Mass Tertiary Education in the Developing World: Distant Prospect or Distinct Possibility?

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Abstract

In the coming decades the global profile of tertiary education will be transformed by the multiplication and growth of institutions in the developing world. Age participation rates in tertiary education are below 10% in many poorer countries. To achieve the rate of 35% considered the threshold for 'developed' status these countries will greatly expand forms of provision that are marginal in richer countries today: private for-profit institutions, distance learning, and cross-border operations. When today's developing countries account for the majority of college students, tertiary education worldwide will look even more diversified as commercial providers adopt the systems and technologies of production and service industries. With appropriate international safeguards and national regulation, however, the benefits to individuals of this global expansion of access of tertiary education will outweigh any concerns that higher learning is losing its soul in a huge marketplace.

Introduction

Some economists consider that the world was more 'globalised' at the beginning of the 20th century than today (Hirst & Thompson, 1996). Similarly, international education is not a new phenomenon. Even the wandering medieval scholar, Erasmus of Rotterdam, who has given his name to contemporary student exchanges in Europe, was following a much older tradition. Huen Tsang was one among many Chinese scholars who studied in India in the first millennium. Nalanda University, where he studied, can claim to be the world's first international university (Chandigarh Tribune, 2003). We do well to recall the 1500-year history of academic exchange between China and India as contemporary developments there transform the scope and style of tertiary education.

China, India and other large developing countries will dominate tertiary education numerically in the 21st century. Their methods will effectively define the global profile of provision, which will evolve for both

economic and technological reasons. Even with economic growth of 8% or more, neither public nor private funds will be adequate to create conventional campuses at the rate required. Fortunately technology is making other alternatives available. The galloping increase in connectivity will connect people with institutions more easily and the burgeoning corpus of open educational resources (OERs) could slash the cost of creating learning materials.

How will these opportunities be exploited? There will be steady increases in three types of provision (Daniel, Kanwar & Uvalić-Trumbić, 2006). First, private for-profit education will play a relatively larger role in developing countries than it does in the OECD countries today, simply because the public sector will neither be able to afford the necessary investments nor manage the scale of expansion required. Second, distance learning, conducted at scale, which already accounts for a larger proportion of tertiary enrolments in Asia and South Africa than elsewhere in the world, will occupy an even larger place. Third, more tertiary education will be conducted across borders and import-export patterns will change. India, because of its facility in English and low costs, could become the predominant cross-border provider of tertiary education within two decades.

However, even in the developing countries where they are prevalent, for-profit providers and distance-teaching institutions still only reach the more privileged sectors of the population. Can the new technological combination of online connectivity and open educational resources allow distance learning to achieve a quantum shift towards lower costs and higher access whilst providing good quality?

In *The Fortune at the Bottom of the Pyramid,* C. K .Prahalad (2004) shows how certain large corporations have radically redesigned their business models. By aiming for low margins and high volume they have brought new goods and services to the rural poor to the benefit both of their companies and of the people who are their new customers. For developing countries to achieve the threshold 35% age participation rate that goes with developed status we shall need a similar breakthrough in the provision of tertiary education. Where will it originate and what will be its knock-on effects? How will a much larger, more industrialised and more commoditised system work? How will governments regulate and assure the quality of these large tertiary systems in the interests of protecting their citizens as consumers?

Students in their Millions

For two decades worldwide enrolment growth in tertiary education has exceeded the most optimistic forecasts. A milestone of 100 million enrolments was passed some years ago and an earlier forecast of 120 million students by 2020 looks likely to be reached by 2010. Indeed, there are already 130 million tertiary students if we count part-timers. Growth is, if anything, accelerating as more governments see the rapid expansion of tertiary education as a key factor in their transition from developing to developed country status.

Thus enrolments in China doubled between 2000 and 2003 and with 21 million students China has overtaken America to create the world's largest tertiary education system, although it has now slowed further expansion for fear of unemployed graduates. India lags behind, but demography and democracy will likely propel its tertiary enrolments past those of both America and China in the coming decades.

60% of India's people are under 25 and, as the world's largest democracy, it will be forced to respond to their desire for access to tertiary education.

Growth has been rapid in other developing countries as well - but usually from a very low base, which creates a massive disparity in the age participation rates (APRs) in tertiary education of 18-23 year olds across the world. APRs of around 50 percent are now common in OECD countries, whereas in many developing countries they languish below 10 percent.

In these countries low APRs are accompanied by demographic profiles with median ages in the low twenties or below. The scale of change in tertiary education in the coming decades can be shown simply by applying the threshold target of a 35% APR to the four billion people in the world's poorest countries. This would yield 150 million additional students, which is more than today's global total.

A comparison with the American experience puts potential solutions in perspective. With a population of 300 million and over 1,000 universities the US has an APR of over 50%. This averages out at one university per 300,000 people. If we assume that the 18-23 year-old age group accounts for between 5-10% of the total population, there will be between 15,000 to 30,000 students of conventional age amongst these 300,000 souls seeking entrance to one university. However, there are also large numbers of students aged over 25 seeking university study and these lifelong learners must be factored in too. This implies that the population base for a conventional university is actually less than 300,000.

Using this metric India alone would need nearly 2400 additional universities in the next 25 years - or roughly two new universities per week - which puts into perspective the recent announcement by the Indian government that it plans to create one central (federal) university in each of the 28 states. For all its symbolic importance this only contributes a drop in the bucket of demand. It also raises the question of what types of institutions are needed.

Just as generals plan for the previous war, educational planners and development agencies tend to prefer the creation of new versions of previous generations of elite institutions. Establishing copies of India's prestigious institutes of science and technology in Africa is a good example. Such developments may be necessary, but they are far from sufficient. A wide diversity of tertiary education establishments is needed as becomes apparent if we examine the expectations of students.

The 5-A Test

Tens of millions of third-world young adults and older lifelong learners, for whom tertiary education was previously an unattainable aspiration, will be seeking it in the coming decades. All these students will look for relevant tertiary education that passes the '5-A' test of being accessible, affordable, appropriate, accredited and accepted. Conventional public institutions that teach face to face will satisfy these criteria for some learners but will have difficulty operating at the low cost and large scale required.

Affordability is a major challenge. Many developing countries are trying to transform tertiary education from an elite to a mass system aimed at the needs of a democracy. Can public or private (for-profit or not-for-profit) providers devise a business model that can take them beyond the elite to reach out to the masses in order to realize the cost efficiencies associated with large numbers of students and respond to

national educational aspirations? In particular, can tertiary education conducted for profit work for the public good?

Tertiary Education and the Public Good

Tertiary education is a private good, with direct benefits to those who participate, but also a public good. A fire service is a more obviously useful public service than having accessible tertiary education, but the proportion of people with tertiary education does correlate well with a society's state of economic and civic development. Accessible tertiary education is in the public interest.

By tradition, governments control public goods like emergency services and defence in order to extend their benefits to all citizens and give full accountability to the electorate. Private militias are a sure indicator of the breakdown of civic order. But how far should the principle of public control apply to education? Until recently many developing countries have assumed that if tertiary education is a public good, then the state must be the sole or main provider. We contend that practice, principle, and pragmatism all argue against treating tertiary education as a public monopoly.

Past practice reveals that private bodies, notably churches and foundations, were providing tertiary education long before governments took an interest in doing so. The purpose of state involvement, when it came, was to make tertiary education truly a public good by widening access to it.

The challenge from principle concerns the right role of government and holds that apart from services like defence, government is most effective when it monitors and regulates the provision of public services by others, rather than controlling them directly.

Demography and demand present pragmatic challenges. In this era of lifelong learning, there is no way that governments can provide, at no cost, all the education that people will need throughout life. Governments have to focus their contributions.

Some years ago the World Bank briefly promoted the idea of fee-paying private education at the primary level, but it now believes that universal primary education will only be achieved if education at that level is free and compulsory. No government has the resources to pay for basic education for all from the public purse and fund all of tertiary education as well, so a choice must be made between inadequate provision of tertiary education by a public-sector monopoly or meeting the demand by a combination of public and private institutions. This is a political dilemma for many developing-country governments, which have relied solely on the first option but now realize that it is a serious drag on national development.

In response to these pressures for growth, private tertiary education has become the fastest growing segment of tertiary education worldwide, especially so in Latin America and Asia but also in Africa. In East Asia, 80% of students are enrolled in private tertiary education institutions in Japan, South Korea, Taiwan and the Philippines, where governments regulate the private higher education sector tightly. Western Europe, with only 10% of enrolments in private tertiary education, is the least affected (Altbach & Levy, 2005).

Private providers include both not-for-profit and for-profit providers. In the latter category Phoenix University, Kaplan and Laureate, are well-known , although Kinser (2006) points out that they are not typical of the generality the US for-profit sector. Nor is this only an American phenomenon. Universities in the Philippines have been listed on the stock exchanges for decades and more recently South Africa has seen a growing number of for-profit providers, often through public- private partnerships. As tertiary education institutions cross borders, however, the notions of public and private, not for profit and for profit become blurred.

Tertiary Education for Profit

In countries that do not have a clear legislative framework for charitable organisations the distinction between private tertiary institutions that are non-profit foundations and those that operate commercially for profit can also be blurred. How many family members can a private foundation support from the revenues of its tertiary college before it is considered to be operating for profit? This question may not have a clear answer in some jurisdictions and we shall not try to answer it here. In looking at the private sector we shall, however, focus our attention on institutions that operate overtly for profit.

This is because we assume that for-profit institutions will be more motivated than others to tackle the challenges of large numbers and will have access to the capital necessary to pursue their plans. How can the governments of developing countries best take advantage of for-profit tertiary education? The challenge is to achieve a balance between accessibility for students and quality of provision, along with returns for the investor. The heart of the issue is fees. In North America almost all tertiary education students pay tuition fees, but in the rest of the world - and not only the developing world - they are a hot issue.

Fees are a special problem for those countries that made tertiary education free - i.e., totally subsidized by the state - in the days when only a tiny proportion of the population was expected to go to university. At that time entry to tertiary education was highly competitive but many citizens believed - and still believe - that the combination of competitive entry and free tuition would produce equitable participation in tertiary education from all socio-economic groups. Research now shows that this is simply not true (e.g. Levin, 1990). The socio-economic profile of students in countries that charge fees while providing scholarships and loans for poorer students is more broadly based than in those that do not charge fees. This is a very important finding, and one that governments are gradually finding the courage to act on.

Changes in public fees policy are important, because what the public sector does in relation to fees clearly constrains the for-profit sector. Having a free public sector alongside an expensive for-profit sector does not create an effective tertiary education system. As countries gradually introduce fees in the public sector, either because of a conviction that it is more socially equitable or because there is no financial alternative, the for-profit sector finds itself on a more level playing field.

This in turn makes it easier for the for-profit sector to build arrangements for need-based scholarships and loans into their fees regimes. Obviously it takes time to build up enough scholarship funds for admissions policies to be truly blind to student or parental wealth, but if for-profit institutions are to play a major role in the expansion of tertiary education, they must be able to attract a diversity of people. Only then can

they truly claim that private investment in tertiary education is making its contribution to widening access and thus contributing to the public good.

By helping to widen access, for-profit institutions also foster good relations with governments and the public tertiary education sector, thereby gradually reducing the scepticism of many governments about expanding the for-profit sector. The net result will be that within a decade or two, private, for-profit provision, already estimated at $US385 billion annually worldwide, is likely to account for a larger proportion of tertiary education in the developing countries than it now does in the industrialized world.

How will the for-profit sector provide tertiary education to the developing nations? Much of it will likely follow traditional patterns of classroom teaching on locally owned campuses, but two other forms of provision will have a higher profile: distance learning and cross-border offerings.

Distance Learning

Distance learning is already providing a significant answer to the challenge of the second 'A', accessibility, in countries such as India, where it is a significant component of tertiary education. Today 24 percent of all Indian enrolments - well over two million students - are in distance education - specifically in 13 national and state open universities and 106 institutions, mostly public, which teach both on campus and by correspondence. The government's target, although it seems unlikely to be reached, is to have 40 percent of all tertiary education participation occurring through distance education by 2010.

The Indira Gandhi National Open University now has 1.5 million students and India's state open universities are growing fast. For example, the Yashwantrao Chavan Maharashtra Open University expects to grow from 200,000 to 400,000 students in the next three or four years. The West Bengal Netaji Subhas Open University had fewer than ten thousand students in 2000 but reached 100,000 students - and mega-university status - in 2007. The Tamil Nadu Open University, only created in 2003, already has 60,000 students. Some other state open universities, such as those in the states of Bihar, Rajasthan and Uttar Pradesh have not yet enrolled large numbers but the potential is there.

Despite their increasing use of India's educational satellite, these institutions use relatively traditional methods of distance education and may have reached their limits in reducing costs through these older technologies whilst maintaining an acceptable level of quality. However, a series of developments in the ways that technology is used for distance learning could now stimulate the quantum reduction in operating costs required for a further radical widening of access. The question is whether existing public institutions will be able to harness these disruptive technologies (Christensen, 1997) or whether the for-profit sector will do it better. A look at the past is instructive.

New methods of education have always attracted private providers. In 1837 Isaac Pitman offered the first correspondence course (in Shorthand) even before Britain standardised the Penny Post in 1840. For-profit providers subsequently dominated the correspondence education industry. The next wave of distance education, led by the large multi-media open universities, was dominated by the public sector. In addition to widening access dramatically in some countries, these institutions also showed that distance learning can be of higher quality, as well as less expensive, than conventional tertiary education because it has to be developed and delivered in a much more systematic way.

The current wave of distance learning, often called eLearning because of its extensive online components, seems once again to have a special appeal to the for-profit sector. It has a cost structure in which a higher upfront investment is rewarded by lower marginal costs when volume is achieved. The for-profit institutions' access to capital markets allow them to make those investments.

Moreover, providers wishing to use eLearning now have available a rapidly growing body of open educational resources: freely available learning materials that can be adapted to particular local needs. This is a crucial development. The combination of expanding connectivity and the swelling reservoir of open educational resources is potentially revolutionary, not least because it may allow institutions to achieve low per-student costs without having to achieve huge volumes. Course development costs are a major item for quality distance education. Open educational resources allow the widespread adaptation and use of good learning material. They could be the key to implementing, in distance education, Prahalad's injunction (Prahalad, 2004) to create 'highly distributed, small-scale operations married to world-scale capabilities'.

Accessibility also means access to the technology and allied infrastructure through which distance education is delivered. Internet connectivity is particularly important, yet the proportion of people online is only 4% in India, 1% in Africa (half of them in South Africa) and 0.1% in Bangladesh. But in contemplating the limited use of the Internet in sub-Saharan Africa and South Asia, we should recall that twenty years ago the online technology now permeating the West hardly existed. Communication links are already beginning to alter the way that poor villages in the developing world function. As bandwidth costs go down increased Internet connectivity will accelerate that trend.

Cross-Border Provision

Distance learning is becoming an increasingly important vehicle for cross-border provision as connectivity and electronically-held open educational resources become major features of its teaching and student support systems.

UNESCO and the OECD (2006), in their Guidelines for Quality Provision in Cross-Border Higher Education (CBHE), state that cross-border higher education includes:

"higher education that takes place in situations where the teacher, student, programme, institution/provider or course materials cross national jurisdictional borders. (It) 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)."

Those cross-border providers include not just conventional or open universities but also media companies, multinational companies, corporate universities, networks of universities, professional organizations, and IT companies. Note that nearly all cross-border tertiary education is effectively offered for profit in the receiving country. Even if the originating institution is a public institution in its home country it must make "excess revenue" - or profit - on its work in other countries in order to sustain those operations.

The border is a symbol for the special political, social, and cultural identity found within the national space. Accepting borders implies recognition of the roles and responsibilities of national governments within their jurisdictions, not simply for deciding whom to let into their country but also for overseeing the national tertiary education system.

National sovereignty over tertiary education has been reinforced by the General Agreement on Trade in Services (GATS) of the World Trade Organization (COL/UNESCO, 2006). The GATS recognizes four modes of supply. First there is *consumption abroad*, where students travel to another country to study. Second, there is the *presence of natural persons*, which in academic terms means visiting scholars or teachers. Here we are more interested in the other two forms of supply, defined by the GATS as *cross-border supply and commercial presence*, but better known as distance education and the establishment of branch campuses. These are the forms of cross-border tertiary education of most interest to for-profit providers.

Such providers often fail the test of our third 'A', appropriateness. Their subject offerings are limited and liberal education often loses out to an exclusive focus on market-driven programs such as business and information technology which sometimes prove ephemeral. Students from a variety of cultures and linguistic backgrounds follow the curriculum of the country of origin, baseball or cricket metaphors and all, with no recognition of social, cultural, and ethnic differences (Daniel, Kanwar & Uvalić-Trumbić, 2005)

Cross-border provision will become fully relevant only when it responds to country priorities, which is best done through strong partnerships between the overseas provider and local institutions to develop curricula and methods of delivery and student support. Such linkages also help with the fourth 'A' that students seek: accreditation. Some jurisdictions will not accredit foreign providers unless they have local partners.

Students like many characteristics of the newer forms of provision. They respond well to the strong customer focus of good for-profit institutions. They like the convenience and flexibility of distance learning, often finding that, with an effective student support system, human contact in distance learning is both more personal and more effective than in conventional systems. Some students value the overseas qualification that comes with cross-border provision.

However, students prefer their institutions to have more than formal accreditation. They seek a fifth 'A' of acceptability in their community. They want their academic titles to enjoy a good reputation. The reputation that the public accords to educational institutions changes slowly - rightly in our view. It takes time to build up an institutional reputation and, barring egregious mistakes, it also takes time to lose one. For-profit providers, distance learning and cross-border programmes face greater challenges in the areas of accreditation and reputation than nationally based conventional providers.

For example, even the oldest of India's open universities is barely twenty years old; so they have hardly had time to acquire a reputation for quality, even where they might deserve it. Furthermore, the open universities in India have had to contend with the poor reputation created for distance education by some correspondence courses offered by India's conventional universities. These longstanding operations, which enrol hundreds of thousands of students were, and mostly still are, poor quality operations with

shoddy learning materials and minimal student support. The universities use them as cash cows to subsidise their campus operations.

The irony is that, although the students in these correspondence programmes have a poor experience, they have the advantage of being associated with prestigious institutions such as the University of Delhi and the University of Madras. Students looking for distance learning have a choice between low-quality courses, with no support, that carry the name of a well-known university, and higher-quality programmes from an open university that has yet to acquire its reputation.

We can only hope that with time each institution's reputation will become aligned with its inherent quality. Can this process be speeded up?

Quality Assurance

Within two decades the global tertiary education enterprise could have more than doubled in size, be predominantly based in what today we call developing countries, and present a greater diversity of both providers and provision.

How will the world ensure the quality of such a vast enterprise? Specifically, how are governments to protect their citizens from fraudulent providers and bogus qualifications, especially when they emanate from another country? eLearning is attractive to unscrupulous operators because they can close down a website even faster than a post-office box. Cross-border tertiary education makes students particularly vulnerable to scams. Some for-profit providers only seek commercial benefit, ignoring developmental objectives and intellectual advancement. How can we create an international ethic of integrity and quality assurance?

As tertiary education expands, governments' role will increasingly be to monitor and regulate it, rather than to provide it. Many developing countries currently lack quality-assurance mechanisms, and where they do exist, as in India, they are not always properly equipped to cope with diversifying types of provision. However, countries realize that the GATS has created an inexorable trend towards increasing cross-border education supply. Governments will best respond to this trend by building strong frameworks for regulation, quality assurance, and accreditation that cover all tertiary education provision within their borders. The task for UNESCO, the Commonwealth of Learning and other intergovernmental organizations is to support national and regional developments effectively.

The tertiary education market already has plenty of dubious providers and bodies offering accreditation - some of the latter even claiming a phoney affiliation with UNESCO! Clipping the wings of such operations is in the public interest, but how do we do it? Empowering students, parents and employers to make informed decisions is the best bulwark against deception and fraud. There are no easy solutions but here are five of the tools that already exist or are emerging.

1. UNESCO has published *Study Abroad*, its international guide to tertiary education institutions and scholarships, for nearly 60 years (UNESCO, 2006). It covers over 150 countries. Recent editions include more on open/distance learning and have a section 'Tools for Students'. This is

based in part on the excellent work of South Africa's Council on Higher Education on promoting quality literacy about tertiary education among secondary students (Naidoo, 2005).

2. UNESCO and the OECD, in an alliance covering both exporting and importing countries, have developed *Guidelines for Quality Provision in Cross-Border Higher Education*. They address all six stakeholder groups: governments, institutions and their staff, quality assurance agencies, student associations, professional groups, and qualification-recognition bodies (UNESCO/OECD, 2006)

3. Since the World Trade Organisations's General Agreement on Trade in Services, the GATS, is still making waves in international education, the Commonwealth of Learning and UNESCO have published a simple guide to what GATS is and is not (COL/UNESCO, 2006).

4. In 2006 UNESCO launched the pilot of a portal on recognised tertiary institutions in order to explore the feasibility of maintaining such a facility at the world level. The project follows on naturally from the Guidelines for Quality Provision in CBHE and shares their objective of protecting students from low-quality offerings and empowering them to make informed decisions based on transparent information on the quality of higher education provision.
The basic concept is that UNESCO hosts the portal, with the competent national authorities of participating countries providing reliable information on the recognized, registered and/or accredited institutions in their country and keeping this information up to date. This obligation will stimulate some countries to rethink the issue of how they define institutions of quality and how they create the capacity to assess them.

5. The various stakeholders concerned with the quality of international education now meet under the aegis of the Global Forum on International Quality Assurance, Accreditation and the Recognition of Qualifications. It convened for the third time in Tanzania in 2007 under the theme, *Learners and New Higher Education Spaces*.

Putting it All Together

We have argued that the rapid expansion of tertiary education in developing countries will give for-profit institutions, distance learning and cross-border provision a much greater role. We have assumed that this trend, allied with the use of constantly improving educational technologies, will help to make tertiary education accessible to the masses at an affordable price. Is this merely wishful thinking or is there evidence that it is happening?

For-Profit Providers

As regards for-profit providers, most are content to operate within the same broad parameters as the rest of tertiary education. When they are able to achieve economies of scale and superior efficiency, as in the case of Phoenix University, they tend to grow their profits rather than cutting their fees. However, one exception, which is consciously trying to apply Prahalad's ideas to tertiary education, combines the three trends we have identified: a for-profit institution using distance learning technologies across national borders.

Best Associates, a US merchant bank, is creating educational enterprises that are aimed squarely at combining greater learning effectiveness with dramatically lower costs. At the national level it is slashing the cost and improving the relevance of professional development for teachers through the American College of Education. This for-profit institution, already one of the ten largest teacher education operations in the USA, teams up with school systems to offer M.Ed. degrees that meet the schools' need for teacher development better than existing programmes and do so at one-fifth of their cost.

At the global level Best's Whitney International University System is expanding rapidly, both by acquiring universities in other countries and creating joint ventures with existing universities. Having begun its expansion in South America it is now launching ventures in Morocco, Jordan, Saudi Arabia, India and Indonesia. The mode of delivery is distance learning that blends the remote-classroom and asynchronous approaches. Lectures from senior professors are carried to remote classrooms by satellite or computer and these are underpinned by supporting professors who interact individually with relatively small groups of students online. Unlike conventional remote-classroom teaching this model is scalable because of the network of supporting professors; an essential feature for achieving a low price point. Another cost-saving principle is to use existing facilities, study centres and tele-centres.

Best Associates implements Prahalad's vision by setting a low price point as step one of the planning process and then building a teaching-learning system to achieve it. It is too early to predict the success of the model in developing countries, although the US example of the American College of Education is encouraging.

Improving Educational Technologies

Our other key hypothesis is that the combination of expanding connectivity and open educational resources will radically reduce costs. We can be confident about the continuing advance of connectivity, but will institutions really take advantage of OERs? The world's smaller states, where populations are too small to amortise course development costs over large numbers of students, may be showing the way. The Virtual University for Small States of the Commonwealth is an attempt by 28 small countries to develop OERs jointly on a Wiki and adapt them into courses at the national level (COL, 2007).

The OER movement is too new for us to assert with confidence that these electronic learning materials will always bridge the last mile to the individual student in the form of courses that carry credit. However the signs are promising. We foresee the day when institutions will turn to repositories of OERs to obtain and contribute courses in the same way that individuals now turn to the Web to find and publish information in a variety of media.

Conclusion

Starting with the objective of a significantly lower price point and using technology and good management to achieve it with a quality programme is still a revolutionary concept in education. Most for-profit institutions are still content to be 'cream skimmers' operating just a little more cost effectively than their rivals. Most public institutions assume a direct correlation between cost and quality and resist attempts to achieve lower price points.

However, the millions who still thirst for tertiary education must hope that some providers, both public and for-profit, will espouse this revolutionary concept successfully. In so doing they will create a tectonic shift that will make access to higher learning in the developing world a distinct possibility rather than a distant prospect.

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