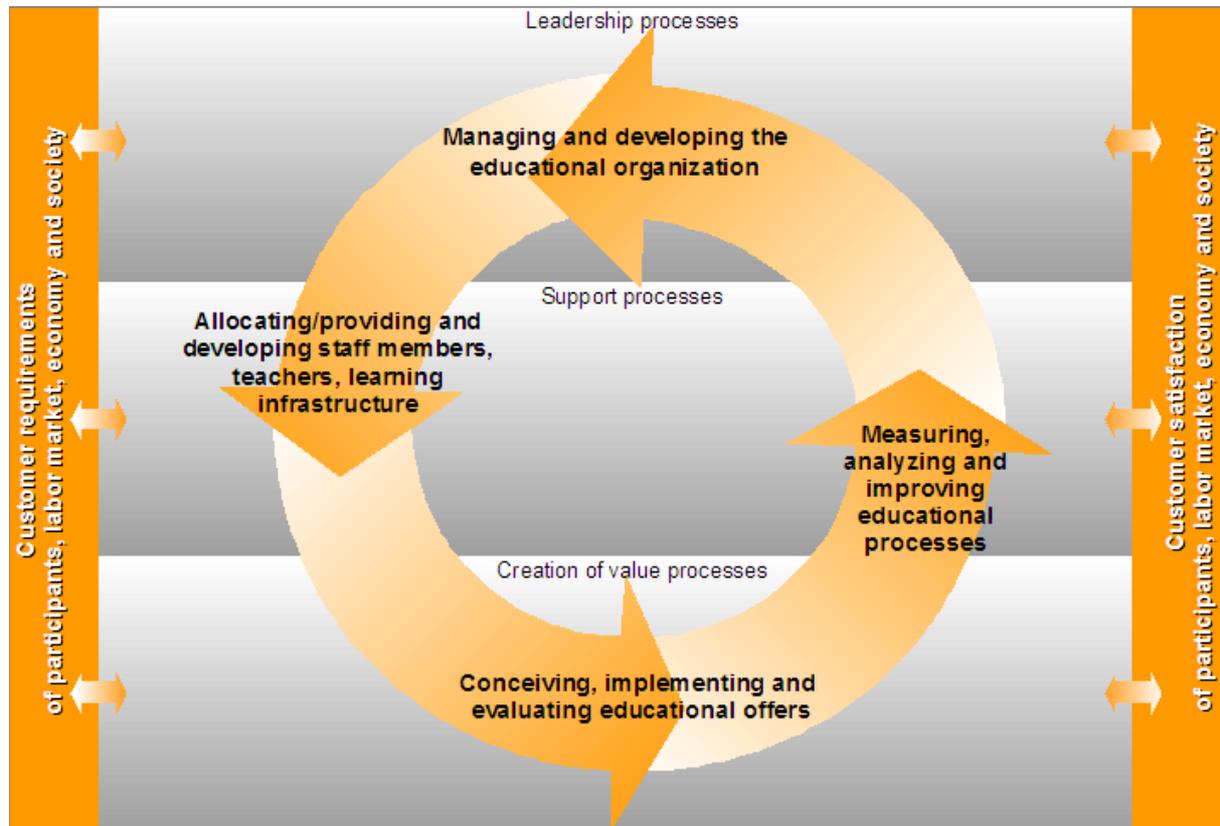
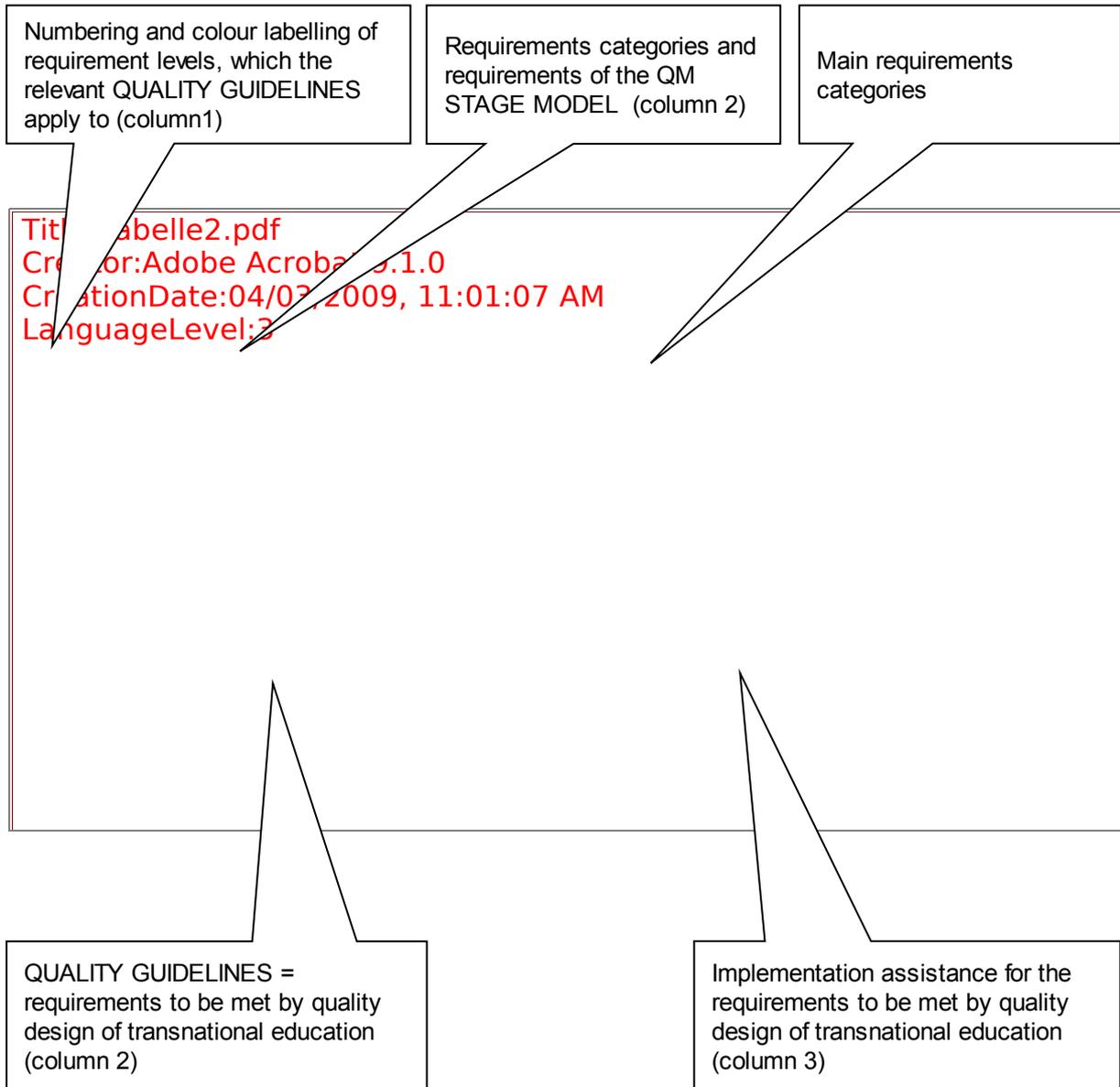


Fig.: Model of a process-oriented Quality Management System complying with the QM STAGE-MODEL

The following matrix illustrates the requirement groups and requirements of the QM STAGE-MODEL in the upper part of the 2nd column.¹⁹ This includes the QUALITY GUIDELINES in the 2nd column, i.e. the requirements on the quality orientated design of transnational education are directly allocated to the relevant requirements of the QM STAGE-MODEL. In the 3rd column the implementation aids for the quality oriented design of transnational education for each requirement group explain what needs to be done and taken into account in order to introduce the QUALITY GUIDELINES and improve them.

¹⁹ According to PAS 1037, the requirements of the QM STAGE-MODEL written in italics are to be implemented if they are applicable. These requirements do not have to be fulfilled for a certification according to PAS 1037.



The definition of basic, standard and excellence levels as well as their allocation to the individual requirement groups in the QM STAGE-MODEL has been kept unchanged (column 1). It is labelled in colour which requirement stages the QUALITY GUIDELINES apply to. Light grey means basic level, dark grey standard level and orange excellence level.

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
1	Managing and developing the educational organization	
1.1	<p>Strategy development and its regular assessment</p> <p>Document strategy Specify updating rhythm Record assessments</p> <ul style="list-style-type: none"> • Define clear, verifiable objectives in internationalizing the organization, making sure that these objectives correspond to individual forms of transnational education services • Develop the strategies for these different forms of transnational education services in a joint adjustment process, making sure that the strategy is developed jointly in the case of international co-operation arrangements (common objectives) • Define spheres of competence • Make operational processes and documents regarding your international engagement transparent and available to your international partners 	<p>A documentation of the strategy for internationalizing the education organization defines the expected benefit, for example with regard to</p> <ul style="list-style-type: none"> • development of new target groups • improvement of own know-how and • use of synergies from transnational co-operation, division of labour, and exchange. <p>Document the result in a separate strategy paper, revise and update it in regular intervals. Document this process in protocols.</p> <p>The definition of the objectives must be made as clear as possible in a way that they can be assigned to the individual forms of the transnational education services, such as</p> <ul style="list-style-type: none"> • export of education as cross-border service • domestically offered education services for residents of other countries • education service provided locally abroad by teaching staff of the despatching country or local staff • international educational co-operation abroad • international cross-border education co-operation <p>This must ensure the operationalizability of the objectives in the interest of the quality-based implementation of transnational educational activities.</p> <p>Include all concerned employees in the development of the strategy for internationalizing the organization.</p> <p>With regard to forms of international co-operation including a joint strategy development it is crucial that all partners are actively included in the search for solutions and identify themselves with the results of the development process.</p>
1.2	<p>Guiding principle and quality policy</p> <p>Up-to-date documents on the educational organization's customer-oriented guiding principle and its quality policy</p> <ul style="list-style-type: none"> • Make internationalization of the organization as part of the guiding principle with particular attention to the development 	<p>The documentation of intercultural competences as components of the customer-oriented guiding principle of the education organization particularly includes such general competences referring to</p> <ul style="list-style-type: none"> • knowledge of foreign languages • basic understanding of own and foreign cultures

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
	<p>of intercultural competences and gender-specific objectives</p> <ul style="list-style-type: none"> • Seeing cultural diversity as having the potential for synergy and managing it accordingly; • Make guiding principle and quality policy publicly available • Develop quality policy in the field of vocational basic and advanced training, taking account of European educational criteria and standards 	<ul style="list-style-type: none"> • communication and acting in intercultural situations, and • intercultural negotiations and conflict solving. <p>The documentation of the guiding principle and the quality policy of the education organization should also reveal the manner in which the following global processes are taken account of:</p> <ul style="list-style-type: none"> • increasing knowledge orientation of work and participation in social life • increasing dominance of problem solution processes • increasing personal responsibility of the individual with rapidly changing requirements • increasing necessity of self control and self organization • condensation of work and the increasing selection according to performance. <p>When representing gender-specific objectives of the organization point out to what extent the guiding principle takes account of the different social and cultural determinacy of women's and men's role behaviour in the various target countries and/or regions. Show to what extent the focus is on the individual performance of the female or male potential customer of the education organization and not on the satisfaction of established biologicistic, gender-related and gender-discriminating approaches. However, this is to be realized with a view of the ability of the partners in the target countries to support this approach.</p>
1.3	<p>Business and quality objectives</p> <p>Document objectives in a precise and verifiable manner</p> <p>Record actual implementation of improvement projects for each fiscal year</p> <p>Determine specified measurable and verifiable objectives for the individual areas, seeing to it that there is a direct relation to the quality policy</p> <ul style="list-style-type: none"> • Develop quality indicators for transnational cooperation • Take account of international objectives for vocational basic and advanced training in setting company and quality objectives, as developed, for example, by the European 	<p>The quality characteristic figures to be applied for revision or development of the quality objectives must include the quality of the education result (output and outcome quality) and also important process quality aspects and aspects of the quality of the conditions of learning and qualification processes (potential quality).</p> <p>The description of competences to be acquired or to be reinforced has central significance. To review the achievement of objectives the use of competence grids has proven successful in this context.</p> <p>When taking account of European objectives for vocational basic and advanced training, the main focus should be placed on the European Qualifications Framework (EQF) and its implementation on the relevant national level as National Qualifications Framework (NQF) (e.g. German Qualifications Framework (GQF)).</p> <p>Gender-specific indicators to be taken account of in this process particularly refer to the</p>

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
	Union <ul style="list-style-type: none"> Adapt company and quality objectives to international educational requirements and ensure their verifiability with the aid of characteristic figures 	dissolution of traditional gender-role images and stereotypes (compatibility of family and advanced training, transition of girls and women to employment after basic and/or advanced training, etc.) In parallel to the identification of specific quality objectives for internationalizing the education organization, identify and document in writing personal responsibilities of senior staff members and employees for realizing quality objectives.
1.4	Business planning Determine the development of the demand placed by the educational and labour markets Identify planning related to the respective business areas (educational offers, turnover, cost effectiveness and solvency) <i>Present life cycles (market cycles) for the most important educational products</i> <ul style="list-style-type: none"> The objectives pursued, viz. <ul style="list-style-type: none"> internationalization of the organization, strategically oriented opening up of international markets, and setting up of international co-operation arrangements must be appropriately documented with regard to market surveys, the planning of the business segments (especially from the point of view of cost-effectiveness), and the product life cycles Remember the need for close co-ordination with international partners Ensure the transnational education services offered accord with the relevant national legislation as well as with international norms and customs Appropriate participation by men and women in international cooperation 	The identification of the development of the demand placed by the educational and labour market should include the examination of <ul style="list-style-type: none"> current demand trends regarding the forms of education (“traditional” seminars, group learning, telemedia-based learning, distance learning, self-organized but accompanied learning, etc.) national education traditions specific admission conditions for potential customers of education measures and for education organizations themselves, and financing conditions. Within the scope of the objectives of the internationalization of the education organization, aim, to the extent possible, at offering complete services, which, in addition to the educational opportunities, include in particular the organization of the basic conditions for the learners (if necessary accommodation, financing and visa issues, etc.). This corresponds to an important current trend in the international education export and is considered as a key factor of the market success of education providers on international markets. The efforts of the building organization to realize transnational education services are supported by the interconnection with other education providers . The creation of a corresponding “export network” allows to efficiently solve key market cultivation problems (from market observation to occupation of suitable market segments) which frequently could not be handled by one solitary education organization. Of equal importance is the co-operation with external marketing agencies in the target country for securing of a comprehensive marketing and the establishment of co-operation relationships with local education organizations. In particular the "Twinning Arrangement" – a partnership between organizations with offers complementing and enhancing each other, has proven successful as success factor on international education markets.

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1.5	<p>Organizational and operational structure, including business areas and co-operations</p> <p>Illustrate organization (e.g. organization chart, job description, function matrix, rules of work, identification of and interaction between business processes)</p> <p>Ensure participation of staff members (e.g. specify areas of responsibility)</p> <p>Name stakeholders and co-operation partners</p> <ul style="list-style-type: none"> • Specify exactly the areas of responsibility involved in internationalizing the organization • Adapt the organizational structure to the requirements of transnational education services • Reaching agreement on rules governing intercultural team work for the transnational education project 	<p>For adaptation of the organizational structure of the education organization to the requirements of transnational education service providers observe</p> <ul style="list-style-type: none"> • the geographic orientation of the internationalization efforts (region, target country/target countries) • the thematic contents of the education services to be offered • the type of the services (courses, curricula, consulting services, coaching, etc.), and • the ways of transfer of education services. <p>For illustration of the organization of the creation of services, take particular account of the impact of these factors on</p> <ul style="list-style-type: none"> • project management (including human resource and change management) • market observation • contract management • management of legal issues (compliance with labour issues regarding foreign deployments, etc.) • tender management, bid preparation • cost management <p>Take account of the management of interdependent risks and intercultural differences when agreeing and identifying rules for an intercultural teamwork for the transnational education project.</p>
1.6	<p>Provision of resources</p> <p>Define requirements for resources, provide and maintain resources (e. g. personnel, infrastructure, working and learning environments) in a way specific to the respective business areas and objective groups</p> <ul style="list-style-type: none"> • Define the requisite resources in accordance with international education requirements and international standards of professional education • Plan resources for the internationalization of the organization with due regard for the peculiar features of return on investment in international business 	<p>The provision of resources required to take account of international education needs and international vocational training standards must reflect the internationalization strategy of the education organization.</p> <p>In this context, take account of the close context between scope and structure of the resources on the one hand and the diversification possibilities of the services offered by the organization according to the target regions, fields of business and target groups on the other hand.</p> <p>The key resources in the field of education are immaterial. Also include the existence and the occurrence of such immaterial resources, such as specific core competences, product, specialized, and leadership knowledge, and the product reputation of key educational opportunities of the organization, but also industrial property rights, etc. in</p>

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	<ul style="list-style-type: none"> • Taking account of the problem of gender in planning resources, especially with regard to cross-border mobility requirements and differences in the assignment of female teaching staff 	<p>the decision on the use of resources.</p> <p>In the process of internationalization of the education organization, it should be considered to enter co-operation relationships allowing combination and mutual utilization of the resources of several partners for mutual benefit.</p>
1.7	<p>Availability of documents and data Make valid documents and data available to the people concerned</p> <ul style="list-style-type: none"> • Provide documents and data in the languages of the participating countries or in the common language agreed on • Ensure the requisite data is available in the various international locations. State-of-the-art communication and documentation platforms should be set up for the purpose • Provide quality-related documents and data also for the teaching and other staff who are responsible for implementing the education process in the various international locations 	<p>When providing the employees with quality-relevant documents and data, ensure that the selected data comprise statements relevant for action and control and motivating to perform. This may require establishment of indicators on the basis of the existing data material with a significance complying with the objectives and tasks of the quality management.</p> <p>When ensuring the availability of the required data in the various sites, take account of any differing data protection regulations and mandatory retention periods of tax and business law relevant documents abroad.</p> <p>Use of suitable communication means (internet) for provision of data</p> <p>The requirements regarding the documentation of the quality management system are explained in chapter 4.4 in detail.</p>
1.8	<p>Information and communication within the business Arrange processes of formal communication (e. g. business and project meetings and the like); record results, monitor implementation Promote informal communication</p> <ul style="list-style-type: none"> • Providing media and facilities for open cross-border and cross-cultural informal communication • Regulate formal communication and adapt it to international standards • Taking appropriate account of the culture of the target country and the different styles of communication in promoting formal and informal communication 	<p>Within the scope of the internationalization of the education services the adaptation of the communication culture to the requirements of transnational co-operation is imperative for the organization. The adequate consideration of the culture of the target country and the various communication styles of transnational partners require</p> <ul style="list-style-type: none"> • intercultural awareness (including understanding for potential misunderstandings and problem areas of intercultural co-operations) • intercultural sensitivity (mainly the intention to perceive the cultural differences in the co-operation, to accept them, and to generally consider them positive – as productive momentum of the co-operation) • intercultural integration capability (readiness for effective dialogue and for exchange, conflict resolution ability, ability to deliver adequate behaviour and cultural integration measures when dealing with each other, etc.).

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1.9	<p>Controlling</p> <p>Introduce and maintain controlling system on the basis of indicators and characteristic figures that are related to business management and educational processes</p> <p>Record data on the educational market with regard to contents, extent, duration, costs, mediation- and application-related results</p> <ul style="list-style-type: none"> • Agree on joint indicators and characteristic figures for co-operation, with due regard for national and international reporting obligations • Develop a specific controlling system for international co-operation • Institutionalizing permanent and open process reflection as a desirable component of cooperation 	<p>When agreeing on joint indicators and characteristic figures for the co-operation economic and education process related results are of equal importance.</p> <p>Hence, in addition to such characteristic figures, particularly referring to numbers of participants, market shares, sales, viability, etc., also indicators, such as results of learning success checks, participant satisfaction and satisfaction of the management with the economic results of the education export should be applied and immediately education process related criteria be used (evaluation of objectives and conditions, procedures, and influence factors of the teaching and learning processes). Within the scope of the evaluation of the education process, particular attention should be paid to overcoming at least initially existing language barriers and intercultural problems.</p> <p>When selecting data for observation of the education market, ensure that, where possible, it does not provide a mere summation of the current market situation, objectives, and offers of competitors, but shows developments in their course, tendencies, and trends.</p>
1.10	<p>Co-operation and networks</p> <p>Systematically develop co-operation and networks with business, common interest groups, and other educational organizations and customers</p> <ul style="list-style-type: none"> • Take account of the specific conditions and requirements of transnational co-operation • Ensure continuous co-operation with international co-operation in international co-operation and network development • Define the rights and duties of the participating partners in contracts between them on a legally binding basis 	<p>Particularly in transnational co-operation processes, the success of the joint work depends on the extent to which an agreement is reached between the interests and intents of the partners.</p> <p>Hence, it should be ensured that</p> <ul style="list-style-type: none"> • realistic outlooks exist, a “win-win situation“ is achieved that satisfies all partners • verifiable synergies are created • the action of the immediate actors is always transparent for all co-operation partners and is legitimized by them • the partners are aware of their interest in contributing the resources required to achieve the objectives to the co-operation process, and are willing to do so • the communication culture of the partners takes into account the conditions for intercultural co-operation. <p>For co-operation in networks consider their specifics regarding controllability, openness of results, stability of relationships, etc. The same applies to establishing strategic alliances.</p> <p>Hence, establishment and maintenance of contacts with local and transnational partners</p>

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		<p>of the education organization require particular attention.</p> <p>Co-operation relationships with established partners within the scope of service chains, associations, etc. should be governed by a contract.</p> <p>Potential partners should be assigned in form of a practical orientation and the objectives of the interconnection with those partners should be secured, continuously reviewed and adapted to changing requirements, if required.</p>
1.11	<p>Management review of the organization</p> <p>Provide evidence of a documented and regular (at least yearly) management review by means of a defined procedure of information gathering, implementation and interpretation</p> <ul style="list-style-type: none"> Define international procedures for management reviews of the organization 	<p>When defining international procedures for management evaluation of the education organization, also take account of the cultural conditions of the partner country and/or the partner countries and possible legal consequences (relating to the law governing human resources, information, etc.) with regard to form and content of the evaluation. Likewise, take account of gender-related specifics.</p>
1.12	<p>Responsibility for QMS</p> <p>Ensure management's responsibility (this responsibility may be delegated to a senior staff member of the organization)</p> <ul style="list-style-type: none"> Ensure that the requisite Quality Assurance mechanisms are provided locally (abroad) where the education services are being provided 	<p>Ensuring the practicability of requisite Quality Assurance mechanisms at the location abroad where the education services are provided also implies ensuring that they are accepted by the foreign associates, partners and also customers, if applicable.</p> <p>Therefore explain meaning, use, mechanism of the applied quality management system (QMS) to foreign partners.</p> <p>Co-operation partners should use Identical/similar Quality Assurance measures.</p> <p>If there is already an QMS in place at the institution, the person in charge should dispose of the intercultural competences required for the system. Otherwise a person should be assigned who disposes of the intercultural competences. This person should ensure the application of the Quality Assurance system in co-operating enterprises and subsidiaries.</p>
1.13	<p>Senior staff members' exemplary effect</p> <p>The active design of vision, mission and value-positing is recorded</p> <p>Senior staff members promote learning processes in a demonstrably systematic manner</p> <ul style="list-style-type: none"> Exemplary effect of senior staff members in translating the vision of internationalization into concrete entrepreneurial 	<p>The exemplary effect of senior staff members in translating the vision of internationalization should in particular also refer to the factors of intercultural awareness, intercultural sensitivity, and ability for intercultural integration set out in 1.8, of which there must be evidence.</p> <p>Culturally established expectations of foreign partners and/or employees with regard to leadership role, leadership style, and exemplary effect of senior staff members should be understood and taken account of in a suitable manner.</p>

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	action and respect intercultural requirements and principles <ul style="list-style-type: none"> Senior staff members must set an example of interculturality in the company 	
1.14	Participation in the development and improvement of the management system Provide evidence of function plans and practical examples of personal activities <ul style="list-style-type: none"> Evaluate transnational experience with staff on the basis of the company's own QMS; be open to partners' experience in designing your own QMS Reflecting the cultural differences in the perception of power, authority and leadership in connection with open communications between those concerned 	Use advantages of transnational co-operation consciously for further development and improvement of the management system. By integrating foreign partners and/or employees in this process eventual conflict lines in the progress of the co-operation can be recognized in advance and a joint understanding of the objectives and tasks of the organization can be gradually developed. At the same time it becomes possible to integrate eventually new, progressive views and, due to the knowledge of complexity and variety of options gathered in such way, to increase the flexibility of the organization when reacting on new market requirements. Last but not least, the transnational co-operation allows identification of proven and generalizable aspects, aspects transferable to new conditions and application areas – and thus of an important resource for further internationalization of the education organization, during the further development and improvement of the management system.
1.15	Communication with stakeholders Identify stakeholders, specify communication regulations and media <ul style="list-style-type: none"> Take account of communication culture of foreign stakeholders Signal acceptance of their cultural identity and way of life 	Regarding the communication with foreign stakeholders it is important to take account of country-specific forms of cultural dimensions, such as <ul style="list-style-type: none"> high power distance vs. lower power distance polychronism vs. monochronism individualism vs. collectivism masculinity vs. femininity willingness to take risks vs. uncertainty avoidance (particularly level of use of rules and standards, rituals, and established doctrines in order to avoid uncertain situations). Hence, verifiable acquisition of ready-to-use knowledge regarding the specific communication culture of the relevant foreign partners is an indispensable part of the target-oriented preparation of successful transnational communication processes. A further implementation aid is the RKW guide: "Train the Intercultural Trainer".

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1.16	Motivation, support and appreciation of the staff members Ensure appropriate moral and material incentives (e.g. management by objectives)	An appreciation culture systematically honouring outstanding performances of the employees according to transparent criteria and rules should be developed, of which there must be evidence. This shall ensure equal treatment of employees with regard to motivation, support, and appreciation. As regards the forms of appreciation of foreign employees' performances, take account of applicable traditions and customs of the relevant country in an appropriate manner.
	<ul style="list-style-type: none"> Take account of special requirements of transnational mobility and intercultural competence, including employees' knowledge of foreign languages 	
1.17	Identification and design of strategic key processes Provide evidence of a concrete designation of key processes (e.g. SWOT analyses) as well as examples of successful strategic key processes	Plan and show concrete steps <ul style="list-style-type: none"> to gain international experiences and ideas, and to ensure an exchange of experience with transnational partners so as to identify and shape strategic key processes.
	<ul style="list-style-type: none"> Ensure an exchange of experience between the partners to the international education co-operation so as to identify and shape key processes Take account of European educational strategies Joint reflection on the peculiarities of learning and education processes and the challenges and opportunities they entail for the current project Reflection and training of an interculturally appropriate and target group related didactic 	
2	Allocating/providing and developing staff members, teachers, learning infrastructure	
2.1	Developing personnel (staff members and teachers)	
2.1.1	Development of competences Show an orderly requirement structure (e.g. competence matrix), including development-related objectives for the staff members and teachers	Development of competences and ensuring transnational mobility of the individual involved employees must take place according to plan, of which there must be evidence, and comply with the strategic objectives of the education organization. An important premise for this are precise ideas concerning the field of competence of the individual associates within the scope of the internationalization of the education organization. At the same time ensure that the intended measures for development of competences are practically realizable, financially reasonable and plausible and acceptable for concerned and any other employees.
	<ul style="list-style-type: none"> Develop intercultural competence in keeping with the fields of competence set out in chapter 5 (QUALITY GUIDELINES) To internationalize the education organization train staff with 	

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	<p>a business fluent knowledge of foreign languages</p> <ul style="list-style-type: none"> • Acquire specific, ready-to-use cultural knowledge and experience in relation to the target country/countries • Ensure transnational mobility of staff involved • Create international competence matrix for teaching staff, taking account of the labour markets in the individual countries 	<p>For identification of requisite competences and their degree of development the competence matrix has proven successful as useful planning instrument. Use the competence matrix to define fields of competence (such as specialized, experience, and process knowledge, analytical-conceptual skills) and requirement levels as well as such process elements of creation of services (where applicable, up to the individual activity) for which those competences are required in a certain form. Ensure that the description of the competences required in the individual fields leads into the identification of the competences to be acquired and/or to be extended.</p> <p>Aim at including also foreign employees working for the organization in the target country in the development of competences to an appropriate extent. In general, this refers to adapting the qualifications of the concerned employees to the standards of the education organization's country of origin. Apart from the specialized contents focus is, among others, on the further expansion of language competences and the knowledge of culture, established communication styles and legal regulations of the country of origin.</p>
2.1.2	<p>Staff member satisfaction and motivation</p> <p>Record and interpret the staff members' satisfaction regularly (at least every two years)</p> <p><i>Establish concrete objectives and trend assessments</i></p> <ul style="list-style-type: none"> • Raise acceptance for the internationalization of the education organization among all staff and motivate them to support this objective • Motivate teachers and other staff to European and international education co-operation with due regard to changing competence requirements 	<p>Take account of the fact that individual attitudes and personal commitment of senior staff members and associates concerning the internationalization – who in their entirety determine the education organization's "internationalization behaviour" - have an important impact on the success of the internationalization efforts. The motivation of the employees to support the organization's internationalization strategy is thus of central importance. This process is largely affected by the leadership behaviour of the organization's management. Hence, plan and implement concrete steps, of which there must be evidence, for motivation of senior staff members and associates for realization of the education organization's internationalization objectives, based on realistic trend evaluations and benefit expectations.</p> <p>The motivation of management and associates largely depends on the identification and evaluation of development trends of employee satisfaction. It is an important indicator for the success of the selected strategy and the quality of the measures introduced for internationalization and particularly their suitability regarding the options available to the organization to actively shape this process.</p>

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2.1.3	<p>Information, communication and raised sensitivity for educational products and services</p> <p>Carry out and document internal qualifications</p> <p>Specify concrete responsibilities for educational products and processes</p> <ul style="list-style-type: none"> • Heighten staff awareness of international trends and standards in the development and implementation of education products and services 	<p>It is important to sensitize the employees of education organizations for their products and services, not least due to the close relationship between the service and the person of the service provider, characteristic for this field. Further, the immateriality of most educational products requires increased sensitivity of the receivers towards imponderabilities and risks of their “purchase” compared to the purchase of material objects. Hence, the personal attitude of the education provider plays a key role when establishing confidence in its product. This applies all the more for target areas/target countries in which the education organization has not been operating so far.</p> <p>Moreover, a general decrease of the product life cycles of concrete products and service offers on international markets as well as rapid changes of the requirements concerning contents and form of such offers are to be expected. This requires increased flexibility of the associates of the education organization in developing and introducing new and/or modified educational products and services.</p> <p>The problem of sensitizing the employees gains special importance with regard to the development of products and services involving a modification of the role of the teaching staff and of other associates (e.g. increasing significance of learning accompaniment for individual learning processes, tutoring, coaching, etc.)</p> <p>For those reasons it is essential to test and define adequate ways and methods of target-oriented and up-to-date information and sensitization of the employees regarding the education organization’s products and services in order to ensure the employees’ understanding of their responsibility for creation of services.</p>
2.1.4	<p>Systematic competence development and participation of staff members</p> <p>Document processes of competence development and participation</p> <p>Specify objectives regarding internal qualifications, plan measures</p> <p>Assess progress in competence</p> <ul style="list-style-type: none"> • Agree concrete objectives and tasks concerning qualifications to develop staff competence for internationalizing the education organization 	<p>Take differentiated estimations of the advanced training requirement as a basis also when planning qualification measures for development of competences in the intercultural area. Adapt scope and degree of complexity of the competence development processes to the possibilities and requirements of the education organization.</p> <p>Especially in smaller and medium sized organizations, senior staff members will have to assume the function of a multiplier of acquired knowledge since limited financial and time resources do not allow extended participation of employees in external advanced training courses. In general, the participation in such courses will have to be limited to the use of standard opportunities (e.g. in the area of foreign language education, etc.). Here the risk</p>

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	<ul style="list-style-type: none"> Use the experience gained by the staff of international education co-operation for the systematic development of competence 	<p>might occur of uncoordinated and unsystematic advanced training activities jeopardizing the achievement of competence development objectives.</p> <p>In this context</p> <ul style="list-style-type: none"> the existence of a clear concept for systematic integration of the competence development measures in the operational practice, and the direct involvement of all concerned in the identification of ways and objectives of qualification <p>gain special importance.</p> <p>To ensure efficient personnel development the qualification measures' benefit and the probability of success must be made transparent for all concerned. For planning of the time frame for developing intercultural competences consider that such competences must be available already before taking up the educational activities and that they have to be used during the stage of their preparation already. Hence, the relevant qualification must take place in due time in order to avoid delays in the planning and realization of the projects for internationalization of the education organization. Regular personal dialogues and estimations of potential have proven successful as means of progress control within the scope of competence development.</p>
2.1.5	<p>Assessment and selection of lecturers</p> <p>Define concrete assessment criteria for lecturers' qualifications and competence, specify procedures for regular assessment</p> <p>Apply adequate selection procedures to meet the requirements of concrete educational offers</p> <ul style="list-style-type: none"> Define intercultural competences as criteria for the evaluation and selection of lecturers and differentiate between them in keeping with the special requirements of the planned activities for internationalizing the education organization Ensure that all concerned have the same quality and standards for transnational educational institutions and that the requirements are met by the teaching staff Set up procedures to verify intercultural and, where 	<p>When defining intercultural competences as understandable criteria for assessment and selection of lecturers, take account of the aspect of existing knowledge (especially foreign language skills, skills of other communication cultures, cultural background knowledge, etc.) and the aspects of the skills (in connection with communicative competence and the capacity for teamwork, this particularly refers to the ability to reflect the own role behaviour and to change the perspective) and the motivation of the concerned (sensitivity, empathy, objectivity, readiness to learn, etc.).</p>

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	applicable, language skills	
2.1.6	<p>Personnel Management Ensure personnel management on the basis of appraisals and objective-setting, if applicable</p> <ul style="list-style-type: none"> • Ensure that international staff have the multicultural and gender-appropriate work settings they need • Standardize evaluation criteria 	Build on the objectives and tasks of the internationalization of the education organization for general assessment scales for personnel management. Define assessment criteria as clearly and unambiguously as possible and explain to employees in detail.
2.1.7	<p>Integrate lecturers as active partners Appoint selected lecturers as the business's stakeholders</p> <ul style="list-style-type: none"> • Build on the specific specialized and intercultural competences of the lecturers to internationalize the education organization • Ensure engagement and continuity of personnel 	<p>The cooperation with lecturers as stakeholders and the use of their specific specialized and intercultural competences can significantly promote the internationalization of the education organization. For example, when establishing the service offer, the organization can make prompt use of up-to-date expert knowledge, increase the practical relevance and innovative character of these offers and thus achieve a major competitive advantage on transnational markets. At the same time, in many cases, the multicultural experience and knowledge and certain personal contacts of the teaching staff allow occupation of field of activity abroad with increased target-orientation and flexibility. For this reason establish and continuously maintain loyal contacts with such lecturers mentioned by name.</p> <p>In this context simultaneously take account of the interests of the teachers in an adequate manner. This, for example, refers to their prompt instruction on issues of joint interest, their integration in decision processes and the opportunity for them to participate in advanced trainings and informative events for senior staff members and employees of the organization.</p>
2.1.8	<p>Systematic personnel development for both staff members and teachers Ensure personnel development on the basis of business objectives, staff appraisals and management by objectives</p> <ul style="list-style-type: none"> • Prepare staff systematically for the specific requirements of internationalization with a view to enabling them to cope with the specific process dynamic of intercultural learning 	<p>Systematic personnel development allowing for the specific requirements of the internationalization takes account of, among others,</p> <ul style="list-style-type: none"> • more and more dynamic change of requirements concerning competences • increasing individualization of ways of education • increasing meaning of informal learning of employees. <p>As a result also provide freedom for individual creation of advanced training processes</p>

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	situations <ul style="list-style-type: none"> • Gear the objectives of personnel development to the special requirements of the planned foreign activities • Developing the ability to recognize gender-bias in learning materials and learning situations and indicating the appropriate response in an intercultural environment 	for planning of personnel development measures.
2.1.9	<p>Dialogue, communication and joint learning Develop innovative forms of communication and learning processes in the educational organizations Use them for key processes of organizational development Provide evidence of key processes performed</p> <ul style="list-style-type: none"> • Realize joint learning processes with transnational partners • Hold transnational working meetings between management and staff and establish personal contacts • Set fixed times and topics • Adapt to different cultural habits and find an acceptable as well as result driven style of work (e.g. set fixed times and topics; document results in protocols) 	Where possible, in addition to “classical” forms of advanced trainings, use intercultural trainings, measures to increase identity formation, plan and role plays and culture-specific workshops involving participants from the relevant regions/countries as innovative forms of communication and learning processes in education organizations.
2.2	Determining, providing and maintaining learning infrastructure	
2.2.1	<p>Buildings, equipment, incl. IT infrastructure Document appropriate equipment and design of the learning sites (taking into consideration legal requirements) Conceive and appropriately document resource management (e.g. investment plan), including replacement investments, taking into consideration modern forms of learning</p> <ul style="list-style-type: none"> • Pay proportionate attention to the special requirements of the planned activities for internationalizing the education organization; the national standards of the host countries; and international standards 	When planning and providing the learning infrastructure, take account of the changes of the teaching and learning culture that can be observed on an international level. They manifest themselves particularly by the fact informal and non-formal learning processes gain increasing importance that in addition to formal-institutionalized learning. Education organizations acting on an international level must, for example, be prepared to identify and use additional areas of life outside the traditional training institutions as additional spaces for learning. This must be taken account of with increased flexibility when determining requisite learning infrastructures and their provision. Always check if the provision of a corresponding learning infrastructure under the given circumstances of the relevant learning site complies with the requirement of efficiency and the requirement of

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	<ul style="list-style-type: none"> Ensure that the local infrastructure of the education organization corresponds to a quality-based education Provide an appropriate IT infrastructure for transnational communication processes 	a high-quality education.
2.2.2	<p>Working and learning environments</p> <p>Design working and learning environments in a systematic way, paying attention to occupational health and safety as well as ergonomics</p> <p>Compliance with the requirements has to be proved</p> <p><i>Develop and document services for an appropriate attendance on the participants</i></p> <ul style="list-style-type: none"> Provide adequate logistic support to organize study visits Helping foreign participants, especially disadvantaged persons, to adapt to the changed learning and living environment Help foreign participants solve problems that might impede their learning progress Provide information on daily life and help in taking adequate precautions Ensure the constant availability of such support mechanisms 	<p>In order to achieve an adequate mentoring of learners when designing working and learning environments, where possible, complete service offers should be developed and realized in accordance with international trends currently observed.</p> <p>Such offers are characterized in that they</p> <ul style="list-style-type: none"> already start before the actual education process begins unite in one hand the support when establishing the conditions for using the educational offer and the immediate learning support. <p>Aim at comprehensive individual mentoring of learners allowing at the same time to ensure that the educational goal is reached within the intended time and with the planned expenses.</p> <p>Also with regard to the design of the working and learning environment of the learners the education organization must consider the fact that the customer benefit of an educational offer has top priority.</p> <p>This requires an overall high adaptability of the organization to changes of the customer behaviour and the transnational fields of activity.</p> <p>To enable realization of the tasks concerning the design of the working and learning environment and the mentoring of the learners with a reasonable effort aim, where possible, at a service co-operation with other education organization and relevant public administrations.</p> <p>In order to facilitate the work actively research and use national support structures (information and marketing structures, etc.) in the country of origin of the education organization and in the target region/target country, already before the planning of the support measures for foreign learners starts.</p>
2.2.3	<p>Basic contractual conditions</p> <p>The general terms and conditions must contain clear and customer-friendly regulations concerning the educational</p>	For preparation and development of the contractual regulations for transnational educational activities, note that, in addition to direct contracts to foreign customers eventually, also co-operation agreements and contracts with foreign education

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	services <ul style="list-style-type: none"> • Reach contractual agreements concerning the forms of co-operation on the basis of specimen contracts • Regulate the contractual framework concerning the forms of transnational education (chapter 3) on a legally binding basis; frame the contracts on the basis of the principles of co-operation set out in chapter 4 (QUALITY GUIDELINES) 	institutions and () with agents and agencies must be concluded. This should be taken account of by the organization by gathering relevant information concerning legal regulations, rules, etc. already prior to begin of the transnational activities. Sources should be specified for corresponding information concerning legal and/or country-specific issues. E.g. by the foreign ministry (Germany: Department of Foreign Affairs) and institutions for promotion of foreign trade activities and direct investments (Germany: BfAI [German Office for Foreign Trade Offers])
2.2.4	Equipment for “on-site education” <i>Define resources for flexible educational projects on the customer’s premises</i> <i>Give guidelines for suitable IT and presentation techniques, handouts and the like</i>	When providing equipment for flexible educational projects, the education organization must prepare to take account of new ways of learning and learning cultures, new learning locations and unusual learning times, new subjects, new forms of teaching and learning, means and instruments and methods and procedures. In this context, particular importance is accorded to complex teaching and learning arrangements, such as qualification in practice companies, cross-learning location teaching and learning arrangements as well as tele-learning, virtual learning sites, etc.
2.2.5	Portfolio for educational technologies Assess educational technologies (e.g. conforming to the portfolio method), particularly with regard to market and growth potential	When assessing modern educational technologies, take account of their actual distribution (e.g. in the result of changed learning behaviour and changed frame conditions of the educational process) in the target region/in the target country, the factors promoting this process and the factors impeding it. Where possible include corresponding questions in the systematic market observation.
2.3	Partnerships with teachers	
2.3.1	Integration of lecturers into business development Define suitable forms and panels to integrate the lecturers into the work of the educational organizations (e.g. by means of strategy meetings, brainstorming, participation in staff meetings and the like) <ul style="list-style-type: none"> • Involve lecturers in the internationalization of the education organization, using their specific experience and skills • Encourage proposals for improving the international co-operation and implement them 	Experienced lecturers must be integrated in the development of a pedagogic and managerial overall concept to internationalize the education organization. In particular their specific specialized and inter-disciplinary knowledge and experience, and their ability for conceptual work and strategic planning of education processes, personal commitment, and motivation provide a resource of the education organization which is almost impossible to be replaced or imitated by competitors on international markets. Hence, adequate forms and methods of integration of such teaching staff in a forward-looking company development must be designed and tested, of which there must be evidence. In this context the integration of the relevant lecturers in the strategic orientation of the knowledge management of the education organization plays an

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		important role.
2.3.2	<p>Participation of lecturers in educational projects Arrange and record the stimulation and integration of lecturers in respect of acquisition, preparation, implementation and results of educational courses</p> <ul style="list-style-type: none"> Specify exactly the tasks of lecturers relating to the internationalization of the education organization Actively involve lecturers in customer acquisition and the development of new international education products 	<p>Intensive participation of lecturers in educational project is of particular importance for transnational activities not last due to the fact that they are assigned a key function in the individual support of the learners. This is particularly important for assurance of the quality and the success of education – as shown by international comparisons. This concerns the support of the learners during the qualification measure as well as the transfer securing and the contact work regarding “former” participants, which is important, among others, for the further customer acquisition.</p> <p>Note that the success of the active integration of the learners also depends on conditions such as sufficient time funds, balanced numbers of learners and participants, etc.</p>
2.3.3	<p>Establishment of and participation in networks Provide evidence of active participation in educational and business networks</p> <ul style="list-style-type: none"> Promote the setting up of transnational networks between teachers Develop suitable forms and methods of active participation of teachers in the international work of the education organization 	<p>The development of transnational networks and/or the integration in already existing networks should take place on the following levels, among others:</p> <ul style="list-style-type: none"> international networks of former participants in education measures. These networks can be used for distribution of follow-up offers to former participants and for acquisition of new participants by personal recommendations as successful and cost-efficient form of marketing. Education exporters can simultaneously use these networks to achieve an additional benefit by establishing a contact base for the customers themselves. interconnection with providers of advanced training abroad. This allows synergy effects and opens up improved competitive chances. international interconnection with stakeholders, such as consulting agencies and information services, with the aim to improve the quality of education and to increase competitiveness of the organization co-operation with worldwide companies to receive inputs for medium and long-term content orientation of the education opportunities, where applicable, to win potential customers and to find participants of qualification measures for employments. contacts with external experts on national and international level.
2.4	<p>Knowledge management Provide evidence of a systematic procedure for gaining knowledge and transferring it into the business</p>	<p>Integrate target-oriented methodical experience as key elements for internationalization of the educational activities.</p> <p>It is recommended to agree on the use of one language for the knowledge management</p>

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	<p>Apply principles of knowledge order and storage Define instruments and regulations regarding access to the stocks of knowledge Specify procedures for eliminating and archiving obsolete knowledge</p> <ul style="list-style-type: none"> • In your personnel development and in the development of education products make systematic use of interculturality, the emergence of European education strategies, and experience from other countries • Take account of the need for multilingual knowledge management 	and/or to select suitable languages based on the existing language skills.
2.5	<p>Financial resources Document systematic determination of demand and financial planning and an appropriate financial controlling in order to provide evidence of the economic capability</p> <p>Give an exact breakdown of the financial requirements for internationalizing the education organization</p>	<p>For identification of the financial requirements of the internationalization, scenarios should be developed taking account of the corresponding specific forms of transnational educational activities.</p> <p>For this</p> <ul style="list-style-type: none"> • risk costs of international business • relevant customer preferences regarding payment procedures, and • estimation of sales potential estimation <p>should be considered.</p> <p>Reference to 1.6 with special consideration of planning to be assumed for the use of resources, see also 1.4 and / or 1.5</p>
2.6	<p>Strategic business planning, including risk management In business practice, apply and record appropriate methods and instruments (e. g. balanced score card, risk assessment table)</p> <ul style="list-style-type: none"> • Take documented and appropriate account of risks involved in transnational transactions 	<p>The strategic decision to internationalize their activities results in a lockup of resources, particularly for small and medium-sized education organizations that enter a considerable entrepreneurial risk by doing so.</p> <p>In respect to transnational educational activities these risks mainly exist in connection with</p> <ul style="list-style-type: none"> • the discontinuity of national politics in the target countries (change of priorities and strategies, changeover of power) • the development of defence strategies against foreign education providers using accreditation and evaluation measures

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		<ul style="list-style-type: none"> • withdrawal of deregulation measures, (re-) introduction of licensing of education organizations • socially incompatible tuition fees • competition by traditional providers on the relevant market • disadvantages from the situation as foreign language speaker • overcommercialization of the education market in the target country making potential interests insecure and provoking government regulatory measures, etc. <p>As a result identification of target-oriented possibilities to avoid and reduce risks and development of strategies, such as</p> <ul style="list-style-type: none"> • use of already existing structures of a local partner institution, • transfer of activities to national education-promoting agencies within the scope of customer acquisition <p>is required.</p> <p>Information services (e.g. BERI-Business Environment Risk Intelligence) can be used for risk assessment.</p>
3	Conceiving, implementing and evaluating educational offers	
3.1	Educational marketing	
3.1.1	<p>Customers' educational demands</p> <p>Record and take into consideration the respective educational demands</p> <p>Provide evidence of co-operation with customers</p> <ul style="list-style-type: none"> • Record education requirements of transnational customers with due regard for country-specific conditions and requirements • Demonstrate a knowledge of the customer target groups and their education requirements • Demonstrate a knowledge of the education structures as well as the basic and advanced training systems in the relevant country 	<p>For identification of the needs for education on a transnational level, take account of dynamic change processes. Hence, the evaluation of needs must not be considered as a one-time process (for example prior to market entry only) but as a permanent task, of which there must be evidence. Determine the rhythm of repeated education analyses according to the dynamic of changes in the target region/target country.</p> <p>For evaluation of the needs for education it is recommended to adapt standard check lists to the needs of the own education institution.</p>

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	<ul style="list-style-type: none"> Take particular account of learning opportunities with regard to linguistic, social and cultural integration 	
3.1.2	<p>Development of customer demands Provide evidence of a methodology and its regular application in educational demand analyses Assess demand development</p> <ul style="list-style-type: none"> Analyse the transnational demand and the requirements for educational services Check effectiveness of international educational measures 	<p>For review of the effectiveness of international education measures make a distinction between output and outcome, where possible. The results of this evaluation should be integrated in the optimization of objectives, contents, and forms of the education measures, where applicable.</p> <p>The benefit generated by the measure should be identified as clearly as possible and made transparent. Corresponding reports by participants should be integrated in the advertisement measurements for the provider's educational products.</p>
3.1.3	<p>Customer/user information Provide customer/participant-oriented information on educational offers by means of the appropriate media</p> <ul style="list-style-type: none"> Ensure information is available in all relevant languages Take account of country-specific conditions and external communication factors Ensure appropriate and reliable description of the education services in customer/user information Make transparent the differences in the evaluation of certificates by professional associations and other relevant corporations in the home country and the country in which the training takes place 	<p>Ensure that the information is as individualized as possible and tailored to the actual needs of the respective interested persons and/or users. Such procedure increasingly reveals to be a key factor when achieving competitive advantages, especially on education markets in great demand.</p>
3.1.4	<p>Interactive customer communication Provide evidence of a systematic customer communication implemented by means of information exchange and dialogue, using social and technical communications</p> <ul style="list-style-type: none"> Deciding whether market communication is to be carried out on a standardized or regionalized basis In interactive customer communications take account of the 	<p>It should be ensured that the interactive customer communication is designed as a permanent process. The customer benefit must be in the centre of the communication process. Especially on international markets, it is the decisive factor for the success of education measures.</p>

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	culture of the target country and the specific modes of communication available <ul style="list-style-type: none"> • Create transnational customer networks 	
3.1.5	Assessment of customer requirements Ensure a systematic contract review that includes the requirements of both the principals and the participants <ul style="list-style-type: none"> • When reviewing contracts take account of different legal systems and notions of law with due regard for the national and international sources of international and private law • Formulate clear and transparent provisions for dealing with conflicts of law between all contracting parties 	The complexity of evaluation of customer requirements must be taken account of, of which there must be evidence. In order to ensure completeness and clearness of the evaluation use check lists and similar instruments, if applicable.
3.1.6	Customer management Introduce and record a customer management system <ul style="list-style-type: none"> • In customer management take account of the cultural differences in approaching customers and in the customer-bonding instruments used as well as of the various data protection regulations 	Systematic customer management on a transnational level should include both, current participants in education measures and potential customers, and former participants in education measures of the organization. Especially the continuation of the contacts with participants of education measures has a multiple benefit for the marketing of the education organization.
3.2	Education-related advice	
3.2.1	Advice on educational offers Give interested parties and participants advice regarding educational offers and the respective requirements Demonstrably test the qualification as a prerequisite for entering into a contract with the participants <ul style="list-style-type: none"> • When advising transnational customers take documented account of country-specific requirements and conditions • Provide binding documentation of the syllabus, the duration of the various courses, and the type of certificate awarded for all courses, and give it to the participants 	Consultation concerning education opportunities is more and more becoming an essential condition of successful education export. By interconnection of the educational offer with consulting services education providers transform to “system providers” in the education service area. The consequent expansion and diversification of their services helps these organizations to generate additional competitive advantages on international markets. Hence, it should be reviewed to which extent the education organization - in co-operation with other education providers - has the possibility to follow this trend. The instruments European Qualification Framework (EQR), National Qualification Framework (NQF), and credit systems (ECVET) that are currently developing in Europe should already be used within the scope of the education consultation in order to allow

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	<ul style="list-style-type: none"> • Use this certificate to test the comparability of the material taught in the courses in the home/host country • Demonstrate a knowledge of education and careers in the relevant countries as a condition of proper consulting 	<p>more transparent and comparable representation of the education service.</p> <p>Potential participants should have a reliable access to information and consultation sources with respect to the learning offers and their conditions of use. For example clear information concerning the role and task of the despatching and hosting organization and concerning the various systems of general and vocational education should be provided. The consultation should include language, pedagogic, administrative, Legal, personal, and cultural aspects as well as information concerning financial aspects.</p>
3.2.2	<p>Learning-related advice</p> <p>Apply a flexible methodology of giving individual learning-related advice</p> <p>Introduce, apply and document methods for promoting the individual learning processes</p> <ul style="list-style-type: none"> • Develop suitable mechanisms for monitoring the learning progress of foreign participants • Ensure that suitable support mechanisms are available to: <ul style="list-style-type: none"> • help foreign participants adapt successfully to the changed learning and living environment • help them solve problems that might impede their learning progress • provide information on daily life and help in taking adequate precautions 	<p>In the context on the worldwide increasing importance of non-formal and informal learning forms and in view of the increased differentiation from ways, forms, and methods of learning an individual learning consultation is becoming an increasingly essential part of the support of learning and education processes.</p> <p>Hence, the individual learning consultation should be recognized as immanent part of the organization's educational offer.</p>
3.2.3	<p>Education-related advice for businesses</p> <p>Offer advice on the economy's demand for qualification</p> <p><i>Support businesses and organizations with regard to educational strategies and personnel development</i></p> <ul style="list-style-type: none"> • Analyse education requirements on the international labour market • Offer education consulting in the field of necessary professional qualifications 	<p>Education consultation for companies includes support of the companies to identify the needs for education. The identification of the needs for education also includes the consultation regarding optimum ways and methods for qualification of employees according to company size, type of creation of services, and available financial and time resources.</p> <p>An essential aspect of education consultation is the information of the companies concerning which vocational qualifications actually comply with their requirement profile. This is subject to considering consideration of both, current and foreseeable perspective requirements.</p>

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	<ul style="list-style-type: none"> Demonstrate a knowledge of the economy as well as of the education and career system in the relevant country 	
3.3	Development of new educational offers	
3.3.1	<p>Development planning Systematically develop educational offers by means of regulated processes</p> <ul style="list-style-type: none"> Document the development plan and name those responsible <hr/> <ul style="list-style-type: none"> Ensure the international marketability of the education products and services 	<p>When organizing the development of educational offers for the international market, define measures and ways to ensure the required flexibility and rapidity to react on changing demands, etc, from the beginning. The influence of the education and/or the educational offer on the cultural development should be considered here.</p>
3.3.2	<p>Requirements for the educational offer Specify educational objectives, content, extent, means and methods in a way that is oriented towards the target groups and the educational objectives Determine legal and other provisions to be taken into consideration Include experience from previous courses <i>Develop flexible educational offers applying new forms of learning</i></p> <hr/> <ul style="list-style-type: none"> Define education targets, content, extent, resources and methods with due regard for the specific cultural conditions of the target country Ensure that the qualifications obtained are of equal value in that they meet the requirements of both the despatching and the recipient countries For those directly concerned with transnational education services lay down rules of conduct regarding <ul style="list-style-type: none"> safeguarding the interests of participants the quality of the education service 	<p>Design the educational offer in a way allowing flexible reaction on new requirements resulting from changing learning habits and conditions. In particular, take account of the dynamic development of new learning types accompanying an increasing individualization and diversification of ways and processes of learning.</p>

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	<ul style="list-style-type: none"> • the appropriateness of the establishments in which the education services are provided • the intercultural and gender-specific dimension • Assume responsibility as educational institutions for certifying the results of the courses • Make the design of the education certificates informative, striking and transparent, making clear their relation to internationally agreed standards, so that the qualifications can be more easily assessed by those to whom they are presented – educational institutions, employers, etc. • Ensure that certificates include data on the type, duration, content and locations as well as on the language of the course as obligatory information 	
3.3.3	<p>Development of the curriculum</p> <p>Assess the achievement of the development objectives in the individual phases, incorporating those involved</p> <p>Specify criteria, characteristic figures and indicators for quality assurance and quality development during and after the implementation of the educational offers</p> <p>Document the results of the development (curriculum)</p> <ul style="list-style-type: none"> • Take account of differences in teaching and learning cultures as well as in cultural traditions and customs of foreign customers • Remember the need for transnational recognition of the results • Regularly update the offer and adapt it to the conditions of the target country • Check requirements and feasibility in accordance with international quality criteria and the criteria of the participating countries 	<p>For development of the curriculum consider possibilities to individualize learning processes. In order to ensure successful use of the curriculum flexible connection options and other curriculums must be provided for simultaneously. In this context particularly modularized learning offers have proven competitive on an international level. If a learning unit completed abroad is part of a comprehensive qualification this should be documented in the curriculum and the participants should be supported in order to facilitate crediting and certification.</p>

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3.3.4	<p>Verification</p> <p>Test whether the curriculum meets the requirements specified for the educational offer</p> <p>Record results of and conclusions from the verification</p> <ul style="list-style-type: none"> • Include internationalization requirements in the verification of the education offer • Check whether the educational qualifications of the internationally employed teaching personal really are recognized on the basis of the subject taught and the certificates issued 	<p>When reviewing the curriculum for compliance with the defined requirements concerning the educational offer, always take account of the advance function of education. This means ensure that the mediated contents do not only fulfil the requirements of the current moment but take also account of foreseeable development tendencies of future requirements.</p>
3.3.5	<p>Changes to the curriculum</p> <p>Comprehensibly document changes to the curriculum</p> <p>Determine effects on ongoing or planned educational offers and inform the bodies or people concerned in time regarding the changes</p> <ul style="list-style-type: none"> • In international projects and co-operation arrangements make changes in consultation with the partners and in accordance with the defined areas of responsibility 	<p>Changes to the curriculum must be transparent and clear and increase the customer benefit, of which there must be evidence. Also communicate this to the customers in a suitable way.</p>
3.3.6	<p>Evaluation of educational offers</p> <p>Check at least following the first application of a newly developed educational offer, and regularly afterwards, whether the requirements specified for the educational offer have been met completely and whether the specified criteria, characteristic figures and indicators are suitable to achieve a reliable quality assurance and quality development</p> <p>Carry out the evaluation by means of recognized methods</p> <p>Record the results of and conclusions from the evaluation</p> <ul style="list-style-type: none"> • Develop evaluation procedures together with the participating partners and co-ordinate them 	<p>Such requirements concerning the design of transnational education measures, such as flexibility, ability for individualization, and orientation towards a clearly defined customer benefit must be reflected by the criteria for evaluation of the educational offers.</p> <p>For this consider an implementation aid, the specification of an evaluation procedure and/or follow proven evaluation principles.</p>

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	<ul style="list-style-type: none"> Apply international methods of evaluation or such as are recognized in the participating countries 	
3.3.7	<p>Development of a specific performance profile Develop and regularly update a specific performance profile for the educational organization with reference to subject-, sector- and/or regional-specific characteristics <i>Involve customers in the development process</i></p> <ul style="list-style-type: none"> Include country-specific characteristics in developing the performance profile In making the profile take account of the need to co-ordinate with transnational partners 	<p>The specific specialized and industry-related orientation of the service profile allows, for example, to cover regional company and/or profession-specific requirements. Thus it allows the intensive penetration of a certain market segment and the development of basic unique selling propositions as important competitive advantage. For development of such specific performance profile also preserve the possibility for flexible reaction on the dynamic of changes of the demand behaviour. Aim at combining the development of a specific service profile with the development and intensification of co-operation relations to the providers of supplementary service offers.</p>
3.3.8	<p>Life cycle of the educational offers <i>Represent the educational offers (life-cycle models) on the basis of market developments</i></p> <ul style="list-style-type: none"> Take account of national differences in customer requirements and expectations as regards the length of the life cycle 	<p>The identification of the life of an educational product must be based on target-oriented observations of the market development that are repeated at least once per year. Identifications that were performed only once do not meet the requirements concerning educational offers on transnational markets.</p>
3.4	Implementation planning	
3.4.1	<p>Content-related, technical and resource planning Apply a regulated procedure for planning educational courses</p> <ul style="list-style-type: none"> Plan personnel, material and financial resources and provide them on time making due allowance for additional expenditures arising out of transnational activities 	<p>The planning of transnational activities must be based on precise ideas concerning the field of activity of the education organization abroad. For identification of the additional expenses take account, among others, of factors, such as</p> <ul style="list-style-type: none"> numbers of customers/numbers of participants of educational courses in the target region/in the target country the geographic size of the field of activity the number and duration of requisite stays and trips in the target region/in the target country the sales potential in the field of activity. <p>Ensure in particular that sufficient material and time resources are planned in order to</p>

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		ensure adequate care of existing customers, participants of educational courses and partners and to win new customers, participants, and partners and to extend the field of activity of the education organization abroad.
3.4.2	Organizational planning Provide evidence of organizational models and checklists regarding organizational planning <ul style="list-style-type: none"> • Adapt the organizational blueprints and checklists to the concrete conditions of the foreign venture 	The organizational planning should be flexible and leave room for integration of new ideas and stimulations - particularly to react on the prevalence of new learning technologies, on changing requirements concerning the design of learning processes, etc.
3.4.3	Flexibility <i>Carry out the necessary modifications in time (e.g. planning of implementation variants)</i> <ul style="list-style-type: none"> • Create and exploit conditions for a flexible response to changes in the transnational business • Define the scope for discretion of the participating partners 	The creation of room required in order to flexibly react on market changes and on innovations for prompt implementation is a permanent task. Particularly for the preparation of transnational activities in the educational sector, flexible planning providing several choices of action and not leading to binding definitions until the data and information basis required for this is actually available is to be preferred over a fixed plan requirements.
3.5	Implementation	
3.5.1	Implementation in accordance with planning Document process of implementing educational offers with regard to participants, stating results <ul style="list-style-type: none"> • Ensure the documentation on the implementation follows the same terms of reference at a transnational level • Make the documentation available to the co-operation partner according to agreed rules 	The implementation of transnational educational offers according to plan requires, among others, <ul style="list-style-type: none"> • that also foreign employees in the target country were acquainted with the details of the planned objectives and task of education, • that the implementation of the educational offers are continuously revised • that eventually required changes regarding the process of learning and teaching are discussed and implemented together with local teaching staff members.
3.5.2	Participant-oriented design of the learning processes Demonstrably implement modern learning conceptions, methods for the promotion of individual learning processes, and flexible forms of learning <ul style="list-style-type: none"> • Take appropriate account of the special cultural traditions 	The participant-oriented design of learning processes generally aims at their adaptation to individual learning requirements and needs. The success of this process mainly depends on the ability of the lecturers to combine the classic function of teaching with the elements of learning support and consultation and especially coaching, in a flexible way. This is subject to a target-oriented preparation of the teaching staff members to represent this function.

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	and customs of foreign customers <ul style="list-style-type: none"> • Clearly define the specialist, linguistic and other qualifications required to attend a course • Take account of specialist and linguistic preparation and support and enable participants to improve their knowledge of foreign languages • Whenever possible make an assessment of language skills and provide support in learning the language before departure and in the host country • Taking appropriate account of gender-specific requirements 	Simultaneously, a participant-oriented design of the education organization's offers requires complementation of the educational offers by target-oriented services for development of the learning environment, in particular.
3.5.3	Documentation and control of documents Ensure an orderly system for the control of process-related specification documents and records <ul style="list-style-type: none"> • Take account of multilingual requirements as well as of the standards, legal regulations and customs relating to documentation 	Design documentation and control of documents in a way that they provide a basis allowing rapid and flexible reaction on changing conditions of the internationalization process. This particularly refers to scope and quality of the documentations themselves and also to the design of the access options for the employees.
3.5.4	Intermediate checks Ensure regular learning success checks (participant- and course-related) <ul style="list-style-type: none"> • Where necessary, schedule and carry out on-the-spot checks 	Plan on-the-spot checks as fixed component of the implementation of educational offers on transnational markets, among others, due to the fact that experience has shown, that, when transmitting results of checks in intercultural communication processes, misunderstandings and misinterpretations cannot be excluded which impedes the development of an adequate image of the local situation in the target country with the people in charge in the despatching country.
3.5.5	Problem control and corrections Develop and apply in a verifiable way nonconformity and problem identification procedures as well as procedures for assessing and correcting these nonconformities and problems Introduce and maintain complaint management <ul style="list-style-type: none"> • Implement internationally agreed Change Management 	Consciously use and develop Change Management as Instrument to change and improve the education organization's company activities. For this purpose, assign persons in charge of the relevant changes to be realized. Take account of the comprehensive, interdisciplinary character of Change Management for the internationalization of the education organization.

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3.6	Evaluation, identification of results and interpretation	
3.6.1	<p>Participant statistics Specify procedure for survey of participant data</p> <ul style="list-style-type: none"> • Take account of national differences in the requirements to be met by the statistics on participants • Reflecting interculturality in statistics 	<p>Ensure continuous and target-oriented evaluation of the participant statistics and their use as instrument for improvement management, for identification of relevant trends and tendencies in the user behaviour and for derivation of suitable internationalization strategies.</p>
3.6.2	<p>Success assessment Qualified documentation of individual learning results Develop procedure/methodology for balancing between educational objectives and results as well as their usability in the field of work (see line 3.3.6 – evaluation)</p> <ul style="list-style-type: none"> • Demonstrably ensure that evaluations are transnationally comparable • Apply internationally recognized methods of success assessment • Ensure reporting takes place according to jointly developed criteria and models 	<p>The success evaluation must reflect the immediate results of the education services (customer satisfaction, number of participants, sales, etc.) and also the created conditions for future penetration of the education market in the target country, particularly conditions for securing the sustainability of the working results.</p> <p>For learning units completed abroad a suitable document should be issued allowing the participants to satisfyingly prove their active participation and the completion of the learning targets.</p> <p>In this context the use of the “Europass” should be checked. (Decision no. 2241/2004/EC of the European Parliament and the Council of 15 December 2004 concerning a uniform joint frame concept for promotion of transparency for qualifications and competences (Europass) (ABl. L 390 dated 31.12.2004, p. 6)</p> <p>The instruments European Qualification Framework (EQF), National Qualification Framework (NQF) and credit systems (ECVET) should be used for representation of education services in a transparent and comparable manner.</p>
3.6.3	<p>Success assessment carried out together with the customers Put into practice procedure/methodology for balancing between educational objectives and results, actively integrating the participants and other customers Demonstrably draw conclusions regarding follow-up educational offers and accompanying services</p> <ul style="list-style-type: none"> • In the success assessment ensure lines of communication with transnational customers 	<p>The focus of a success assessment performed together with customers must be on the customer benefit. This requires integration of not only the immediate learning result but also of the transfer results in the assessment.</p> <p>Define procedures to integrate the assessment results in improvement measures and projects in a target-oriented manner.</p>

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
3.6.4	<p>Retention of experience <i>Systematically record content-related and methodical experience (e. g. conforming to the principle of strengths and weaknesses)</i></p> <ul style="list-style-type: none"> • Demonstrably use the possibilities of international exchange for the exchange and adoption of examples of Best Practice 	Ensure that the identified experiences are accessible for the employees and that there is evidence that they are applied.
3.6.5	<p>Educational enterprises as learning organizations Regularly interpret results and experience Put into practice an improvement management system for the business venture</p> <ul style="list-style-type: none"> • Incorporate experience and knowledge gained from internationalizing the education organization in the assessment of results and improvement management • Take account of international experience in the requirements profiles for the teaching staff 	Initiate and guide the employees' process-bound learning in the context of internationalizing the education organization in a target-oriented way. At the same time, find rational ways and methods for securing results. Document personal responsibilities in a suitable manner.
3.6.6	<p>Creation of business process models <i>Record the processes and their interactions up to business process models</i></p> <ul style="list-style-type: none"> • Consider internationalization as part of the business process models 	<p>The identification of the individual factors of the business process model and their interactions should in particular be based on the objectives of the internationalization of the education organization and the frame conditions for realization of the education offers in the target region/in the target country.</p> <p>Hence, for implementation of business process models, use already existing models have been successfully realized under similar conditions. However, those must be reviewed under the aspect of their suitability for the specific tasks and conditions of the relevant organization and correspondingly modified.</p>
4	Measuring, analysing and improving educational processes	
4.1	<p>Surveillances, tests and identification of results Measure the degree of achievement of objectives with regard to the business, the business areas and the educational offers on the basis of the characteristic figures or indicators determined</p>	When defining measures for controls, checks, and identification of results clarify intended purpose and way of use of such analysis processes, from the beginning on. The use a matrix to show the partial processes of the creation of services in the education organization to be influenced, optimized, and improved as well as the analysis results to

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
	<p>Assess performance/effectiveness of the educational processes</p> <ul style="list-style-type: none"> • Develop and apply adequate indicators for transnational education work • Take account of country-specific requirements to be met by indicators • Make important indicators comparable as far as possible 	<p>be used as a basis, is recommended.</p>
4.2	<p>Recording and interpretation of customer satisfaction Specify and apply a methodology for recording customer satisfaction with regard to different forms of learning and customer groups</p> <ul style="list-style-type: none"> • Develop a joint understanding for the criteria and scales of customer satisfaction • Take account of country-specific factors in customer judgments • Define and demonstrate a methodology for measuring customer satisfaction, including that of foreign customers 	<p>Since communication of customer satisfaction and/or the use of “testimonials” (reports of satisfied customers) prove as a highly convincing marketing instruments, also for the internationalization of education offers, systematically document expressions of customer satisfaction and publish them in a suitable manner. An important condition for the success of this strategy is the personal contact with the users of the educational products and to respond to their individual learning needs.</p>
4.3	<p>Characteristic figures of the educational market <i>Obtain characteristic reference figures for industry-related or regional assessments of the educational market</i></p> <ul style="list-style-type: none"> • Procure comparative indicators for sector-related, regional, national and international evaluations of the education market • Use existing comparative indicators in current international use so long as they are appropriate to the desired comparisons • Ensure that the same quality standards are applied in all domestic and foreign educational establishments of the provider • Ensure that Quality Assurance is conducted by the same 	<p>When selecting education market characteristic figures for comparison, ensure that they provide information, in particular on</p> <ul style="list-style-type: none"> • the way of identifying the customer benefit and the ways and methods to take it into account • changes of demand behaviour and the corresponding reactions of the providers • the scope and speed of the development of new learning habits and the introduction of new forms and methods of learning.

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
	organizations	
4.4	<p>Evaluation and internal auditing Check and document the effectiveness of quality assurance, integrating the staff members of the educational organization</p> <ul style="list-style-type: none"> • Check and document applicability to transnational quality comparisons with due regard for the relevant standards of the International Organization for Standardization (ISO), the European Union, and the target countries • Make the educational institutions abroad and in the home country responsible for Quality Assurance and control • Define the areas of responsibility for the Quality Management system and internal auditing accordingly • Provide information for auditors on the quality of the programmes offered by the education provider at home and abroad 	<p>Document the objectives and intentions of internationalizing the education organization to be verified in their realization. For this purpose, hierarchically organize objectives and intentions and select suitable characteristic figures, criteria, and indicators providing an adequate reflection of the status of their realization. Where possible perform long-term comparisons of the relevant development status over several years.</p>
4.5	<p>Success analysis Analyse the collected data with regard to trends and success development using statistical interpretations and assessment procedures</p> <ul style="list-style-type: none"> • Demonstrate the evaluation of the results of internationalizing the education organization as an integral part of the success analysis 	<p>Support the success analysis of transnational activities by a system of hierarchically organized criteria. Such system must particularly include the following factors</p> <ul style="list-style-type: none"> • customer benefit • customer satisfaction • sales development • strategic development <p>The success analysis must be made productive as part of a target-oriented success planning. For this purpose, identify the individual success factors and group to “success modules”. Their interconnection reveals a “success pattern” that allows detailed definition of strengths and weaknesses of the work. It may be used to optimize the education organization’s activities and to evaluate chances and risks. For this purpose, check, among others, which “success modules” (e.g. initial diagnosis, combination of resources, determination of objectives, etc.) are reinforced by the development of individual success factors.</p>

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
4.6	<p>Correction and prevention of nonconformities Regulate interventions in educational processes by participants, lecturers, project leaders or business management for cases of problems/nonconformities as well as the relevant advice</p> <ul style="list-style-type: none"> • Change Management must be based on the characteristic figures and indicators arising out of the international organization of basic and advanced training courses • Correction and prevention of nonconformities in transnational activities must be regulated with all transnational partners 	For implementation of measures for correcting faults take particular account of cultural conditions and traditions of the target region/the target country.
4.7	<p>Improvement process, improvement projects Specify improvements with emphasis on certain aspects, using results, structures and processes previously evaluated Provide evidence of concrete improvement projects for each fiscal year</p> <ul style="list-style-type: none"> • Document the progress made in internationalizing the education organization 	Always prove the meaning and benefit in respect to the concrete objectives and tasks of the internationalization of the education organization. In doing so, take account of the dynamic of the change of influence factors of the internationalization process. Integrate the organization's employees in the development of improvement projects and also the receivers of the educational products in the target country.
4.8	<p>Results related to the staff members Define and apply indicators related to staff members (e.g. qualification certificates, fluctuation, willingness to work and the like)</p> <ul style="list-style-type: none"> • Include indicators of intercultural competencies 	Among others, the results achieved by the efforts to internationalize the education organization with regard to the acquisition, the development, and deepening of employees' competences should be documented in relation to concrete persons. This basis allows planning and implementation of further requisite human resources development measures.
4.9	<p>Participation and empowerment Delegate responsibility systematically and provide evidence of staff members' willingness to take on responsibility, giving special consideration to improvement projects</p> <ul style="list-style-type: none"> • Create awareness of transnational activities as a separate sphere of responsibility which is a fixed part of the service provision of the education organization 	The transfer of responsibility for the education organization's transnational activities to all involved employees is an important requirement for the development of successful "internationalization behaviour" of the organization. Consider the ability of the senior staff members for empowerment as one of the education organization's important resources within the process of internationalization and develop it with corresponding consciousness.

6 Implementation assistance for the individual requirements of the QUALITY GUIDELINES

Nr.	Requirements	Implementation assistance for the requirements for a quality-based design of transnational education QUALITY GUIDELINES
4.10	<p>Society-related results Provide evidence of the social acceptance and effectiveness of the educational organization (e.g. by participation in panels, demonstrable contributions to regional development and the like)</p> <ul style="list-style-type: none"> • Expand social acceptance to cover transnational effectiveness • Make demonstrable contributions to transnational co-operation and, where applicable, development partnership 	<p>Another aim of internationalizing the education organization is to contribute to the reinforcement of the cultural and economic relationships between despatching country and target country. Hence, evaluate possibilities to organize exchanges of information and experiences with interested partners beyond the immediate business activity and to attend presentations, trade fairs, etc. in the target country. Document such activities in an adequate manner.</p>
4.11	<p>Key results Combine all requirements in the form of key indicators and provide evidence of development trends regarding these indicators</p> <ul style="list-style-type: none"> • Take account of key indicators for transnational education work 	<p>The derivation, development, and use of key indicators for the transnational education work must be based on its objectives. The work with relevant indicators must be based on the identification of its reference framework. This covers all essential fields and dimensions of activity of the internationalization.</p>

7 Cross-reference table PAS 1037:2004 and ISO 9001:2008

No:	Requirement groups and requirements of PAS 1037:2004	Reference to requirements of ISO 9001:2008
1	Managing and developing the educational organization	
1.1	Strategy development and its regular assessment	4.1
1.2	Guiding principle and quality policy	5.1, 5.3
1.3	Business and quality objectives	5.4.1
1.4	Business planning	
1.5	Organizational and operational structure, including business areas and co-operations	5.5.1, 4.2
1.6	Provision of resources	5.1
1.7	Availability of documents and data	4.2.3, 4.2.4
1.8	Information and communication within the business	5.5.3
1.9	Controlling	8.2.3, 8.2.4
1.10	Co-operation and networks	7.2.3, 7.3.1, 8.2.1
1.11	Management review of the organization	5.6
1.12	Responsibility for QMS	5.5.2
1.13	Senior staff members' exemplary effect	
1.14	Participation in the development and improvement of the management system	
1.15	Communication with stakeholders	
1.16	Motivation, support and appreciation of the staff members	
1.17	Identification and design of strategic key processes	
2	Allocating/providing and developing staff members, teachers, learning infrastructure	
2.1	Developing personnel (staff members and teachers)	
2.1.1	Development of competences	6.2.2
2.1.2	Staff member satisfaction and motivation	6.2.2
2.1.3	Information, communication and raised sensitivity for educational products and services	6.2.1
2.1.4	Systematic competence development and participation of staff members	6.2.2
2.1.5	Assessment and selection of lecturers	6.2, 7.4.1
2.1.6	Personnel management	6.2.2
2.1.7	Integrate lecturers as active partners	7.4.1
2.1.8	Systematic personnel development for both staff members and teachers	
2.1.9	Dialogue, communication and joint learning	
2.2	Determining, providing and maintaining learning infrastructure	
2.2.1	Buildings, equipment, incl IT infrastructure	6.3
2.2.2	Working and learning environments	6.4
2.2.3	Basic contractual conditions	7.2.1, 7.2.2
2.2.4	Equipment for "on-site education"	6.3

No:	Requirement groups and requirements of PAS 1037:2004	Reference to requirements of ISO 9001:2008
2.2.5	Portfolio for educational technologies	
2.3	Partnerships with teachers	
2.3.1	Integration of lecturers into business development	5.5.3, 7.3.2
2.3.2	Participation of lecturers in educational projects	
2.3.3	Establishment of and participation in networks	
2.4	Knowledge management	
2.5	Financial resources	
2.6	Strategic business planning, including risk management	
3	Designing, implementing and evaluating educational offers	
3.1	Educational marketing	
3.1.1	Customers' educational demands	5.2, 7.2.1
3.1.2	Development of customer demands	7.2.1
3.1.3	Customer/user information	7.2.3
3.1.4	Interactive customer communication	7.2.3
3.1.5	Assessment of customer requirements	7.2.2
3.1.6	Customer management	
3.2	Education-related advice	
3.2.1	Advice on educational offers	
3.2.2	Learning-related advice	7.2.1
3.2.3	Education-related advice for businesses	7.2
3.3	Development of new educational offers	
3.3.1	Development planning	7.3.1
3.3.2	Requirements for the educational offer	7.3.2
3.3.3	Development of the curriculum	7.3.3, 7.3.4
3.3.4	Verification	7.3.5
3.3.5	Changes to the curriculum	7.3.7
3.3.6	Evaluation of educational offers	7.3.6
3.3.7	Development of a specific performance profile	5.2, 5.3
3.3.8	Life cycle of the educational offers	
3.4	Implementation planning	
3.4.1	Content-related, technical and resource planning	7.4, 7.5
3.4.2	Organizational planning	7.4, 7.5
3.4.3	Flexibility	
3.5	Implementation	
3.5.1	Implementation in accordance with planning	7.5.1
3.5.2	Participant-oriented design of the learning processes	7.2.1, 7.2.3, 7.5.2
3.5.3	Documentation and control of documents	4.2
3.5.4	Intermediate checks	8.2.3
3.5.5	Problem control and corrections	8.3, 8.5, 7.2.3
3.6	Evaluation, identification of results and interpretation	

No:	Requirement groups and requirements of PAS 1037:2004	Reference to requirements of ISO 9001:2008
3.6.1	Participant statistics	8.4
3.6.2	Success assessment	8.2.1
3.6.3	Success assessment carried out together with the customers	8.4
3.6.4	Saving of experience	8.2.1
3.6.5	Educational enterprises as learning organizations	8.5.1
3.6.6	Creation of business process models	
4	Measuring, analyzing and improving educational processes	
4.1	Surveillances, tests and identification of results	8.1
4.2	Recording and interpretation of customer satisfaction	8.2.1
4.3	Characteristic figures of the educational market	8.2.3, 8.2.4
4.4	Evaluation and internal auditing	8.2.2
4.5	Success analysis	8.4
4.6	Correction and prevention of nonconformities	8.5.2, 8.5.3
4.7	Improvement process, improvement projects	8.5.1, 8.5.2, 8.5.3
4.8	Results related to the staff members	
4.9	Participation and empowerment	
4.10	Society-related results	
4.11	Key results	

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