

Key Success Factors for Cross-Border Education

Prof Dr Mansor Fadzil
Senior Vice President
Open University Malaysia
Jalan Tun Ismail, 50480
Kuala Lumpur, MALAYSIA
E-mail: mansor@oum.edu.my

Tengku Amina Munira
Executive, Office of the Senior Vice President
Open University Malaysia
Jalan Tun Ismail, 50480
Kuala Lumpur, MALAYSIA
E-mail: tg_munira@oum.edu.my

Abstract

Of late, higher education the world over has been transformed into an international trade, as barriers in time and space are broken by rapid advancements in technology and the World Wide Web. Universities from different countries and regions now have an even more sound reason to work together in the many areas of higher educational services. As an Open and Distance Learning (ODL) institution, Open University Malaysia (OUM) recognises that engaging in cross-border education is both advantageous and necessary in order to compete at a global scale. This paper will explore the potential areas for cross-border education, discuss key success factors as experienced by OUM and also deliberate on present issues and the way forward for collaborations between universities. Key success factors encompass different aspects of a collaboration, including bilateral relations, local partners, products, people as well as planning and execution. Related concerns include recognition and accreditation, cost and affordability, sustainability and developing the appropriate business model. Managing each other's expectations and ensuring the success of the collaboration also requires a human touch and a sense of continuity.

I. INTRODUCTION

It is a well-accepted maxim that education is a business. And like many other businesses, education today is 'going global'. Through globalisation and with the aid of information and communication technologies (ICTs), education providers, particularly institutions of higher learning, have begun to embrace partnerships, collaborations and other such efforts geared towards a solid international presence. And this phenomenon similarly affects practitioners in open and distance learning (ODL) as it does with other types of universities.

Generally, internationalisation in higher education is a trend that has manifested itself in the form of academic partnerships and collaborations between universities and like providers. Such partnerships are borne through the provision of higher educational services between different institutions and countries. As spatial and temporal lines are blurred, mainly with the aid of technology and the World Wide Web, many universities have come to realise that collaborating is a functional, lucrative and practical way to build and sustain business relationships between one another. Coupled with ever-increasing demand for access and the proliferation of the knowledge-based workforce, this has perhaps convinced universities even more that collaborations can serve as a *quid pro quo* business opportunity.

Open University Malaysia (OUM) is Malaysia's premier ODL provider and has been operating for the past seven years. In this relatively short time, OUM has made internationalisation a focal point in its operations. Through the signing of various memoranda, OUM now has over 30 international partners in countries such as the Kingdom of Bahrain, Egypt, Indonesia, the Maldives, Papua New Guinea, the Kingdom of Saudi Arabia and Vietnam. These partnerships have been forged with the aim of being a global player in the higher education marketplace. These partnerships have also taught us many things about collaborating with foreign counterparts and what cross-border education really signifies.

II. WHAT IS CROSS-BORDER EDUCATION?

Cross-border education can be considered a relatively new phenomenon. One of its best cited definitions is given by the Organisation for Economic Co-operation and Development (OECD) in 2005, i.e.:

“...cross-border education includes higher education that takes place in situations where the teacher, student, programme, institution/provider or course materials cross national jurisdictional borders. Cross-border education may include higher education by public/private and not-for-profit/for-profit providers. It encompasses a wide range of modalities, in a continuum from face-to-face (taking various forms such as students travelling abroad and campuses abroad) to distance learning (using a range of technologies and including e-learning.”

A different definition is also provided by Knight (2006), i.e.:

“Cross-border education refers to the movement of people, programs, providers, knowledge, ideas, projects and services across national boundaries.”

It also often involves collaborative arrangements, sometimes requiring access to technology and is a response of education to globalisation (Daniel, Kanwar & Clarke-Okah, 2006). Through internationalisation, higher education has now become an important export sector; where franchising and licensing production are beginning to turn into foreign direct investment as universities stamp their presence in other countries (Healey, 2008). Healey (2008) also commented that the internationalisation of universities should include ‘transnational education’ as a similar development. Transnational education has thus been defined as:

“All types of higher education programmes and educational services (including distance-learning) in which learners are located in a country different from the one where the awarding body is based.”

(UNESCO/Council of Europe, 2001).

Thus, it is becoming clear that cross-border education, internationalisation and transnational education are involved in the provision of higher education programmes and services to a global clientele of students following a similar pattern to multinational corporations. It is generally acknowledged that internationalisation efforts are driven by growing demand for higher education in the developing world (Daniel, Kanwar & Clarke-Okah, 2006; Healey, 2008; and Knight, 2006). Furthermore, it may also be a response to domestic government policies (Healey, 2008), have commercial purposes (Knight, 2006) or targeted at national capacity development (OECD, 2008). Knight (2006) also opines that cross-border education may signify a horizontal move from development co-operation to competitive commerce, i.e. from aid to trade.

The following statistics (cited in Healey, 2008) are a snapshot of the continued growth in global higher education demand.

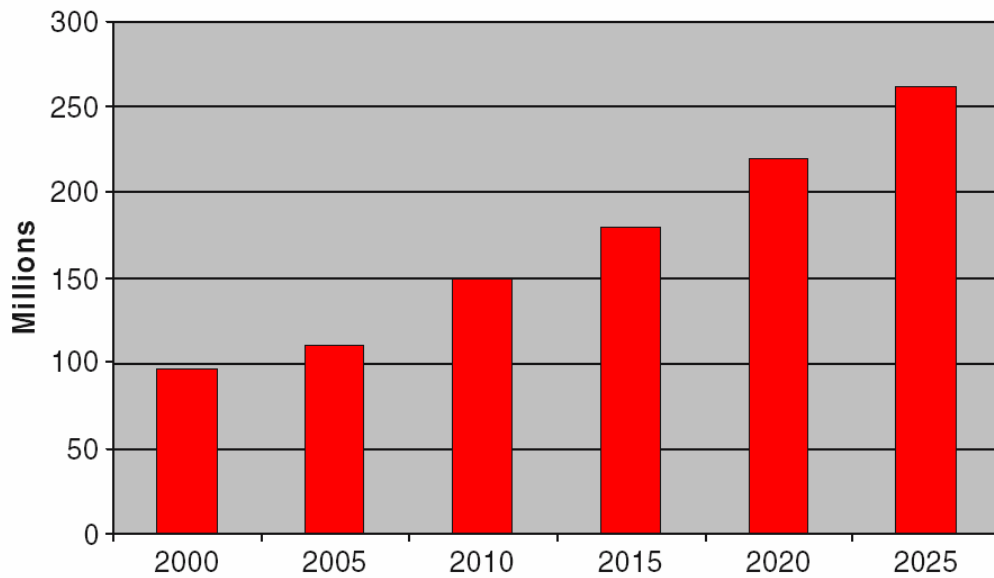


Figure 1. Forecast global demand for higher education.
Source: IDP Australia (2003). Derived from Healey (2008).

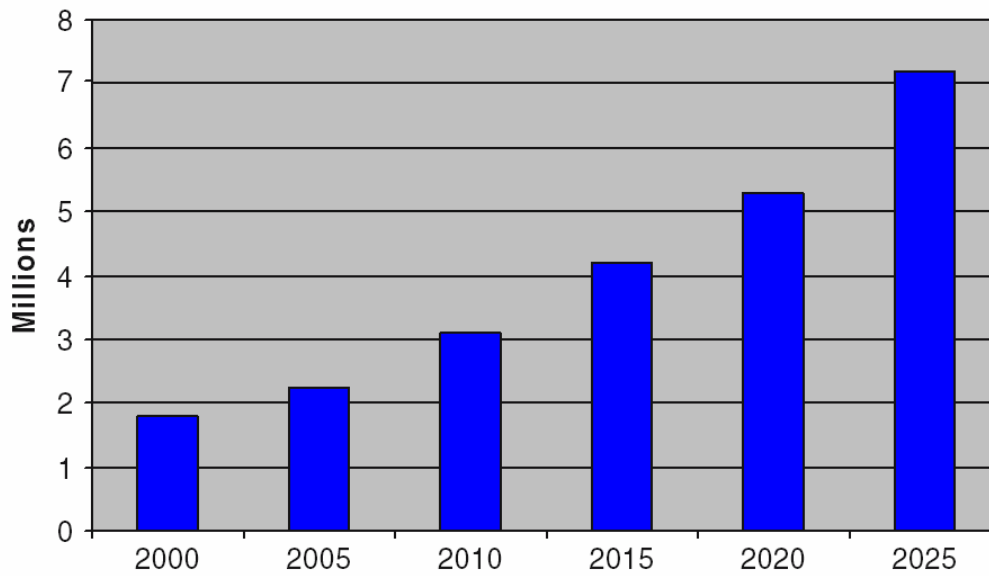


Figure 2. Forecast global demand for international higher education.
Source: IDP Australia (2003). Derived from Healey (2008).

As with many businesses, the internationalisation of higher education follows an incremental process; a sequencing sometimes known as the ‘Uppsala internationalisation model’ (Healey, 2008). The steps in this model are:

1. Exporting;
2. Licensing production;
3. Joint ventures; and
4. Sole ventures.

This model suggests that universities may ‘export’ educational services to foreign students who enrol on their home campuses; ‘franchise’ or sub-contract a local provider in another country to offer academic programmes; establish off-shore production facilities with the involvement of local partners; or wholly-own branch campuses in foreign countries (Healey, 2008).

Cross-border providers are diverse, and generally classified into two categories, i.e. traditional universities and alternative providers who primarily focus on teaching and the delivery of services (Knight, 2006). The latter can include brick-and-mortar institutions or virtual universities that complement, compete, collaborate or simply co-exist with other providers. OECD (2005) also acknowledges that cross-border higher education encompass a wide range of modalities ranging from face-to-face to distance learning.

Mobility in cross-border education can involve students, programmes or the institutions themselves (Knight, 2006). Students, mainly from politically and economically elite backgrounds, have been going abroad for a university education for decades (Healey, 2008). Similar to the Uppsala model, academic programmes can also be ‘moved’ through licensing, franchising, twinning, articulation, validation and through virtual/distance modes. Conversely, the different forms of cross-border provider mobility include branch campuses, independent institutions, mergers and acquisitions, study centres, networks as well as virtual universities.

Daniel, Kanwar and Clarke-Okah (2006) note that there is an increasing trend toward south-south collaboration. Encouraging examples include the University of South Africa (UNISA) which is one of the biggest providers across Africa (Daniel, Kanwar & Clarke-Okah, 2006); India’s Indira Gandhi National Open University (IGNOU) – with an international presence in over 30 countries (Daniel, *et al.*, 2006); and OUM – which continues to target niche markets in the Middle East and elsewhere (Daniel, Kanwar & Clarke-Okah, 2006). Other instances include Phoenix University in the US which delivers courses in Puerto Rico, Netherlands, Mexico and Canada; and Harvard – which is building branch campuses in Cyprus and the UAE (Knight, 2006).

So why collaborate for cross-border education? OECD in its 2005 Guidelines asserts that:

“... Cross-border provision of higher education offers students/learners new opportunities, such as increased access..., and improvement and innovations in higher education systems and contributes to the building of international co-operation... as well as, more generally, to national social and economic wealth.”

Thus, despite variations in intent, targets, modalities, classifications and strategies, it is notable that cross-border initiatives between providers will continue to be developed through collaborative partnerships. As learners expect seamless, lifelong, affordable, asynchronous, interactive, diverse, customised, specialised and learner-centred higher education (Farrell, in Duin, Baer & Starke-Meyerring, 2001), then finding the right partners and building the right competitive, collaborative symbiotic relationships is the solution for providing the learning resources that learners require.

III. COLLABORATING FOR CROSS-BORDER EDUCATION

The following is a general framework for cross-border education:

Table 1. Framework for Cross-border Education

Category	Forms and Conditions of Mobility		
	Development Cooperation	Educational Linkages	Commercial Trade
PEOPLE Students Professors/scholars Researchers/ Experts/consultants	Semester/year abroad Full degrees Field/research work Internships Sabbaticals Consulting		
PROGRAMS Course, program sub-degree, degree, post-graduate	Twinning Franchised Articulated/validated Joint/double award Online/distance		
PROVIDERS Institutions Organizations Companies	Branch campus Virtual university Merger/acquisition Independent institutions		
PROJECTS Academic projects Services	Research Curriculum Capacity-building Educational services		

Source: Knight, 2006.

OUM has had an active involvement in internationalisation efforts. We believe that the forging of partnerships with our counterparts the world over opens doors to a beneficial *quid pro quo* relationship; increase access to university education; help expand and improve the quality, variety and relevance of Malaysia's own tertiary education system; compare ourselves to our foreign counterparts; and gain valuable feedback from our partners and foreign clients.

As an ODL institution, the opportunity for engaging in cross-border provision is perhaps more pronounced. With reference to the framework suggested by Knight (2006), we believe that the best collaborative potential with other ODL institutions lies in these two areas:

- Sharing/licensing of learning resources; and
- The offering/adoption of academic programmes.

An example in the mobilisation and sharing of learning resources, particularly to ODL practitioners, is a learning management system (LMS) partnership. The provision of a high quality LMS is integral in ODL, and though a basic system can be obtained through community-shared open source softwares, an established ODL institution with a well-developed LMS can share its expertise and technology with a newcomer to the scene. OUM has established partnerships with several local and foreign institutions, whereby we provide technology transfer, installation and training for users and administrative personnel of institutions that purchase the University's in-house system known as myLMS. With the support of Malaysia's Ministry of Higher Education, OUM also encourages local public universities to partner with us for the establishment of their own respective LMSs. Through the signing of various memoranda, licences for learning modules can also be purchased and adopted between ODL institutions.

The mobilisation of academic programmes across borders can be made by several methods as described by Knight (2006) and Healey (2008). Programmes can be exported to foreign institutions through franchising/licensing partnerships whereby the receiving institution adopts the academic programmes of a foreign institution. Though in general the provider retains control and authority over the use of its programmes, the receiving institution may be able to modify and adapt the programmes' content to suit local needs and perceptions. Included under such partnerships are credit transfer agreements, twinning, joint degrees, articulation, validation and virtual/distance mode (Knight, 2006). Malaysia, in fact, is one of the most responsive countries for joint ventures in higher education, whereby foreign universities are encouraged to develop local branch campuses in order to meet domestic demand and attract international fee-paying students from other countries (Healey, 2008). In fact, the Educational Act enacted in 1998 permits the establishment of such campuses with the intention of making Malaysia a regional education hub. Correspondingly, OUM's programmes have been made available through other foreign ODL institutions, such as the Arab Open University in Bahrain and Villa College of the Maldives.

IV. KEY SUCCESS FACTORS: THE PERSPECTIVE OF OUM

Embarking on cross-border educational collaborations requires both knowledge and experience. In this digital age, developing alliances with other firms within the value chain of the same industry appears to be a positive move towards the creation and entry into new markets and for the education business to flourish (Duin, Baer & Starke-Meyerring, 2001).

A partnership requires careful attention to construction, to the continual interaction, and to maintenance of a positive, interactive and effective experience between the institutions involved (Duin, Baer & Starke-Meyerring, 2001). Collaborations should also be a means to empower learners and enhance the missions of the institutions involved (Daniel & Mason, in Duin, Baer & Starke-Meyerring, 2001). Keeping these factors in mind and based on our own experiences, OUM finds the following to be key success factors for a successful and fecund collaboration:

1. Establishing and maintaining good bilateral relations;
2. Selecting the most appropriate local partners;
3. Ensuring the marketability and saleability of products;
4. Minding the ‘people’ factor; and
5. Properly addressing planning and execution of the partnership.

4.1 Establishing and maintaining good bilateral relations.

A partnership, more often than not, will involve the following characteristics:

- Shared authority, responsibility and management for the project;
- Joint investment of resources;
- Shared liability and accountability;
- Collaboration on common causes; and
- Mutual benefits.

In light of these characteristics, one of the most important factors is creating good bilateral relations with the potential partner. And this is particularly important at the initial phase of a collaborative partnership. An educational institution, ODL or otherwise, should try to gain the support of the local government and embassy. At an initial stage, it would be an advantage to include the involvement of relevant ministries of both participating countries. Ministerial approval and agreement to collaborate would help to expedite the commencement of a project. As a proposed partnership progresses, local embassies, the presidents of both institutions and finally, the working committees of the project could also meet and be involved in its implementation.

Casual ‘ice-breaking’ visits from both the provider and receiving institutions should be made in order to create an open atmosphere. Such visits could also be designed as a means to get to know the opposite party. As the partnership progresses, periodical visits should also be arranged to maintain a close and understanding relationship. Every institution and country is unique, and thus, both partners should respond by making an

effort to respect and adapt to each other's differences in order to make the collaboration work.

4.2 Selecting the most appropriate partners.

The cornerstone in this particular factor is 'synergy'. Obtaining background knowledge of a potential partner is an important step in selection. As partners will experience both profits and losses together, it is best to select a good, reliable and recognised institution; one that is very conscious of what it wants and the product(s) it can gain from the provider. Similarly, the local partner should also be able to contribute to the collaboration, i.e. it should be an institution that can offer product(s) that the provider needs as well. This is where 'synergy' comes in. Both institutions must be able to match each other's wants and needs. A collaboration is a 'two-way street' and should be sustained as a reciprocal relationship between the institutions involved.

4.3 Ensuring the marketability and saleability of products.

In most collaborative partnerships between ODL institutions, the products that can be sold or exchanged are academic programmes. These programmes can either be formal programmes at the diploma, bachelor's or postgraduate level; training programmes for professional development; and lifelong courses.

With the aid of the local partner, background marketability studies and surveys could be performed to understand the local environment and predict potential responses to products. Specific academic programmes could be identified and modified with the incorporation of local 'flavours' and the involvement of local scholars. The provider's pedagogical expertise could be coupled with the recipient's academic-content expertise, with each party offering essential components that the other may lack to produce effective courses.

Specific to ODL, the marketplace involved is both physical and virtual. Therefore, it is equally significant to note the technological capacity of the local institution and country and try to adapt the products accordingly.

4.4 Minding the 'people' factor.

Collaboration involves people; different people from different places, with distinctive personalities, cultures and socio-economic bearings. Sustaining a successful partnership thus requires a human touch. Both partnering institutions should be conscious of each other's qualities, strengths and weaknesses. Thus, respect is of great importance to make the collaboration work. At an operational level, partners should learn and understand each other's work culture, accreditation and regulatory bodies; as well as make an attempt to have a basic understanding of each other's languages if English is not the common medium for communication.

Those involved in such a partnership should be designated officers who can continuously monitor the project's developments. Officers from both partnering institutions should be given the chance to bond and ensure a clear, focused partnership and avoid unnecessary misunderstandings. In short, there has to be an acceptable level of cultural and linguistic sensitivity (OECD, 2005). This should favourably include not just the partners, but the academic programmes as well.

4.5 Properly addressing planning and execution of the partnership.

Internationalisation and cross-border provision in higher education are driven by the desire to reach new markets abroad; or at least to defending existing shares in foreign markets (Healey, 2008). Whether such an effort progresses horizontally or vertically according to the abovementioned framework (Knight, 2006), it is clear that every partnership requires proper planning and execution. Such planning and execution will require developing the most suitable business and implementation plans, and the signing of memoranda of understanding (MOUs) and agreement (MOAs) where appropriate.

MOUs and MOAs will serve as a legal guidance to the intended relationship, the terms and responsibilities of both partners as well as common lines of action. Thus, the memoranda must be well-prepared, practical and advantageous to both partners. The business and implementation plans could also be seen as a framework for creating value.

In this regard, the business plan should clearly indicate the financial roles and benefits for the partners. The provision of a reasonable 'seed' capital; a simple but comprehensive financial model; and a conscious effort to protect the investment of both partners are items that should also be included in the model.

Implementing the project includes addressing all major key points, e.g. the transfer of technology; marketing of the programmes; capacity building of academic personnel and administrators of the receiving institution; provision of support services; and most importantly, both parties must impart quality throughout the partnership. Capacity building is a particularly important effort that should be geared towards empowering the receiving institution that it may one day be able to have complete authority, control and executive capacity to conduct programmes and deliver services on its own.

If the partnership is designed to be a long-term endeavour, the models and memoranda should be periodically revised to ascertain that both partners can continue to benefit. The quality of academic programmes and services should also be maintained through regular housekeeping or improved where necessary.

V. ISSUES AND THE WAY FORWARD

The implementation of a cross-border partnership in ODL is not without its challenges. In this paper, we shall take a look at quality, affordability and sustainability.

As institutions seek new opportunities to offer varied and viable academic programmes from diverse providers, there is a risk that ‘rogue’ or ‘bogus’ institutions may crop up to exploit the public and act as ‘degree mills’ instead (Knight, 2006; and Vignoli, 2004). This represents an issue in quality, whereby a strategic alliance in higher education requires for both partners to understand processes in recognition and regulation in each participating country. To ensure shared benefits for both parties, it is important to ascertain that all procedures, details and content of the academic programmes and/or services comply with existing rules and policies, especially in terms of accreditation.

The provision of cross-border education involves financial issues as well. Low profit margins may damage sustainability; elitism may occur due to restricted affordability; and there are also problems concerning public funding and increased access. In light of these challenges, it is thus necessary to develop a concrete business model and ensure complete transparency of the financial status of the institutions and/or programmes involved (OECD, 2005). Periodical reviews of the plan should be carried out, particularly for long-term partnerships and to respond to local and global changes.

OUM foresees the way forward for educational partnerships to include a ‘human touch’ and continuous improvement. Forming alliances with foreign partners necessitates sensitivity. Cultural and social factors come into play, and partners should make an effort to acquire basic knowledge of each partnering country and develop proper soft and interpersonal skills to manage each other’s needs.

Continuous improvement of the collaboration requires regular visits, meetings and general interaction between partnering institutions. As asserted earlier, plans and memoranda need to be reviewed, modified and refined when needed. Both institutions should also keep track of changes in regulatory systems or national policies for the purpose of customer protection and avoiding financial pitfalls.

VI. CONCLUSION

Two decades ago, it was not foreseeable that higher education could move between universities and geographical borders. Today, however, the reality is quite different. Higher education now has new responsibilities and challenges in a more globalised world where the knowledge society, market economy, ICTs and trade have ever-growing importance and influence (Knight, 2006).

The opportunities presented by cross-border higher education are ample – for greater access; exchange of knowledge; movement of programmes, graduates and professionals; for human capital development; for income generation; and for promoting mutual understanding.

The key success factors described above are a personal experience for OUM and we are constantly looking for ways to improve ourselves. As newer codes of practice and collaborating prospects are made available, ODL institutions should not be left behind in the rat race. We are optimistic that the need for strengthened international co-operation and networking could be reinforced through timely and quality cross-border education.

REFERENCES:

- Daniel, J., Kanwar, A., & Clarke-Okah, W. (2006). *Quality Assurance and Cross Border Higher Education in the Commonwealth: The Work of the Commonwealth of Learning*. Presented at the workshop on Regulation of Cross-Border Higher Education: Issues and Trends. Retrieved June 18, 2008, from <http://www.col.org/colweb/site/pid/4114>
- Daniel, J., Kanwar, A., Uvalic-Trumbic, S., & Varoglu, Z. (2006). Collaboration in the Time of Competition. In *Open and Distance Education in Global Environment: Opportunities for Collaboration* (3-13). New Delhi: Viva.
- Daniel, J. & Mason, R. (2001). Priorities in a Learning Marketplace [Electronic version]. In Duin, A.H., Baer, L. L., & Starke-Meyerring, D. (Eds.), *Educause Leadership Strategies, Volume 4: Partnering in the Learning Marketplace* (35-53). San Francisco: Jossey-Bass.
- Duin, A.H., Baer, L. L., & Starke-Meyerring, D. (Eds.) (2001). Partnerships in a Learning Marketplace. In *Educause Leadership Strategies, Volume 4: Partnering in the Learning Marketplace* (1-15). San Francisco: Jossey-Bass.
- Farrell, G. M. (2001). Assessing Readiness for Partnerships [Electronic version]. In Duin, A.H., Baer, L. L., & Starke-Meyerring, D. (Eds.), *Educause Leadership Strategies, Volume 4: Partnering in the Learning Marketplace* (59-69). San Francisco: Jossey-Bass.
- Healey, N. M. (2008). Is Higher Education in Really 'Internationalising'? [Electronic version]. *Higher Education*, 55, 333-355.
- Knight, J. (2006). Cross-border Education: Complexities and Challenges. In *Higher Education Crossing Borders: A Guide to the Implications of the General Agreement on Trade in Services (GATS) for Cross-border Education*. France: UNESCO/COL.
- Organisation for Economic Co-operation and Development (2005). *Guidelines for Quality Provision in Cross-Border Higher Education*. Paris: OECD.
- UNESCO/Council of Europe (2001). *Codes of Good Practice in the Provision of Transnational Education*. Retrieved June 19, 2008, from <http://www.cepes.ro/hed/recogn/groups/transnat/code.htm>
- Vignoli, G. (2004). What is Transnational Education? Retrieved June 19, 2008, from <http://www.cimea.it/servlets/resources?contentId=2831&resourceName=Inserisci%20allegato>