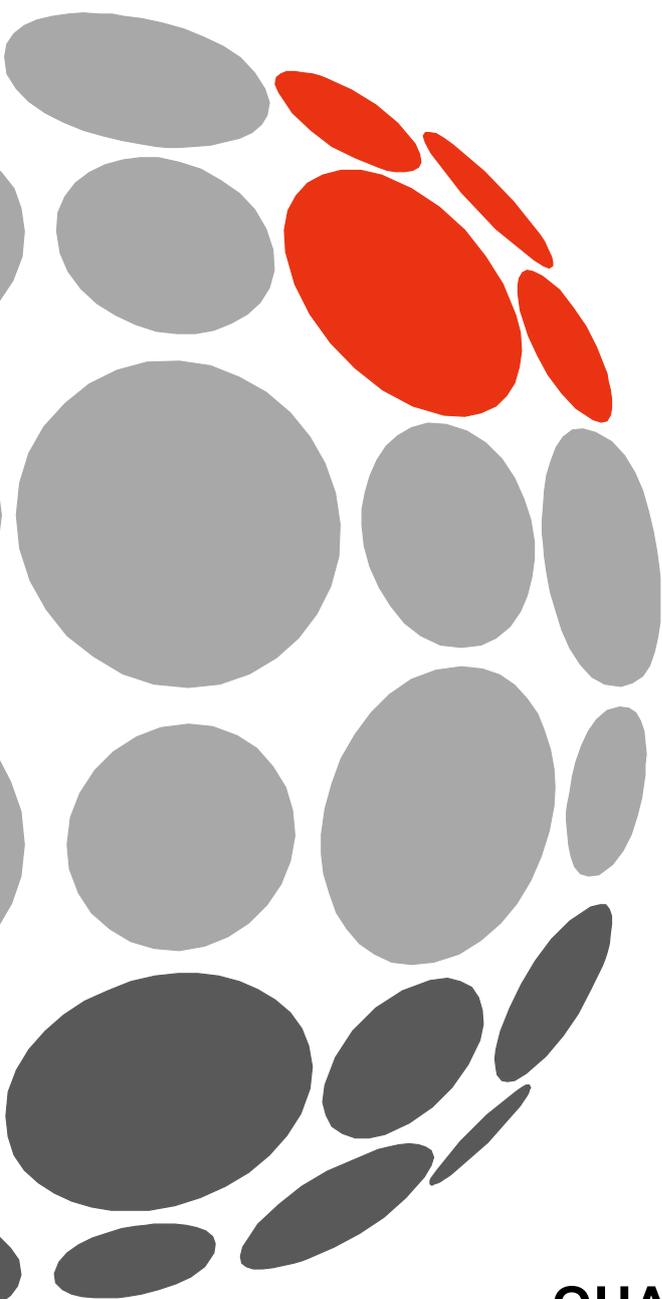


**RKW**  
Berlin



## **QUALITY GUIDELINES**

Recommendations for quality management in transnational education with reference to ISO 29990:2010

“Learning services for non-formal education and training –  
Basic requirements for service providers”

3<sup>rd</sup> revised edition 2012

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## List of Abbreviations

CEFR	Common European Framework of Reference for Languages
CEN	French: Comité Européen de Normalisation English: European Committee for Standardization
CSR	Corporate Social Responsibility
DIN	German Institute for Standardization German: Deutsches Institut für Normung
ECVET	European Credit System for Vocational Education and Training
EFQM	European Foundation for Quality Management
ESF	European Social Fund
EQAVET	European Quality Assurance in Vocational Education and Training
EQF	European Qualifications Framework
EU	European Union
GATS	General Agreement on Trade in Services
ILO	International Labour Organization
ISCED	International Standard Classification of Education
ISO	International Organization for Standardization
LSP	Learning Service Provider
OECD	Organization for Economic Co-operation and Development
PAS	Publicly Available Specification
PDCA	Plan-Do-Check-Act
QM	Quality Management
RAM	Responsibility Assignment Matrix
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
WCAG	Web Content Accessibility Guidelines
WTO	World Trade Organization

## **Preface**

In recent years, the issue of quality and quality assurance in the field of vocational education and training has attracted considerable attention in many countries. The reason for this is a paradigm shift from supplier orientation to demand orientation and the impact of new national and international frameworks. In the scope of their mandates, many international organizations like UNESCO and OECD have focused on quality assurance in the area of education. The World Trade Organization (WTO) declared education as a main topic in the international provision of services in the GATS-round and, in this context, repeated the need for transparency and comparable international standards for learning services. The International Organization for Standardization (ISO) published ISO 29990:2010 as a standard for service providers in the area of non-formal vocational education and training. In addition, the European Union has been intensifying its focus on quality in education since the Copenhagen declaration in 2002. Cooperation on quality assurance with a particular focus on models and methods as well as joint quality criteria has become a top priority. This is reflected in the priorities for LEONARDO DA VINCI pilot projects and the establishment of the European Quality Assurance in Vocational Education and Training (EQAVET), among other measures.

While quality requirements for companies and suppliers of learning services are numerous and diverse, there are still no adequate quality standards or guidelines for the area of international co-operation in education. These QUALITY GUIDELINES are designed to fill this gap. They supplement quality management systems for learning service providers (LSPs) by providing recommendations on quality assurance in the design and management of international relationships between LSPs. The QUALITY GUIDELINES encompass the quality of education and training offered by LSPs working in international partnerships, and the effectiveness of their work as well as their company goals and strategies, their economic viability, and, most importantly, the impact of their services on the learner.

The first version of the QUALITY GUIDELINES was developed as part of a project under the auspices of the Senate Department for Labour, Integration, and Women of Berlin and the Brandenburg Ministry of Labour, Social Affairs, Women, and Family funded by the federal states as well as of the European Social Fund (ESF). The QUALITY GUIDELINES were designed for and in collaboration with LSPs that provide training services through collaboration with international partners. The development work, led by RKW Berlin GmbH, was aided and supported by the creation of networks, bodies of experts, and the piloting by them of the procedures recommended in the Guidelines.

The second edition of the QUALITY GUIDELINES was prepared within a LEONARDO DA VINCI pilot project. The improvements are based on the experiences of the following project partners as they implemented the Guidelines:

Germany:	RKW Berlin GmbH; RKW Brandenburg GmbH; bbw Bildungszentrum Frankfurt (Oder) GmbH; Bergische Universität Wuppertal; Institut für Strukturpolitik und Wirtschaftsförderung gGmbH, Halle; Steinbeis-Hochschule Berlin; Unternehmerverband Brandenburg e.V., Cottbus; Prof. Dr. Wilske und Schliecker Partnerschaft Unternehmens- und Personalberatung, Blankenfelde;
Italy:	Agenzia Formazione Lavoro (AGFOL) s.c., Venedig; GNOSIS s.c., Venedig;
Poland:	Zespół Szkół i Placówek Kształcenia Zawodowego, Zielona Góra; Zespół Szkół Budowlano-Drzewnych, Poznań; Zespół Szkół Odzieżowych im. W. Reymonta, Poznań;
Sweden:	Internationell kompetens AB, Malmö; Krinova Science Park, Krinova;
Spain:	Directorio de Formación (dirfo), Madrid; International House Company Training, Barcelona.

The first and second versions are based on the quality management system QM STAGE MODEL, which was published as PAS 1037:2004 by the Deutsches Institut für Normung (DIN). In this third edition, the recommendations for the quality-based design and conduct of transnational educational partnerships have been adapted to an international standard, ISO 29990:2010 “Learning services for non-formal education and training – Basic requirements for service providers” and further expanded. The link between the QUALITY GUIDELINES and ISO 29990:2010 enhances the guidelines considerably because of the standard specifies internationally agreed criteria for the effective quality management of learning service providers. In addition, ISO 29990:2010 as an international standard is well suited to the international character and scope of the QUALITY GUIDELINES.

This third version was developed as part of a further project sponsored by the Senate Department for Labour, Integration, and Women of Berlin and the Brandenburg Ministry of Labour, Social Affairs, Women, and Family and funded by the federal states as well as the European Social Fund. A new LEONARDO DA VINCI ‘transfer of innovation’ project has the aim of gathering experiences of implementing the Guidelines in different European countries, and is carrying out dissemination activities. The results will be fed into a fourth edition of the QUALITY GUIDELINES, which will be published in mid 2013.

The QUALITY GUIDELINES have been specially developed for and are aimed at anyone involved in international learning services. Good quality management, particularly in a heterogeneous and often dynamically changing international environment, requires learning organizations with critical self-awareness and the active participation of stakeholders in the change processes.

Notes on implementation compiled for the second edition of the QUALITY GUIDELINES are published in a compendium. The compendium contains pointers to typical problems and recommendations for quality development and quality assurance derived from analysis and practical experience in international educational cooperation. It contains a range of methods and tools from management practice as well as useful aids in developing a systematic and target oriented approach. At the core of this compendium is a comprehensive table with further information and additions to the recommendations and guidelines.

The second edition of the QUALITY GUIDELINES is available in German, English, Polish, Italian, Spanish and Catalan. This third edition will also be available in German, and Polish by mid 2012. The compendium for the second edition of the QUALITY GUIDELINES is available in German, English, and Polish. An improved edition of the compendium adapted to the revised QUALITY GUIDELINES will be prepared in parallel to the fourth edition of the QUALITY GUIDELINES. The documents are available for download at:

[www.inquavet.de](http://www.inquavet.de); [www.leonardo-tqp.eu](http://www.leonardo-tqp.eu); [www.quag.eu](http://www.quag.eu); and [www.adam-europe.eu](http://www.adam-europe.eu).

In addition to the QUALITY GUIDELINES, RKW Berlin provides a tool for evaluating learning services provided internationally, which is downloadable at [www.inquavet.de](http://www.inquavet.de). The **iQcheck** defines requirements these educational services should meet and facilitates comparison of different types of provision. It encourages the use of agreed, accepted and transparent criteria for learning services in international competition, and thus provides a benchmark for international quality products in education and indicates what needs to be regulated in training centres in order to make transnational learning services effective.

This edition of the QUALITY GUIDELINES is divided into six chapters. the first, describes the objectives of the QUALITY GUIDELINES. Then their scope is defined in chapter 2, and. the forms of transnational education mentioned in the scope are explained in detail in chapter 3. In addition to national legislation and practices in international cooperation in education, the principles are crucial and these are addressed in chapter 4. Intercultural competencies have a central position in the planning and implementation of transnational learning services. These are dealt with in detail in chapter 5. The final chapter is the main part of the QUALITY GUIDELINES. It contains a detailed table of specific recommendations for quality management in transnational co-operation in education.

We would like to thank everyone involved in the projects for their dedicated participation. The authors will continue to work on the topic of quality in the international exchange of training services. We would be grateful for any constructive criticism and further comments.

## 1 Goals

Coping with education requirements has become a key issue in economic development. Most countries are experiencing an increase in the demand for services in the field of education, especially as regards vocational training and career-related courses. This is happening against a background of ever-increasing demand for knowledge and a recognition of the need for life-long learning, which in turn underscores the growing importance of international cooperation to ensure cost-effectiveness and variety, not to mention the quality of educational provision.

International education and the cross-border mobility of providers require quality assurance procedures and systems similar to those used in basic and advanced training. The existing quality management systems used in educational institutions, such as ISO 9001:2000, ISO 29990:2010, the EFQM model, and the QM STAGE MODEL (PAS 1037:2004), contain no requirements relating to the international activities of learning service providers.

The third edition of the QUALITY GUIDELINES is designed to supplement ISO 29990:2010 by providing orientations to and recommendations for a more quality-based design of international educational activities. The Guidelines cover, on the one hand, processes and, on the other, structures and educational services. They will encourage transparency among national and international providers who follow the recommendations. International education implies going beyond cultural, linguistic, and legislative boundaries as well as national and even continental borders. It is often very complex to adapt and harmonise different systems based on different assumptions and points of reference. Improved intercultural competences, transparency of educational offers, processes, and results, as well as accepted minimum standards, help providers to design and deliver more effective transnational education services.

These QUALITY GUIDELINES:

- are designed to improve the learning-oriented framework for international educational cooperation and to provide a solid basis for mutual trust, thus contributing to greater harmony in European education systems;
- are intended to ensure that a proper balance is achieved between the legitimate interests of the parties involved in transnational educational cooperation;
- supplement ISO 29990:2010 to provide a frame of reference for quality assurance in international education projects and ventures;
- contribute to consumer protection for learners, employers, and other interested parties by promoting transparency and clarity in educational provision as well as the wider recognition of skills and qualifications; and
- promote transnational cooperation in vocational education by helping to remove obstacles to vocational and geographic mobility and opening access to life-long learning.

## 2 Application Area

The QUALITY GUIDELINES are mainly applicable to commercial institutions in the private sector and those in the public sector whose education offers compete with those of private institutions. The QUALITY GUIDELINES are also useful for other educational institutions, but they may require some adjustment.

For the purposes of the QUALITY GUIDELINES, ‘transnational educational processes’ are defined as the management, support, and value-added processes used in providing the following international education services:<sup>1</sup>

- export of education as a cross-border service (e.g. e-learning, virtual and distance education, media, courses, and training materials);
- learning services offered to residents of other countries (e.g. target-group-specific courses for foreigners, study trips, language training, often partly combined with tourism);
- learning services offered abroad using teachers from the sending country or local staff (e.g. education offers from subsidiaries or foreign branches; non-formal higher education; distance education & training; blended learning; training courses; coaching; workshops; specialised seminars; and private tutors);
- international educational cooperation abroad (e.g. cooperation in the country of the cooperation partner or in other countries, joint ventures, franchises); and
- international cross-border educational collaboration (e.g. cooperation on the development of educational products and use of resources e.g. cross-border group training, cooperation agreements, twinning).

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<sup>1</sup> This breakdown is based on the list of international education services used by the World Trade Organization (WTO).

### **3 Forms of Transnational Education<sup>2</sup>**

#### **3.1 Foreign Subsidiary or Foreign Branch**

A subsidiary is a legally independent but financially dependent company that is controlled by a parent company. Generally, the relationship with the parent company is regulated by control/subordination and profit-transfer agreements. Most of the subsidiary's capital usually belongs to the parent company. Hence the foreign branch is legally dependent on and at the same time a component part of the company in the home country.

The specific legal situation in the host country largely determines the advantages and disadvantages of setting up a subsidiary or a foreign branch (e.g. investment protection, liability, conditions governing the provision of educational services etc.).

#### **3.2 Blended Learning**

Blended learning is a type of learning experience which combines the advantages of face-to-face learning and e-learning, and in which different learning methods, media, and theories are combined. Blended learning is a way of organizing learning in which the advantages of various media and methods can be reinforced and any disadvantages minimised by blending them. This concept, also known as "hybrid learning", combines the effectiveness and flexibility of electronic forms of learning with the social aspects of direct human communication.

The pedagogic advantages of using both "traditional" learning and modern forms of e-learning are of particular importance in international education. This generally more structured form of learning is especially useful for specialised courses in which the teaching staff can adjust quickly and at low cost to the syllabus in the country where the teaching takes place. Given the different educational backgrounds of locally appointed teachers, this is an advantage not to be underestimated.

#### **3.3 e-learning**

The term "e-learning" refers to forms of learning in which digital media are used to present and distribute learning materials and/or to support interpersonal communication. e-learning is often a component of more complex forms of teaching and learning (blended learning, distance learning & training, etc.).

Because of its uncomplicated and cost-effective nature, e-learning via the internet is in widespread use as an educational export.

#### **3.4 Distance Learning & Training**

Distance learning & training is organized across distances of time and space based on a properly worked out programme and related learning resources (e.g. print materials,

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<sup>2</sup> The intention of the descriptions in this section is to explain the forms of transnational education services mentioned in chapter 2 and hence the various forms these services take in education. The intention is not to list them all according to their legal structure or the modes of education used in the learning process.

e-learning), together with appropriate guidance and support from the provider (e.g. courses of lectures, seminars, consultation, tutoring, training, often provided on-line or by tele-conference).

In international education, distance learning & training is an advantage since the efficient and cost-effective use of instructional media is reinforced through 'attendance events' without the need for a permanent education organization or teacher presence in the recipient country.

### **3.5 Franchise**

A franchise in the education field involves a franchiser giving an independent franchisee the right to use a business concept, a trademark, training materials etc in a given region in exchange for fees and/or other charges. The learning service is provided within the framework of a uniform marketing concept. The rights and responsibilities of franchisee and franchiser are regulated by contract.

For the franchisee, this form of cooperation means having a share in the knowhow and market profile of the franchiser. For their part, the franchiser has the advantage of rapid market expansion with entrepreneurs taking independent initiatives while still being bound by the franchise agreement. The advantages of an international franchise are in the use of the franchisee's in-country expertise and their contractual obligation to keep the franchiser informed of their activities. The franchiser thus gains experience in an unfamiliar market at low entrepreneurial risk.

### **3.6 Cross-border Group Training**

Group training involves cooperation between companies in the provision of vocational training. The companies in the group complement one another in providing practical vocational training in subject areas where the principal training company is unable to offer training.

Group training in the international context is used in contexts where there is increasing internationalisation of employment and business processes within and between companies (e.g. supplier networks), while also helping to ensure better coordination and networking of publicly provided education offers (e.g. "Learning Region", "INTERREG", "Life-long Learning").

By promoting vocational, social, and intercultural skills and familiarising trainees with a broad spectrum of vocational tasks, group training encourages vocational mobility and flexibility.

### **3.7 Joint Ventures**

These involve the creation of a new, legally independent business unit in which two or more founding companies have capital stakes. Apart from the capital, the founding companies usually contribute a major share of the resources in terms of technology, industrial rights, technical or marketing knowhow and premises. A joint venture usually takes the form of a limited liability company.

In educational cooperation, joint ventures offer the advantage of flexible contractual conditions permitting the pooling of educational knowhow and the use of the local know-

how and distribution channels of the respective business partners. This usually gives rise to a joint interest in the local marketing of education services.

### **3.8 Cooperation Agreements**

Cooperation agreements in transnational education cover agreements in a precisely defined field of education between two or more learning service providers. They regulate the type and nature of the cooperation as well as legal, financial, and other questions connected with it. A cooperation agreement often constitutes the first step towards the creation of a joint company.

A cooperation agreement can cover many forms of cooperation, for example the exchange of teachers and learners, joint development of education products, joint use of resources, study programmes, group training etc.

### **3.9 Twinning Arrangements**

Twining is a concept in which the learning service providers offer learning programmes that learners can work through in their country of residence. At a later stage face-to-face training is provided in the country where the learning service provider is based.<sup>3</sup>

### **3.10 Virtual Education**

In the “virtual classroom” the internet serves as a means of linking learners and teachers who are separated by geography. Virtual learning thus facilitates a synchronous form of distance learning. It is a technology that uses e-learning resources and the communication facilities of the internet (learning portals, video or audio conference systems, e-Twining, etc.). The most frequently used method is the live online course.

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<sup>3</sup> This definition derives from the World Trade Organization’s document S/C/W/49, published on 23 September 1998, on page 7.

## 4 Principles of Cooperation

The key principles of successful cooperation are the mutual respect and benefit of the partners involved as well as a reciprocity that enables the benefits and obligations to be equally shared. In order to develop a form of cooperation that takes into consideration the different education systems and economic frameworks in which the partners work the following principles should be followed:

- (1) The learning service providers respect one another's independence and competence, as well as the national laws and regulations in force in the countries where their cooperation partners are based. They undertake to observe and respect international codes of conduct as defined in the following documents:
  - OECD Principles of Corporate Governance;<sup>4</sup>
  - European Council / UNESCO Code of Conduct for Transnational Corporations;<sup>5</sup>
  - The International Standard ISO 26000:2011, 'Guidance on Social Responsibility'.
- (2) The partners accept the principle of mutual advantage, including:
  - Exchanging knowhow to mutual advantage;
  - Protecting the interests of their partners in cooperation projects, including ensuring legal protection for assets of all kinds;
  - Providing the necessary mutual support and information in the implementation of contracts so as to ensure that the necessary technical requirements and quality standards are met;
  - Exploiting the commercial potential arising from cooperation that is mutually advantageous and complementary.
- (3) Respect for human rights and basic freedoms, including freedom of thought, conscience, religion, or creed. Understanding and respect for all peoples, their cultures, civilisations, values, and ways of life, including native ethnic cultures and cultures of other nations:<sup>6</sup>

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<sup>4</sup> OECD, „Principles of Corporate Governance“, No. 82701 2004, online at: <http://www.oecd.org/dataoecd/32/18/31557724.pdf>.

<sup>5</sup> Council of Europe/UNESCO Code of Good Practice in the Provision of Transnational Education; Council of Europe/UNESCO, 2000.

<sup>6</sup> These are the two UN pacts on civil and political as well as on economic, social and cultural rights, the UN Conventions on Women's Rights, Children's Rights, the Anti-torture Convention, the Convention to Eliminate Racial Discrimination, and the Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families. The ILO core standards, based on the eight core conventions, nos. 29, 87, 91, 105, 128, 182 (recognised as legally binding by 112 of the 177 member states) are the following rights and principles: freedom of assembly and the right to collective bargaining; ban on forced labour; non-discrimination at work; and the ban on child labour.

- Preventing discrimination, and showing respect for and appreciation towards all employees, teachers and learners, irrespective of gender, nationality, ethnicity, colour, age, disability, sexual orientation, religion, political views, or social background;
  - Treating men and women equally and putting in place gender-sensitive working conditions;
  - Respecting cultural conventions and socio-cultural goals and values;
  - Encouraging socio-cultural diversity through positive discrimination.
- (4) Respect for the interests of the country in which the learning services are offered:
- Showing respect for national sovereignty and compliance with national legislation, regulations, and administrative practices;
  - Taking account of national economic priorities and development aims so as to make a lasting contribution to economic, social, and ecological growth;
  - Involving other interested parties in the activities envisaged;
  - Observing national and international standards of consumer protection;
  - Complying with national regulations and international standards in environmental protection
- (5) Bringing about suitable forms and conditions of cooperation with due regard for jointly defined mutual benefits and potential:
- Appointing a contact person for each cooperating partner and making them known to all partners;
  - Guaranteeing regular exchange of information among the partners;
  - Using all the many forms of cooperation that go beyond the framework of conventional cooperation and the exchange of learners;
  - Enhancing mutual knowledge in the relevant economic, scientific, technical, social, legal, cultural and humanitarian fields;
  - Creating lasting ties to ensure long-term comprehensive educational cooperation;
  - Resolving conflicts in a spirit of cooperation to achieve rapid and just outcomes using proven conflict-resolution strategies (e.g. conflict-resolution meetings, arbitration, mediators);
  - Facilitating practical experience in intercultural cooperation for learners and teachers;
  - Providing appropriate working conditions for the staff involved in implementing cooperation projects.
- (6) Preparation of teachers and trainers for instruction in an international environment:
- Motivating them to undertake the work to be done, ensuring that they identify with the objectives and are personally committed to them;

- Developing their ability to appreciate the rich benefits of cultural diversity among individuals, groups, and nations;
  - Imparting knowledge about the various countries and developing teachers' intercultural competency;
  - Providing the language skills needed for negotiation;
  - Providing balanced training in methodological, technical, and social skills;
  - Sensitising people to the problem of equal opportunity and enabling them to find an appropriate response;
  - Encouraging the use of teaching and training methods that are culturally sensitive and that will meet the requirements of life-long learning.
- (7) Harmonisation of standards:
- As harmonisation of standards and the standardisation of certification procedures is an important means of strengthening cooperation ties, thus facilitating the development of cooperation and enhancing its effectiveness, transnational learning service providers should strive for cooperation that meets uniform quality criteria and ideally apply the same quality management standards.
  - Transnational learning service providers should reaffirm their interest in the international harmonisation of standards and do all they can to support the process of international standardisation in the field of education and learning undertaken by the International Organization for Standardization, ISO, and the European Union.

## 5 Intercultural Competencies

Intercultural competencies are acquired “life-history profiles of emotion, cognition, experience, and knowledge acquisition, of thinking, willing, and acting in an intercultural context”.<sup>7</sup> In the course of life, intercultural competencies develop unconsciously as well as consciously. They are shaped by different intercultural experiences, by education and life-long learning and are an integral part of the general competencies of any human being.

In particular, empathy and cultural sensitivity are prerequisites for successful intercultural communication. Training in intercultural competencies is designed to improve people’s ability to successfully interact with those from different cultures and to act appropriately in different intercultural situations. Internally, this applies to multi-cultural groups of colleagues, and externally to every interaction, e.g. with foreign business partners or participants in intercultural learning experiences.

International education should raise learners’ and teachers’ awareness and increase their understanding of the cultures and customs of the participating countries. Teachers should be able to impart their specialised knowledge with due regard for the different cultural traditions of educational socialisation. Designing successful international learning processes requires the development of the following intercultural skills:

(1) Basic understanding of one’s own and the foreign culture:

- Imparting information about the partner country – its values, symbols, history, as well as briefing others on current political, educational, economic and legal issues;
- Creating awareness of the general modes of behaviour in the partner countries, including different concepts of hierarchy, gender roles, and dealing with age and time;
- Creating awareness of one’s own cultural identity and collecting information on the perception of one’s own culture in the partner country.

(2) Communication and action in intercultural situations:

- Proficiency in languages;
- Highlighting and discussing differences in processing information (meta-communication);
- Showing empathy and tolerance of ambiguity<sup>8</sup>;
- Being able to adapt to different styles of communication;
- Being able and willing to create synergies, e.g. when determining learning needs and creating a syllabus for bi-cultural or multicultural target groups;

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<sup>7</sup> Own definition following Horst Siebert (2003): „Didaktisches Handeln in der Erwachsenenbildung“, p. 223.

<sup>8</sup> Tolerance of ambiguity is the ability to recognise contradictions, cultural differences or uncertainty and to deal with the effects of these.

- Being able to deal with different modes of behaviour in relation to hierarchies, gender roles, age, time, and information density;
  - Establishing a positive tone of conversation on first acquaintance;
  - Creating a constructive atmosphere for all concerned to work and talk in;
  - Being able and willing to negotiate with others about task- and problem-related communication styles;
- (3) Intercultural negotiations and conflicts:
- Respecting different negotiating cultures;
  - Acquiring and verifying knowledge of the negotiating partner(s);
  - Taking account of the interests of both sides, seeing problems from the partner's point of view;
  - Reaching agreement on procedures;
  - Being willing in intercultural conflict to:
    - reflect critically on one's own behaviour;
    - let other opinions stand (agree to disagree);
    - involve a mediator with knowledge about other cultures in the negotiation;
  - Demonstrating an ability to deal with conflicts in contexts where the conflict-resolution strategies applied differ from those used in one's own cultural context;
  - Arriving at shared points of view in the course of the negotiation;
  - Using culturally appropriate ways of asking questions;
  - Obtaining feedback and reflecting on the status of negotiations;
  - Looking for alternatives, and overcoming stonewalling tactics in negotiations.

## **6 The QUALITY GUIDELINES: Recommendations**

The QUALITY GUIDELINES provide an extension of ISO 29990:2010. In the table on the following pages, the Guidelines systematically follow the structure of chapters 3 and 4 of this standard. With the exception of Annex A “Business Plan Content”, the other appendices of the standard have not been included because they are not relevant. Annex A, on the other hand, is directly related to requirement 4.2 on strategy and business management.

Due to the fact that the QUALITY GUIDELINES are an extension of the existing Quality Management system ISO 29990:2010, the right-hand column “Recommendations of the QUALITY GUIDELINES” only include provisions which are related to the international aspect of quality management. To facilitate the correlation of these recommendations on international education with the standard, a short description of the relevant requirements of ISO 29990:2010 appear in the left-hand column. The original numbering of the standard has been maintained.

### **Table of contents of the recommendations for the quality-based design of transnational education related to each requirement of the ISO 29990:2010**

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<b>3. Learning services</b>	
<b>3.1 Determining learning needs</b>	
<b>3.1.1 General</b>	
Requirement ISO 29990	Learning needs analysis in order to effectively orient learning services.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Assess educational requirements of international customers with due regard for culture-, country-, and region-specific conditions and requirements.</li> <li>• Acquire and demonstrate knowledge of the target groups, their learning needs, and their country- or region-specific learning conditions.</li> <li>• Acquire and demonstrate knowledge of vocational and advanced training systems in the relevant country.</li> <li>• Take particular account of learning opportunities related to linguistic communication as well as social and cultural interaction.</li> <li>• Create international customer networks.</li> <li>• Take account of the specific conditions and requirements of international co-operation when developing international partnerships and networks.</li> <li>• Ensure continuous collaboration with partners in international co-operation and networks.</li> <li>• Decide whether market communication needs to be adapted to national or regional requirements.</li> </ul>
<b>3.1.2 Needs of interested parties</b>	
Requirement ISO 29990	a) Asking about previous learning experience, qualifications and credentials.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• In qualification analysis, take account of the national economic situation, particularly the labour market and education career paths.</li> <li>• Offer educational counselling on relevant professional qualifications.</li> <li>• Verify the comparability of degrees with due regard for the content and the skill levels required. Work on competencies as far as possible, and do not assess formal qualifications only. Where applicable, use existing international frameworks (e.g. EQF, ISCED, CEFR) to aid the comparison of qualifications.</li> <li>• Where necessary, obtain permission to collect and use the resulting information from the responsible authorities in the</li> </ul>

	relevant country.
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>b) Determination of specific goals, wishes and requirements.</p> <ul style="list-style-type: none"> <li>• Analyse the international demand for the learning services in question.</li> <li>• Identify who the interested parties are taking into account country-specific responsibilities and practices (for instance, the state, a company, or the family may be sponsors of learning services.)</li> <li>• In communications with interested parties take account of their culture as well as the specific modes and customs of communication in their country/region.</li> <li>• Indicate your acceptance of the interested parties' cultural identity and lifestyle.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>c) Supporting the assessment of learning needs and educational goals.</p> <ul style="list-style-type: none"> <li>• Encourage the participants to carry out a realistic self-assessment and to identify and express their own interests, goals, wishes and needs. Support the development and shaping of their personal skills as well as their knowledge of values, taking into account the specific conditions and practices of their culture(s).</li> <li>• Support the specification and assessment of learning needs by the individual student, and provide guidance in determining realistic and verifiable educational goals that take into account relevant cultural considerations.</li> <li>• Show intercultural sensitivity when enquiring about the individual needs of participants.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>d) Determination of individual needs with regard to language, culture, reading and writing skills as well as due to disabilities.</p> <ul style="list-style-type: none"> <li>• In customer management take account of cultural differences in approaching customers and using customer relationship tools, and respect the relevant data protection regulations.</li> <li>• When determining individual needs take account of the special circumstances of being taught in a foreign language.</li> <li>• Where necessary, offer participants technical and linguistic preparation for the qualification process and opportunities to improve their knowledge of foreign languages.</li> </ul>
Requirement ISO 29990	e) Expectations of learning results, of learning transfer, and of the success indicators for this.

Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Identify the relevant interested parties, in particular sponsors and the learners' potential future employers.</li> <li>• Offer advice on learning outcomes, the transfer of usable competencies and indicators of success.</li> <li>• Identify competency-oriented qualification options with due regard for the subsequent likely employment of the learners.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>f) Agreement about the learning service with the sponsor.</p> <ul style="list-style-type: none"> <li>• Draw up a contract that specifies the agreed learning needs taking account of any culture-specific conditions as well as the needs and goals of the sponsor.</li> <li>• During the contract review, take account of differences in legal systems and concepts referring to national and international sources of information about international and civil legislation. Specify all applicable legislation and make any conflicts in legislation apparent to all parties.</li> <li>• In co-operation with the sponsor, determine verifiable and transparent criteria for contract compliance that are clear to all contracting partners.</li> </ul>
<b>3.1.3 Learning content and process</b>	
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>a) That the learning content and learning process take the needs of any interested party into account.</p> <ul style="list-style-type: none"> <li>• Define educational targets, content, extent, resources and methods with due regard for the specific economic, social and cultural conditions of the target country/region.</li> <li>• Ensure that any relevant cultural and other specific characteristics of the target country/region are taken into account.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>b) Target-group-specific planning.</p> <ul style="list-style-type: none"> <li>• Take appropriate account of the specific traditions as well as the communication and behavioural conventions of foreign interested parties.</li> <li>• Clearly define the technical, linguistic and other competencies required to attend a given course, indicating where necessary any age limitations and health requirements.</li> <li>• Take adequate account of equal opportunity-specific needs.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>c) Appropriateness of the learning methods and materials.</p> <ul style="list-style-type: none"> <li>• Plan learning methods and materials with the relevant learning styles in mind and adapt them to the relevant culture(s).</li> <li>• Take full account of the value of previous learning experiences.</li> </ul>

<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>d) Learning content and processes take into account learning results</p> <ul style="list-style-type: none"> <li>• Ensure that qualifications and certificates comply with requirements related to skill levels and the content taught in both the sending and receiving countries.</li> </ul>
<p><b>3.2 Design of the learning services</b></p>	
<p><b>3.2.1 Specification of the aims and scope of the learning services</b></p>	
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>Specification and communication on scope, aims and planned outcomes of learning services and learning methods.</p> <ul style="list-style-type: none"> <li>• Ensure that the proposed transnational learning services comply with the needs of the relevant interested parties, relevant national legislation, and with international norms and customs.</li> <li>• Ensure that learning outcomes are defined, communicated, and later specified in certificates.</li> <li>• Ensure that the educational certificates are informative, striking and clear, and their relation to internationally agreed standards is specified so that they can be more easily assessed by different recognition bodies, educational institutions, employers, etc.</li> <li>• Ensure that certificates include information about the type, duration, content and location(s) of the course, as well as about the language it was delivered in.</li> <li>• Raise staff awareness about international trends and standards in the development and implementation of educational products and services.</li> <li>• For those directly involved in international learning services, specify in a contract rules of conduct regarding <ul style="list-style-type: none"> <li>▪ safeguarding the interests of the participants</li> <li>▪ the quality of the learning service</li> <li>▪ intercultural and equal opportunity-specific issues.</li> </ul> </li> <li>• Prepare contractual agreements on the basis of specimen contracts, taking into account potential different forms of co-operation.</li> <li>• Adapt the contractual framework to the relevant forms of international education (section 3) on a legally binding basis; apply the principles of co-operation set out in section 4 in framing contracts.</li> </ul>
<p><b>3.2.2 Specification of means of supporting and monitoring the transfer of learning</b></p>	
<p>Requirement ISO 29990</p>	<p>Consideration of all relevant interested parties when determining the means of facilitating, supporting, monitoring, evaluating</p>

<p>Recommendation QUALITY GUIDELINES</p>	<p>and documenting the learning transfer.</p> <ul style="list-style-type: none"> <li>• Identify the relevant interested parties for this requirement, and analyse their interests in terms of learning transfer.</li> <li>• Determine the resources for facilitating, supporting, monitoring, evaluating and documenting learning transfer taking into account feasibility, funding and the division of responsibilities in international educational projects.</li> </ul>
<p><b>3.2.3. Curriculum planning</b></p>	
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>a) Develop and document a learning plan and evaluation instruments that are appropriate to the aims and learning outcomes specified.</p> <ul style="list-style-type: none"> <li>• Regularly update the course and adapt it to the needs of the target group.</li> <li>• Check needs and feasibility in accordance with international quality criteria (e.g. ISO, CEN, UNESCO) and the criteria applied by the participating countries.</li> <li>• Pay attention to any requirement for awarding international credits.</li> <li>• Review the learning outcomes using instruments that take account of the requirements and conditions in the target country or countries.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>b) Selection of goal-, requirement- and learner-oriented learning methods.</p> <ul style="list-style-type: none"> <li>• Take account of differences in teaching and learning cultures, as well as in the cultural traditions and customs of the learners.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>c) Clearly specifying rolls and responsibilities when delivering learning services and when monitoring and evaluating learning transfers.</p> <ul style="list-style-type: none"> <li>• Create a Responsibility Assignment Matrix (RAM)<sup>9</sup>.</li> <li>• Make changes in international projects and co-operation arrangements in consultation with the partners and respecting the agreed areas of responsibility.</li> <li>• Ensure that organisational documents reflect the specific conditions of the international commitment.</li> </ul>
<p><b>3.3 Provision of learning services</b></p>	

<sup>9</sup> The Responsibility Assignment Matrix (RAM) describes the participation by various roles in completing tasks or deliverables for a project or business process. It is especially useful in clarifying roles and responsibilities in cross-functional/departmental projects and processes.

<b>3.3.1 Information and orientation</b>	
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	Notification of the learners and the sponsors and checking of the understanding of: <ul style="list-style-type: none"> <li>• Ensure a sensitive approach towards students and sponsors from other cultures. Provide information in the language of the participants or in the agreed language.</li> <li>• Clarify concepts and ideas together with students and sponsors in a well-planned dialogue.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	a) Information in advance on the aims, format and content of the learning services and on the instruments and criteria to be used for evaluation as well as the award to be received upon completion. <ul style="list-style-type: none"> <li>• Provide documentation on the syllabus, the duration of the various courses and the type of certificate awarded for all courses, and make the information available to the participants.</li> <li>• Append this document to the certificate to provide evidence of the comparability of the content with that of similar courses in the home/host country.</li> <li>• Make transparent the differences in the assessment of certificates by professional associations and other relevant entities in the home country and the country in which the training takes place.</li> <li>• Ensure that the content and form of the materials used to promote the LSP to the outside world (in particular its website) comply with its internationalisation strategy (e.g. in terms of languages used, market entry strategy, target groups, decision making, etc.).</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	b) Information in advance on the expected contribution by the learner to learning success. <ul style="list-style-type: none"> <li>• Define clear criteria for the learners' contribution to the success of their learning. Take account of different learning styles and habits as well as cultural differences between the participants.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	c) Information in advance on the LSP's commitments and responsibilities. <ul style="list-style-type: none"> <li>• Inform learners about the contractual details relating to the objectives and the scope of the learning service being provided taking into account national laws and practices as well as, where appropriate, international conventions and standards.</li> </ul>

<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>d) Information in advance on the procedures to be used to resolve problems between interested parties and the LSP</p> <ul style="list-style-type: none"> <li>• In managing any complaints, take appropriate account of the relevant practice and of culture-specific issues in the target country/region.</li> <li>• Ensure a sensitive approach towards different conflict cultures.</li> <li>• Provide the names of individual contact persons.</li> <li>• Develop informal conflict settlement procedures.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>e) Information in advance on learning support.</p> <ul style="list-style-type: none"> <li>• Ensure that suitable support mechanisms are available to: <ul style="list-style-type: none"> <li>▪ help foreign participants to adapt successfully to the new learning and living environment</li> <li>▪ help them to solve problems that might impede their progress</li> <li>▪ provide information about daily life and advice on taking adequate precautions.</li> </ul> </li> <li>• Ensure that the learners know how to use the relevant learning resources.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>f) Information in advance on evaluation methods and plans</p> <ul style="list-style-type: none"> <li>• Ensure that the participants understand the aims and the procedure for evaluation and assessment.</li> <li>• Ensure that the participants are informed about their rights (e.g. data protection, access to the results of the evaluation).</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>g) Information in advance on technical or other prerequisites.</p> <ul style="list-style-type: none"> <li>• Make an assessment of the language and other skills required to understand the content of the learning programme.</li> <li>• Provide support to enable participants to learn the language and other relevant skills before and during the learning service.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>Information about costs provided in advance to those who will finance the service.</p> <ul style="list-style-type: none"> <li>• Adapt methods of payment to country-specific practices and ensure that <ul style="list-style-type: none"> <li>▪ prices are available in the local currency,</li> <li>▪ additional costs (e.g. customs, exchange charges) are specified,</li> <li>▪ locally convenient payment methods (e.g. credit card, bank transfer) are offered and</li> <li>▪ bank charges are taken into account.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>• Provide information about possible sources of financial support.</li> </ul>
<b>3.3.2 Ensuring availability and accessibility of learning resources</b>	
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>a) Availability of all resources anticipated in the curriculum.</p> <ul style="list-style-type: none"> <li>• Pay adequate attention to the special requirements of the activities planned to prepare the educational organization to cope with the international environment, national laws and regulations of the host countries and international standards.</li> <li>• Plan personnel, material and financial resources and provide them on time taking into account additional expenditure arising from international activities.</li> <li>• Provide an appropriate IT infrastructure for transnational communication.</li> <li>• Ensure that the educational organization's local infrastructure is sufficient to deliver quality-based education.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>b) Usability of learning resources.</p> <ul style="list-style-type: none"> <li>• Ensure that teaching staff use learning resources appropriately and competently.</li> <li>• If feasible teachers and students should use learning resources in the same language, or it should be ensured that appropriate communication is possible.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>c) Accessibility of resources by learners</p> <ul style="list-style-type: none"> <li>• When providing learning resources take account of local conditions (e.g. infrastructure, climatic conditions, country-specific practices).</li> <li>• Ensure that participants are able to cope with the learning resources (e.g. country-specific keyboard layout) and provide manuals in the language of the participants or the agreed language.</li> </ul>
<b>3.3.3 The learning environment</b>	
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>Ensure the suitability of the learning environment.</p> <ul style="list-style-type: none"> <li>• Gather information about the country's learning and work culture and, where possible, take these into account in the design of the learning environment. This is to create trust and to reduce inefficiency caused by changes in learning habits.</li> <li>• When participating on-site in transnational learning services ensure that the facility in which the learning takes place is suitable.</li> </ul>

	<ul style="list-style-type: none"> <li>• Provide adequate logistical support when organising study visits.</li> <li>• Help foreign participants, especially those with special needs, to adapt to the new learning and living environment. Provide information on daily life and advice on taking relevant precautions.</li> <li>• Take adequate account of culture-specific habits (e.g. eating and drinking habits, particularly in non-European cultures).</li> </ul>
<b>3.4 Monitoring the delivery of the learning services</b>	
Requirement ISO 29990	Collection of feedback from learners on the methods and resources used and their effectiveness in reaching learning results agreed.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Where necessary, plan and carry out spot checks and feedback activities in consultation with teachers.</li> <li>• Adapt the methodology and the pace of teaching to local learning styles and habits with due regard for cultural features, and ask for feedback sensitively. (e.g. adaptation through a change of methods, flexible interviewing techniques, etc.)</li> </ul>
<b>3.5 Evaluation carried out by learning service providers</b>	
<b>3.5.1 Evaluation goals and scope</b>	
Requirement ISO 29990	a) Description of the goals and scope of the evaluation.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Show that evaluation of the results of the internationalisation process is an important indicator of the overall success of the educational organization, and check whether the cultural adjustments made were effective.</li> </ul>
Requirement ISO 29990	b) Ensuring the documenting of evaluation methods and instruments.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Consider feasibility issues when selecting evaluation methods and instruments in international contexts. If possible, ensure that contact with participants is maintained after completion of the learning service.</li> <li>• Ensure that jointly developed criteria and procedures are used when reporting the results of evaluations.</li> <li>• Ensure that the results of personal evaluation are communicated to the participants in an appropriate form.</li> </ul>
Requirement ISO 29990	c) Goal-appropriate planning, selection and delivery of evaluation process.
Recommendation	<ul style="list-style-type: none"> <li>• Develop and agree evaluation procedures together with the participating partners, and use internationally recognized</li> </ul>

QUALITY GUIDELINES	<p>methods of assessment.</p> <ul style="list-style-type: none"> <li>• Check that the recognition of educational qualifications is based on the course content as described and the certificates that have been issued.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>d) Ensure compliance with legal and ethical standards.</p> <ul style="list-style-type: none"> <li>• Investigate and consider culturally appropriate means of collecting, analysing and using evaluation data.</li> <li>• See also the principles of international co-operation in section 4.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>e) Ensuring the quality of the data:</p> <ol style="list-style-type: none"> <li>1. Fit for purpose and sufficiently comprehensive;</li> <li>2. Systematic and precise analysis;</li> <li>3. Valid, reliable and sufficiently meaningful.</li> </ol> <ul style="list-style-type: none"> <li>• Ensure that evaluations are internationally comparable, and provide evidence for this.</li> <li>• Take account of any differences there may be in national requirements relating to the presentation of statistics on participants.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>Measures for the reduction of bias in evaluations.</p> <ul style="list-style-type: none"> <li>• The evaluation should take into account the different views of the stakeholders concerning the evaluand and the evaluation findings. Similar to the entire evaluation process, the evaluation report should evidence the impartial position of the evaluation team. Value judgments should be made as unemotionally as possible.</li> </ul> <p>(See DeGEval – Gesellschaft für Evaluation e.V. (2008) (Hg.): Standards für Evaluation, 4. unrevised edition. Mainz: page 12, translation by Wolfgang Beywl.)</p>
<b>3.5.2 Evaluation of learning</b>	
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	<p>a) Data protection for results of learning progress evaluations and comparability of data.</p> <ul style="list-style-type: none"> <li>• Take account of country-specific legislation.</li> <li>• Note that the presentation of data may need to be anonymous.</li> <li>• Comply with the principles on the presentation and use of statistics provided in international agreements and standards (e.g. the Fundamental Principles of Official Statistics of the United Nations). Refer to ISCED, ECVET, EQF and other national and international qualification frameworks if appropriate.</li> </ul>

Requirement ISO 29990	b) Evaluation of people with difficulties and those who need specific assistance.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>Identify and, when necessary, cooperate with experts in the target country/region.</li> </ul>
<b>3.5.3 Evaluation of the learning service</b>	
Requirement ISO 29990	a) Identification of interested parties involved in or affected by the evaluation.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>Identify the interested parties involved in the evaluation and those affected by it, taking into account country-specific responsibilities and practices.</li> </ul>
Requirement ISO 29990	b) Competence and objectivity of evaluators ensured.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>Ensure that the evaluators have appropriate levels of intercultural competence.</li> </ul>
Requirement ISO 29990	c) Clarity and transparency when describing the learning service in evaluation reports, their goals, results as well as expectations, methods and rationale that will be used in interpreting the results.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>Develop and apply indicators that are applicable to international education.</li> <li>Take account of any country-specific requirements that need to be met by these indicators</li> <li>Ensure that the key indicators are as comparable as possible at the international level.</li> </ul>
Requirement ISO 29990	d) Considering the context of the evaluation
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>Incorporate the requirements of internationalisation in the evaluation of the educational provision.</li> <li>Apply international methods of evaluation, or ensure that those used are accepted in the participating countries.</li> </ul>
<b>4 Management of the learning service provider</b>	
<b>4.1 General management requirements</b>	
Requirement ISO 29990	A commitment to this international standard shall be demonstrated at the highest level of leadership within the LSP.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>In implementing the vision of internationalisation and intercultural approaches and principles, senior management should lead by example.</li> <li>Senior management should ensure that an intercultural approach is adopted throughout the organization.</li> </ul>

	<ul style="list-style-type: none"> <li>• Senior management should show a commitment to ISO 29990:2010 at all company locations.</li> </ul>
Requirement ISO 29990	Establishment and documentation of a management system as well as responsibility for the system
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• The person responsible for the management system should ensure that the management system is implemented at all locations.</li> </ul>
Requirement ISO 29990	Documentation of the application of and compliance with ISO 29990
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Provide documents and data in the languages of the participating partners or in the agreed language.</li> <li>• Provide quality-related documents and data for the teaching and other staff who are responsible for providing learning services at the respective foreign locations.</li> <li>• In providing documentation, take account of multilingual requirements as well as of international standards, legislation, and customs.</li> </ul>
Requirement ISO 29990	Procedure for the retention of records.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Ensure that the required data is available at the different foreign locations. State-of-the-art electronic communication and documentation platforms should be set up for this purpose.</li> <li>• Ensure that the necessary quality assurance mechanisms are also in place at foreign locations.</li> </ul>
<b>4.2 Strategy and business management</b>	
Requirement ISO 29990	Business plan in accordance with generally accepted business planning practices to be drawn up and documented.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• The strategic objectives pursued, for example: <ul style="list-style-type: none"> <li>▪ the internationalisation of the organization,</li> <li>▪ strategic opening up of international markets, and</li> <li>▪ developing international co-operation</li> </ul> <p>should be backed up by appropriate documentation such as market surveys, the planning of the business segments (especially from the point of view of cost-effectiveness), and product life cycles etc.</p> </li> <li>• Document the progress made in internationalising the educational organization.</li> <li>• Ensure that documents on workflow and on international commitments are clear and available to international partners.</li> </ul>

## Annex A Business plan content

A business plan usually covers the following areas

<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>a) Vision and mission.</p> <ul style="list-style-type: none"> <li>• Make the internationalisation of the organization a guiding principle, in particular as regards the development of intercultural competencies and equal opportunity-specific objectives.</li> <li>• Understand and capitalise on the potential of cultural diversity for generating greater synergies. Involve teachers in the internationalisation of the educational organization according to their specific individual experience and competencies.</li> <li>• When developing performance management criteria for staff include criteria that are country-specific.</li> <li>• Take account of the need to cooperate with international partners in developing performance management criteria.</li> <li>• Seek public acknowledgement of the LSP's international activities.</li> <li>• Ensure that demonstrable contributions are made to international co-operation and, where applicable, to common projects focusing on the development of new services.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>b) Development and regular assessment of the strategy.</p> <ul style="list-style-type: none"> <li>• When agreeing international co-operation objectives ensure that strategies to be adopted are jointly developed.</li> <li>• When defining educational strategies take account of European education and quality objectives, or in the case of non-European co-operation, the objectives of UNESCO and other relevant organizations.</li> <li>• Identify and take account of key indicators for international educational work.</li> <li>• Develop and evaluate flexible options for market entry, then decide on a market entry strategy that is compatible with the LSP's internationalisation strategy.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>c) Quality policy and policy for quality steering.</p> <ul style="list-style-type: none"> <li>• Develop a quality policy for the field of vocational and advanced training, taking account of European and international education criteria and standards.</li> <li>• Make the mission statement and the quality policy publicly available.</li> <li>• Develop quality indicators for international co-operation.</li> <li>• Ensure that the same quality standards are used in all the</li> </ul>

	<p>LSP's domestic and foreign educational operations. Where there are variations these should be highlighted.</p> <ul style="list-style-type: none"> <li>• Ensure that external quality assurance in each branch is carried out by the same organization(s).</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>d) Business and quality objectives.</p> <ul style="list-style-type: none"> <li>• Define clear and verifiable objectives for internationalising the organization, making sure that these objectives apply to specific forms of international learning services.</li> <li>• In formulating company and quality objectives, take account of international objectives for vocational and advanced training, such as those formulated by the European Union</li> <li>• Adapt company and quality objectives to international education requirements and ensure that key indicators are used to verify whether the objectives have been achieved.</li> <li>• When defining international quality objectives take relevant cultural and linguistic issues into account.</li> <li>• Specify objectives for each region, country, and/or market.</li> <li>• Take account of equal opportunity-specific development goals.</li> </ul>
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>e) Market analysis</p> <ul style="list-style-type: none"> <li>• Identify and analyse possible target countries on the basis of the cost of market entry, learning needs and growth, competition, prices or margins, market risks, and the potential for innovation.</li> <li>• Ensure the international marketability of educational products and services.</li> <li>• Identify appropriate comparative indicators for sector-related, regional, national and international assessments of the educational market.</li> <li>• Use comparative indicators that are in current international use so long as they are relevant to the comparisons being made.</li> </ul>
<p>Requirement ISO 29990</p>	<p>f) Organization and operational structure, including business areas and cooperations.</p>

<p>Recommendation QUALITY GUIDELINES</p>	<ul style="list-style-type: none"> <li>• Consider internationalisation as part of a business process model.</li> <li>• Ensure appropriate participation by men and women in international co-operation.</li> <li>• Adapt the organisational structure to the requirements of international learning services.</li> <li>• Specify clearly the areas of responsibility involved in internationalising the organization.</li> <li>• Reach agreement on the rules that will be used to govern intercultural teamwork during international educational projects.</li> <li>• Specify clearly the tasks of teachers in relation to the internationalisation of the educational organization.</li> <li>• Actively involve teachers in customer acquisition and the development of new international educational products.</li> <li>• Define areas of employee competency taking into account the objectives and tasks implied by the process of internationalising the LSP.</li> </ul>
<p>Requirement ISO 29990  Recommendation QUALITY GUIDELINES</p>	<p>g) Identification and design of key processes.</p> <ul style="list-style-type: none"> <li>• Ensure an exchange of experience between the partners in international educational co-operation as a means of identifying and shaping key processes.</li> <li>• Initiate joint reflection on the specific learning and educational processes required in international co-operation, and the challenges and opportunities they entail in relation to the current project.</li> <li>• Ensure that there is reflection on and training in teaching and learning methods that are culturally appropriate for the target group.</li> </ul>
<p>Requirement ISO 29990  Recommendation QUALITY GUIDELINES</p>	<p>h) Associates.</p> <ul style="list-style-type: none"> <li>• Consider the need for close co-ordination with international partners.</li> <li>• Take account of the legal, economic, social and cultural conditions of associates abroad.</li> </ul>
<p><b>4.3 Management review</b></p>	
<p>Requirement ISO 29990</p>	<p>Management review at planned intervals.</p>

Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Develop internationally appropriate procedures to review the management system.</li> <li>• Involve subsidiaries and activities abroad as well as multilateral partnerships in the review.</li> </ul>
<b>4.4 Preventive actions and corrective actions</b>	
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>The section includes 4 requirements which are closely connected to each other:</p> <ul style="list-style-type: none"> <li>▪ set up procedures for recognizing and for dealing with nonconformities in the management system;</li> <li>▪ measures for the elimination of the causes of nonconformities;</li> <li>▪ preventive measures to abolish potential nonconformities;</li> <li>▪ Corrective measures in an adequate relation to the consequence of the discovered problems.</li> </ul> <ul style="list-style-type: none"> <li>• Create and exploit conditions for a flexible response to changes in the international business.</li> <li>• Define the scope for discretion for all participating partners.</li> <li>• Base change management on the indicators relating to the international design of the vocational and advanced training courses.</li> <li>• Manage the correction and prevention of nonconformities in transnational activities in collaboration with all international partners.</li> </ul>
<b>4.5 Financial management and risk management</b>	
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>a) The LSP must design, implement and document an appropriate system for financial management in order to ensure business continuity.</p> <ul style="list-style-type: none"> <li>• Agree on joint indicators and key figures for co-operation with due regard for national and international reporting obligations.</li> <li>• Develop a specific control system for international co-operation.</li> <li>• Use a permanent and open process of reflection as a desirable component of co-operation.</li> <li>• Give an exact breakdown of the financial implications of internationalising the educational organization.</li> </ul>
Requirement ISO 29990	<p>b) The LSP must design, implement and document a system for risk management in order to ensure business continuity.</p>

<p>Recommendation QUALITY GUIDELINES</p>	<ul style="list-style-type: none"> <li>• Take appropriate account of and document the risks involved in international transactions as well as country-specific risks (e.g. based on analyses of <i>Business Environment Risk Intelligence</i><sup>10</sup>).</li> </ul>
<p><b>4.6 Human resources management</b></p>	
<p><b>4.6.1 Competencies of the LSP's staff and associates</b></p>	
<p>Requirement ISO 29990</p> <p>Recommendation QUALITY GUIDELINES</p>	<p>The LSP must ensure that all staff and associates have the competencies necessary to deliver the services and fulfil their responsibilities for the management system.</p> <ul style="list-style-type: none"> <li>• Differentiate objectives for personnel development according to the special requirements of the foreign activities planned.</li> <li>• Create awareness of international activities as a separate sphere of responsibility and an integral part of the service provision of the educational organization.</li> <li>• Prepare staff systematically for the specific requirements of internationalisation, particularly to enable them to cope with the process dynamics of intercultural learning situations.</li> <li>• In order to internationalise the educational organization, train staff in intercultural competencies according to the principles of co-operation outlined in section 5, and provide training towards a business fluent competence in foreign languages. Establish procedures to reassess staff on a regular basis.</li> <li>• Use intercultural competencies as a criterion for selecting and evaluating teaching staff, and differentiate the competencies according to the specific requirements of the planned activities within the LSP's internationalisation process.</li> <li>• Acquire specific knowledge and experience of the target culture(s).</li> <li>• Require staff involved to be internationally mobile.</li> <li>• Create an international competency matrix for teaching staff, taking account of the educational and working culture of the target country/region. Include in the matrix particularly: <ul style="list-style-type: none"> <li>▪ Professional competencies (life skills, country- and culture-specific knowledge),</li> <li>▪ Social skills (empathy, communicative skills, verbal skills and the ability to work in an intercultural team) and</li> <li>▪ Personal competencies (e.g. self-awareness in intercultural contexts).</li> </ul> </li> </ul>

<sup>10</sup> The Business Environment Risk Intelligence is the private source for comprehensive ratings, analyses, and forecasts for over 140 countries. It provides political and economic risk analysis utilising quantitative analysis and scenario assessments.

	<ul style="list-style-type: none"> <li>• Ensure that all those involved apply the same quality standards in relation to transnational educational institutions and their teaching staff.</li> <li>• Ensure that international staff have the multicultural and equal opportunity-appropriate work arrangements that they need.</li> <li>• Standardise assessment criteria.</li> <li>• Ensure the commitment and continuity of personnel.</li> <li>• Use the positive results of international co-operation as examples of good practice.</li> <li>• Develop the ability to recognise equal opportunity-related and other bias in learning materials and situations as well as the ability to develop an appropriate response in an intercultural environment.</li> </ul>
<b>4.6.2 Evaluation of LSP competencies, performance management, and professional development</b>	
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>a) Assess, evaluate and document the competencies for each employee in relation to the job description.</p> <ul style="list-style-type: none"> <li>• Agree on specific objectives and tasks when developing staff competencies to aid the internationalisation of the educational organization.</li> <li>• Use the experience that staff gain from international educational co-operation for the systematic development of competencies.</li> <li>• Take account of international experience in the required profiles of teaching staff.</li> <li>• In evaluating employees include indicators related to intercultural and equal opportunity-related competencies</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>b) Collecting and evaluating feedback on the competencies and performances.</p> <ul style="list-style-type: none"> <li>• In carrying out the evaluation consider cultural differences in approaches to assessment.</li> </ul>
Requirement ISO 29990  Recommendation QUALITY GUIDELINES	<p>c) Obtaining feedback from staff and associates on their motivation and job satisfaction</p> <ul style="list-style-type: none"> <li>• Promote acceptance of the internationalisation of the educational organization among all employees; motivate them to support this objective and ask for feedback on this matter.</li> <li>• Motivate teaching and other staff to become involved in international educational co-operation taking into account the additional competency requirements.</li> </ul>

Requirement ISO 29990	d) Continuous professional development and its evaluation and documentation.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Provide support for professional development, in particular the development of intercultural and language competencies.</li> </ul>
Requirement ISO 29990	e) Evaluation of team competency.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Include all parties involved in the implementation of learning services in the evaluation.</li> <li>• Take particular account of conflict resolution and intercultural competencies in the evaluation.</li> </ul>
Requirement ISO 29990	f) Observance of legislative and general standards
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Take account of international and country-specific legislation and standards.</li> </ul>
<b>4.7 Communication management (internal/external)</b>	
Requirement ISO 29990	Facilitating two-way-communication on all issues which may have a direct impact on staff members and associates.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• When engaging in formal and informal communication, take full account of the culture and communication styles of the target country/region.</li> <li>• Regulate formal communication and adapt it to international standards.</li> <li>• Provide the means and facilities for informal communication among staff that is open, international and intercultural.</li> <li>• Hold international working staff meetings and establish personal contacts.</li> <li>• Adapt to different cultural habits and identify an acceptable as well as results-driven way of working (e.g. set fixed times and agendas for meetings; document the outcomes in minutes).</li> <li>• Promote the setting up of international networks and exchanges of experiences between teachers (e.g. through EU programmes).</li> </ul>
<b>4.8 Allocation of resources</b>	
Requirement ISO 29990	Deployment of staff and learning resources adapted to the needs.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"> <li>• Define the requisite resources in accordance with the learning needs of the target country / region, and in line with international standards of vocational training.</li> </ul>

	<ul style="list-style-type: none"> <li>• Plan resources for the internationalisation of the organization with due regard for peculiar features of “return on investment” in international business.</li> <li>• Take account of diversity aspects in planning resources, especially with regard to cross-border mobility requirements and differences in the assignment of female teaching staff.</li> </ul>
<b>4.9 Internal audits</b>	
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	Determining a procedure for internal audits <ul style="list-style-type: none"> <li>• The audit procedures should also apply to locations abroad. If necessary, the procedures can be adapted for given locations.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	Taking into account relevant processes and areas as well as previous audits. <ul style="list-style-type: none"> <li>• Take responsibility for quality assurance and quality control both at the educational institutions abroad and at those in the home country.</li> <li>• Define the areas of responsibility for the quality management system and internal auditing.</li> <li>• Provide information for auditors on the quality of the programmes offered by the education provider at home and abroad.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	a) Conduction by suitably qualified persons. <ul style="list-style-type: none"> <li>• If necessary, train internal auditors at foreign locations or deploy internal auditors from the home country abroad.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	b) Auditors do not audit their own work.
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	c) The responsible staff is informed of the audit’s outcome. <ul style="list-style-type: none"> <li>• Ensure employees at foreign locations have access to information on the relevant outcomes.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	d) Identification of opportunities for improvement. <ul style="list-style-type: none"> <li>• Include the foreign locations in the continuous process of quality improvement.</li> </ul>
Requirement ISO 29990 Recommendation QUALITY GUIDELINES	e) Dealing with results appropriately. <ul style="list-style-type: none"> <li>• When implementing suggestions for improvement, take account of issues identified at other locations, particularly</li> </ul>

those abroad.

#### **4.10 Feedback from interested parties**

Requirement ISO 29990	Collect feedback, give answers and react if necessary
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"><li>• Develop a joint understanding of criteria and standards for customer satisfaction.</li><li>• Take account of country-specific factors in the evaluations of interested parties.</li><li>• Define and demonstrate a methodology for measuring customer satisfaction, including that of foreign customers.</li><li>• Implement an internationally agreed change management procedure.</li></ul>
Requirement ISO 29990	Process for handling complaints and appeals.
Recommendation QUALITY GUIDELINES	<ul style="list-style-type: none"><li>• Develop a system for handling complaints and appeals, taking into account cultural features (e.g. with regard to cultures in which complaints are not made openly).</li><li>• Provide interested parties with information about procedures for making complaints and, if necessary, help them to use them.</li></ul>