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Non-Conventional Higher Education and the Construction of a Learning Society

GE Daokai

At the invitation of the organizing committee, I'd like to give a presentation on my thinking about the topic “the non-conventional education and the construction of learning society”. And I want to have a look at what kind of enlightenment we can get from the perspective of the historical development of the non-conventional higher education.

It is said that history is a mirror. We are glad to see that the chairman of the ICDE is an expert in the area of history research (historian). I think his research on history must be very profound. So today I take this opportunity to talk about the history of China’s non-conventional education and try to find something from it. My report can be divided into three parts. It will start with the future, trying to find what kind of demands do we need for nowadays and the future. After that we will retrospect the road we have walked on by means of these demands. And lastly, we will see what we can conclude.

First, let's have a review of the concept of “learning society”. It was first advanced by Mr. Hutchins (Robert M. Hutchins) in 1968. In 1971, the UNESCO gave a description about the three concepts “lifelong educational, lifelong learning and learning society” in the book Learning to be and systematized this theory in the Faure report. And it was promoted through the UNESCO. In the next 30 years since then, the issue of lifelong education and lifelong learning has gradually become a dominant educational thought in the world. After that, its theoretical research and practical exploration were successively conducted all over the world. After entering the 1990s, the conception of learning society has been transformed into concrete action plans and strategies in developed countries, and has been also gradually turned into the exploration and implementation phase of policy making and legalization.

Next, let's have a look at the description of learning society. The concept of learning society was described differently by scholars home and abroad. For example, the international scholars and organizations like Mr. Hutchins (1968), the UNESCO (1972), the Carnegie Fonfation (1973), Peterson (1983) and Ranson (1998) have defined learning society. For instance, Mr Hutchins (1968:133) suggested that the learning society would be “one that, in addition to offering part-time adult education to every man and woman at every phase of grown-up life, had succeeded in transforming its values in such a way that learning, fulfillment, becoming human, had become its aims and all its institutions were directed to this end.” The Carnegie Commission on Higher Education defined the learning society as a society in which individual learns at home, schools, society, working place, and other educational training institutions. Many scholars in China like HU Mengjing (1991), HUANG Shunfu (1998), LI Yixian (2000), MENG Fanhua (2003) and ZHOU Hongyu (2005) have also described learning society. For instance, LI Yixian (2000)said that, “A
learning society refers to the one that is centered upon learners to satisfy the learning needs of all the members of the society based on the system of lifelong learning, lifelong education and learning organizations, and further to obtain sustainable social development on its own.”

If we analyze the definition of learning society, we can find that although the starting point of each scholar’s description is different, the four elements of the learning society were all concerned. The first one is the learners of learning society in which learning has become the basic qualification of people’s survival and development. The second element is the learning organization, and the school is not the only learning organization any more while various institutions and organizations in society can all provide learning opportunities. The third element is learning systems and there should be an open and interactive learning system in learning society, including learning evaluation and accreditation system and approbating system of learning outcomes in different learning organizations. The fourth one is the learning platforms, which can realize the communication of information and knowledge in order to provide relevant learning conditions for learners.

If we re-analyze these expressions of scholars, we can also find that the learning society in people’s ideals has four characteristics. The first one is independence, which emphasize that the value of self-learning, especially the self-learning with others’ help, should be fully fulfilled in the learning society. The next one is openness, which means that there should be abundant learning recourse, diverse learning content and flexible means of resources organizing. The third one is the equality. In other words, every social member should be offered full learning opportunities to achieve their learning demand. The last one is the convenience. In learning society people have a quick, convenient and flexible access to information and knowledge to achieve an effective link between the learners and learning organizations.

According to the understanding of the learning society, every country has chosen different paths to push forward the construction of learning society. For example, the Unites States gradually stepped into the lifelong learning society beginning from the community college and various adult education. We have friends here from Sweden, and the path towards a lifelong learning society that Sweden has chosen may largely start from developed adult education and recurrent education. We also have the president of Japan Open University here. As is known to us, the Osaka city in Japan achieved the goal of building a learning city by giving full play to its history and culture. Take Taiwan for another example, it promotes the construction of learning society by establishing a community lifelong learning system. As in the mainland of China, which path we will choose and should choose? Let’s attempt to find a number of issues from a historical perspective.

In the following part, let’s review the development of non-conventional education in China. The so-called non-conventional higher education is a term compared to full-time general higher education. But it is based on the diploma education as its main content. It also includes non-diploma education. After the founding of New China in nearly 60 years, China has developed a variety of
forms of non-conventional higher education. So far there are still 10 forms of non-conventional higher education. They are respectively evening college, Correspondence Education, radio and television education, adults full-time schooling, self-study higher education examination, the second bachelor’s degree, equivalent diploma, professional degrees, open education and web-based education.

The development of these ten forms of non-conventional higher education can be generally divided into three phases. The first one is the initial exploration phase, from 1950 to 1978, marked by the exploration of openness to target learners. In this phase, the conventional higher education achieved its preliminary transformation from in-campus to out-campus. The second phase is the multi-way exploration phase, from 1979 to 1998, in which China has successively produced six forms of non-conventional education. So it can be called a phase with its emphasis on the exploration of openness to educational forms. The third phase is the distance open education phase, from 1999 to present. In addition to maintain the exploration of openness to target learners and educational forms, the exploration in this phase gives more emphasis on the openness to educational resource, methods and environment.

In order for us to have a more in-depth understanding, I’d like to discuss this ten non-conventional higher education forms in detail.

The first two kinds are evening college and correspondent education, which were born in the early years of new China when the conventional education was very weak. Large-scale economic construction urgently needed a large number of talented people. In that case, the evening college was initiated in Renmin University of China in 1950. Besides, the correspondent education was also initiated in this university in 1953. What is described in the following chart is the registered students’ scale of evening colleges and correspondent education from 1999 to 2007. In 2007, the number of registered student of correspondent education, colored in green, is 2,580,000 and that of the evening colleges, colored in blue, is 1,360,000.

(Unit: ten thousand)

![Chart1: The registered students’ scale of evening colleges and correspondent education.](chart1.png)

The third kind of non-conventional education is radio and television education, which mainly utilizes the radio, television, printed and audiovisual
materials to carry out long distance teaching. This period was mainly from 1979 to 1998. Chart 2 shows the changes of the registered students’ scale, happened in 20 years from the foundation of China Radio and Television University to 1998. The black line shows the number of the campus students of adult education enrolled by radio and television universities. The green line shows the number of campus students of general education of radio and television universities. Therefore, China’s Radio and Television universities also carried a small amount of traditional education from 1986 to 1998, or even more lately to 2006.

(Unit: ten thousand)

The fourth one, adults full-time schooling, was initiated in August 1980 based on the urgent needs for a large number of talented people in economic construction after the Cultural Revolution and for the purpose of training the great majority of cadres. That's the reason why its former name was called the special training courses for cadres. Chart 3 shows that the adults full-time schooling still has 670,000 students till 2007.

(Unit: ten thousand)

The fifth kind of non-conventional higher education is the self-study higher education examination that is a unique and creative educational form of China.
Precisely speaking, it should be called an examination form, and was initiated in Beijing, Tianjing, Shanghai and Liaoning province between 1981 and 1982. It began to extend to the nation wide after 1983. The basic characteristic of this form is that any of the social members can get the knowledge by his self-learning. If the social member can not learn well by himself, he can get help from various types of social organizations. If he reaches a certain level and passes the national organized examinations, his learning outcome will be recognized by the nation. Hence, this educational form has only three links: self-study, social help study and national examine. This system was initiated based on the encouraging all social members to learn and to be a talented person by his endeavor. By 2007, there are progressive total 4, 870,000 persons participating in the self-examination and 8,450,000 persons get the diploma of associate degree or above. However, the number of attending this kind of learning has begun to decline in the recent years. The number in the year 2000 was a peak with 14,000,000 attendances and gradually declined after that with a number of 9,500,000 in 2006.

( Unit: ten thousand )

Chart 4: Person-times of taking self-taught exams and number of students who have obtained certificates

The second bachelor's degree system is the sixth kind of non-conventional higher education. In the early 1980s, after graduating from college, many people cannot use what they have learned at their work. In order to let these people be able to better serve the needs of working, our country established this kind of system. This system started in 1984 for the purpose of training some interdisciplinary advanced specialized talents with wide range of
knowledge. By 2007, there are 73 programs and 375 professional sites of the second bachelor’s degree opened in colleges and universities.

The seventh and eighth are equivalent diploma and professional degrees systems. The system of in service personnel’s applying for equivalent master degree and PhD began in 1986. This learning system requires learners to have a background of abundant working practices. Based on this, they can attend the postgraduate classes and can also obtain the courses accreditation by participating the self-study examinations of the schools. After that, if learners pass the foreign language examinations and integrative tests organized by the country and take part in the paper defense of general colleges and universities, they can acquire the corresponding master degree or PhD.

Professional degree education, started in 1990, is another degree system different from disciplinary education. It faces to those who have rich professional experience and mainly aims at cultivating the high-level applied talents not the discipline research talents. There are two types of Professional degree systems in China, professional master and professional doctor. The former one includes business administration, education, translation, international Chinese education, law, accounting, public management, engineering, architecture, landscape architecture, agricultural extension, public health, veterinarian, clinical medicine, stomatology, pharmacy, physical education, art and military, etc. The latter one includes clinical medicine, stomatology, veterinarian and so on. By 2007, the number of enrolled in-service staffs to apply for master's or doctor’s degree and professional degree education is 3,460,000, with 7357 doctors and 338711 masters.

The ninth kind is the open education. The open education is an educational form organized and implemented by China radio and television education system. It operated integratively by utilizing the network with the coverage of the urban and rural areas across the country and implemented the management of registration entrance, flexible learning system and credit system. Its main feature is to integrate the high-quality educational resources of the society including the general colleges and universities and then open to the learners. The following chart shows the number of registered students in the open education in China since 1999. It keeps a development trend of sustainable growth.

(Unit: ten thousand)

![Number of registered students of China's open education in 1999-2007](chart.png)
Web-based education also began in 1999. The difference between web-based education and open education is that colleges and universities can use their own educational resources to open to the community. By 2007, altogether 67 universities have opened the web-based education. As of last year, it has around 1,000,000 enrolled students.

The following chart describes ten forms of non-conventional higher education. It is clearly shown that the development of non-conventional higher education in China can be divided into three phases, the initial exploration phase (from 1950 to 1978), the multi-way exploration phase (from 1979 to 1998), and the distance open education phase (since 1999).

### Chart 7: Form of Education
These ten non-conventional higher education forms are different in their historical background of generating, and have their own characteristics in the development processes. Besides, their target learners are also different. However, they have four common elements: abundant and various high quality educational resources; effectively operated school-running networks; good quality supporting service; standardized management and quality assurance measures.

Study their history of development, we can find that they have four common characteristics in the development demands or directions. Orienting to the vulnerable groups and offering educational services; Meeting the learning needs of in-service staffs as their endeavor direction; Promoting the openness, convenience, and flexibility of educational activities as their direction; Advancing the wide utilization of high quality educational resources. Therefore, these ten non-conventional higher education forms have their own characteristics but also have something in common.

If we compare the four elements and four characteristics of the non-conventional higher education with those of the learning society, what will we find.

| The comparison between learning society and non-conventional higher education |
|-------------------------------------------------|-------------------------------------------------|
| **Learning Society**                           | **Non-conventional Higher Education**            |
| **Development characteristics**                |                                                 |
| 1.independence;                                | 1. Orienting to the vulnerable groups and offering educational services; |
| 2.openness;                                    | 2. Meeting the learning needs of in-service staffs; |
| 3.equality;                                    | 3. Promoting the openness, convenience, and flexibility of educational activities; |
| 4.convenience;                                 | 4. Advancing the wide utilization of high quality educational resources |
| **Development elements**                       |                                                 |
| 1.learners;                                    | 1. Abundant and various high quality educational resources |
| 2.learning organization;                       | 2. Effectively operated school-running networks; |
| 3.open and interactive learning system;        | 3. Good quality supporting service; |
| 4.well developed transmission platform of information and knowledge; | 4. Standardized management and quality assurance measures |

Based on the analysis of this table, it is not difficult for us to find that the developmental demands between learning society and non-conventional higher education have much in common and also have some differences between them. Their sameness mainly contains two aspects. Firstly, the targets of a learning society and non-conventional higher education are the same in constructing the system of lifelong education. In other words, in people’s ideality, the construction of learning society needs to be supported by lifelong education system while the lifelong education system is the very goal chased by non-conventional higher education. Secondly, the construction of learning society emphasizes on the diversified learning ways and means, various technical means, especially the utilization of information technology, which is also consistent with the multi-way exploration of non-conventional
higher education. That is to say, in people’s ideality, the learning ways and means in learning society are various and unrestricted. Over 50 years development process of non-conventional higher education exactly proves that it is consistently pursuing a variety of possible educational forms. Therefore, they are consistent on this point.

However, they also have differences, which contain two aspects. Firstly, learning society is required to meet various learning demands of all social members while the non-conventional higher education gives more emphasis to the needs of social members in diploma education. The former one is the extensive and universal educational demands and the latter one is the demands for diploma education. They are different. Secondly, the learning society requires the wide participation of various social organizations while the non-conventional emphasizes on the dominant role of educational institutions. Hence, in the discussion of learning society, these various institutions usually think more about the question how our resources can be used by learners. But the question how to fully integrate the social resources is concerned in the construction of learning society. These are the differences between them. If the analysis to the similarities and differences are correct, we can draw four conclusions from it.

1. After almost 60 years development and accumulation, China’s non-conventional higher education has become valuable resources and important basis of construction of a learning society.

2. According to the development courses of non-conventional higher education, the construction of a learning society should focus on the use of ICT in order to promote integration and sharing of learning resources, establishment of learning environment and exploration of learning methods.

3. In the next step for the development of education, developing the distance education and continuing education should be treated as a significant way of constructing the learning society.

4. It is clear that the development of non-conventional higher education has many gaps and challenges when facing the requirement of constructing the learning society. In order to play a more important role in the learning society, the non-conventional higher education should accelerate its structural adaptation, including content reformation, resources integration and environmental construction.

( The Author: GE Daokai, The President of CRTVU )
Trends, Innovations, and Opportunities in Open and Distance Learning

Frits Pannekoek

Universities have always been at the forefront of internationalism. The primary beneficiaries of their interest and activity, it could be argued, have been universities in the developed world. Internationalization, some have argued, has allowed universities in developed countries to attract and retain the world’s best brainpower. In the past, many of the thinkers that these institutions have produced have argued that international understanding would end global conflict. While some would insist that it hasn’t, others will argue that movements toward increasing international collaboration, through the United Nations and other regional associations, have resulted directly or indirectly from these international exchanges, the roots of which date back at least one hundred years. More recently, many have argued that internationalization is the route to prosperity, that the world is being shaped by a new knowledge economy that knows no boundaries. Learning, therefore, it is argued, is a human right. These declarations are noble and are certainly worth our individual and collective commitment. But where are we now? What have we achieved? What is our future?

Research on the state of learning has been undertaken by agencies of different types: by international bodies like UNESCO, by non governmental organizations like the International Council on Distance Education, by universities and by national agencies. The key questions that these researchers have been grappling with, however, are similar:

1. Firstly, as we advance the rhetoric of the new knowledge economy, what does its ascendency mean for the resource based economies of the developing world? Some argue that the problems of resource-based economies are being sidelined. Others argue that successful resource based economies will be knowledge driven even at the producer level.

2. Secondly, is learning itself just another commodity, like banking or technology, that should be open to international competition? The various international trade bodies are increasingly pressing to open the educational marketplace to competition. While there may be considerable wiggle room under the GATS for the preservation of national interests, the real issue is not learning itself but its product—intellectual property. IP is being increasingly scrutinized by WIPO, the World Intellectual Property Organization, a United Nations body. WIPO is clear in its direction that nation states should protect the intellectual property of their commercial organizations and citizens. However, certain nation states and educational organizations are exerting considerable pressure to exempt educational
institutions, particularly distance education institutions, from such protection. It must be remembered that copyright laws were initially introduced in eighteenth century Britain to ensure the access rights of educational interests. However, access to the best digital information is becoming increasingly restricted and, most lamentably, increasingly expensive, so expensive, in fact, that many post-secondary institutions in the developed world can afford only a small percentage of what is available.

If knowledge is a commodity rather than a social good, so, increasingly, is education itself. Many corporations have their own universities: General Electric’s Crotonville, Motorola University, McDonalds Hamburger University, Sun Microsystems Educational Services, etc., and a number of for-profit universities have sprung up: Apollo Group, Sylvan Learning systems, DeVry University, etc. Virtual universities and the for-profit arms of traditional universities, both of which are strongly oriented toward making money, are further complicating the educational landscape.

And this landscape, which is already complex enough, is changing rapidly in other ways as well. For example, international information vendors, a.k.a. textbook publishers, are moving into the provision of learning. And more confusion is being generated by non governmental organizations that are attempting to build collaborations and partnerships to mitigate what they regard as the worst for-profit aspects of the traditional university world. Lines between private and public are being eroded and many new questions are being asked. Few answers are apparent.

3. A third and key question is What should be the national capacity for learning?

This is a difficult question to answer because any answer suggesting limits might be construed by some as a decision to restrict some citizens’ access to opportunities to achieve their full potential. On the other hand, developing countries lack the means to create and staff post-secondary institutions that could achieve even the level of participation common in most developed countries today. Many have decided that the only way to build capacity is to encourage the development of private sector or foreign owned institutions, which are often off-shore. This approach can result in the loss of the very best, but are there alternatives?

4. This leads us to the forth question. To what degree should government become the regulator of post-secondary learning? To many, the answer might seem obvious: someone has to ensure that students are receiving the quality of learning and the credentials that they are paying for. But this is a relatively new role for government. In some jurisdictions, post-secondary institutions are and have always been essentially self-regulating. In others, governments regulate either through legislation or through national councils. Indirect forms of regulation are also applied, through the control of student support. For example, some jurisdictions will not provide financial aid to students who take distance education programs through foreign providers even though financial support is provided to students leaving the
home country to study abroad. What are the impacts of these kinds of decisions? Do they encourage the best to leave? Do they marginalize those who need support the most? Do these decisions restrict internationalization to an elite?

5. How do we maximize brain gain and minimize brain drain. Africa, for example, sends a higher percentage of its post-secondary students abroad than any other part of the world but also loses the highest percentage to host countries. Sending students overseas, often at the expense of the receiving institution, is the cheapest way to build post-secondary capacity, but at what cost? Firstly, too few students return to help reshape their societies and nations. Secondly, the capacity to develop a national learning strategy based on the national and regional culture is compromised. Others might argue that, on the other hand, this practice has helped develop truly international solutions to the problems facing the post-secondary world and that it has helped internationalize business.

6. This leads to the sixth key question. How do we manage the research outcomes of post-secondary institutions so that they have the maximum positive impact? WIPO suggests that this goal is best achieved by controlling patents and copyrights. Others suggest that knowledge is universal and that the best knowledge must be freely accessible. Those who support WIPO will argue that all economic modeling suggests that knowledge has commercial value and that in order to secure capital for investment in the future that commercial value must be protected. There are alternatives to this view, and some are well expressed in Don Tapscott and Anthony D. Williams' Wikinomics.

These questions are complex and few answers have yet to be derived or agreed upon. Our governments, our societies and our students are increasingly turning to the university sector for answers. What answers have we generated to these six key questions? I would argue that the post-secondary sector has, for the most part, engaged in defending their existing hegemonies, in protecting the status and value of their brands and in ensuring that whatever the brain drain, it flows in their own direction. Let us look at how the universities have responded to one of the key issues outlined above. How have post-secondary institutions responded to the increased cost and control of new knowledge? They have reacted in four different ways.

Firstly, in the developed world, most have either paid significantly more for or significantly reduced the size of their collections. Others have formed national consortia to purchase materials for the nation as a whole. Some argue that while this approach may control costs now, it will ultimately result in increased costs.

Secondly, throughout the developed world there has been an aggressive move to open access. It has manifested itself in various ways: faculty open access archiving, supporting open access publishing and the retrospective digitization of materials in the public domain. This open access movement has probably done
more to ensure the internationalization of knowledge than any other initiative. However, it has had challenges as well. Firstly, most of the free information has been in the humanities and social sciences, which have always been undervalued in any case. Secondly, development of most of the free information requires the support of very expensive infrastructure, so the flow of knowledge has been largely one way, from the developed to the developing world and from the English-speaking to the non-English-speaking world.

Universities have also responded by offering their courses freely online to anyone or any institution who wishes to use them. But has this practice really accomplished anything other than increasing the value of certain elite university brands, those of universities that are inaccessible to the vast majority of the world’s citizens anyway. Some have also argued that this sharing really represents a form of intellectual neo colonialism since the course content was not collaboratively created and, further, since the perception that it is free will undermine the will of nation states to create their own knowledge.

Thirdly, in the increasingly competitive international marketplace, the universities of the developed world have been able to attract the best minds through aggressive marketing and lucrative incentives. The flow of internationalization is still one way.

Finally, the post-secondary sector has made one major leap forward through distance and e-learning. For the first time, post-secondary learning has broken free from the fetters of geography and is now available to anyone who can access the technology, still a major issue in much of the world but less so with mobile learning on the horizon. Yet while e-learning offers so much hope, it too has its detractors, who argue that it lacks quality. Many of the new information and learning initiatives would seem to reinforce the ability of open and distance universities to massify learning, but if this is so, why has it not yet happened? There are I believe several reasons:

a. The traditional universities are resistant to open and distance universities, basing their reservations mostly on the quality argument. They know that if open and distance education can offer similar or better quality at lower cost, their arguments for additional resources might be challenged.

b. Distance and open universities are, for the most part, still modeled on the conventional, residential university. One of the great benefits of the e-world is the ability to harvest the creativity of many for the benefit of even greater numbers of people. However, academics come from a culture of craft rather than that of industrial production. It is the connection between student and master not the connection between knowledge and learner that is valued. Indeed the master-student relationship is so ingrained that technology is often used to recreate that model rather than to individualize learning as an
independent act. Is it any surprise that the open courses offered by many of
the world’s universities have had so little uptake.
c. Universities have given little thought to the construction of their own economic
realities. What is the value chain in the post-secondary world? Can it be
disaggregated? If it can, what would the points in the value chain be? Can
tuition for teaching, costs of mentoring, costs of student services, the cost of
information, the cost of examinations, the costs of quality assurance, the
costs of research and the costs of credentialing be separated? Can the
private sector assume some of these responsibilities at a lower cost? What
real values do universities provide? How would learners react to a
disaggregation of the value chain?

Perhaps a fresh examination of the learning value chain could help us come up
with new approaches to open and distance learning universities. Rather than do an
exploration of various alternatives to this value chain, I will make a simple proposal,
one which I have already offered to various organizations: the development of a best
first year that could be adopted or adapted by any post-secondary institution in the
world. This proposal is divided into several economic and learning components for
the purpose of argument:

1. Recruitment: All universities spend a great deal of money in this area. But
why? Is it to excite students to learn or is it to ensure their market share? If it were to
excite students to learn then collaboration among institutions would be possible. But
then the real issue becomes whether the students are ready to learn and whether
they have the competencies to succeed.

2. Course materials or information: Recent studies by publishers have indicated,
for example, that 80 per cent of the first-year engineering program is common to
most universities. Other studies have indicated that, while there might be similar
expectations in other disciplines, there is considerable variation in content,
particularly in the humanities and social sciences. What would happen if the 12 to 15
most common courses were developed and designed, along with appropriate
readiness modules, so that there was in effect a common, worldwide, first-year
standard. The courses would be available at no cost to any learner, faculty member
or institution to use or adapt. The investment to create such a common year would
be 20 to 40 million Canadian dollars, not an insubstantial amount, but such a dream
is fiscally possible. However I do recognize that learners would need access to
affordable technology needed to gain competencies at the highest first-year
university level on one’s own. And that may be for a while yet, a major impediment.

3. Learning Support: Of course, many students need support to help them
develop their learning skills, to overcome learning impediments and to move to the
next stage of learning. Learning support involves faculty and professionals at rather
intensive levels. Learner support could be obtained from existing universities, from
private sector providers or from groups that form on the Internet. Learning support from institutions would have to be charged back to learners; however, there is no doubt that with enough students enrolled in the courses, existing or new social software sites could be used as a vehicle for no-cost support.

4. Examinations: Examinations are, to some, learning tools that help learners measure whether they have gained competencies in a certain discipline. The varying learning modules would have self-exams at frequent points. However, both private and public institutions could offer rigorous testing opportunities at a fee so that students could determine whether they had mastered the subjects and skills.

5. Credentialing: The biggest single issue will be credentialing. No institution would be prepared to credential a course or an entire first-year program without a rigorous set of exams to determine whether the student had mastered appropriate competencies. Post-secondary institutions could charge for invigilated exams and for ensuring the appropriateness of the first-year credential. Some universities would have to be willing to participate in the credentialing exercise. Twelve in Canada have already expressed a willingness to do so.

I know that there are key questions that immediately come to mind? Who is paying the professors to write the courses? Who is paying for the research that underpins all learning? Remember, this is a proposal for a best first year. If it actually worked, academics and their institutions could focus on the second to fourth years of undergraduate study and on graduate studies. The scheme hold the promise of

- creating international standards
- focusing universities not on student readiness but on advanced knowledge
- initiating a re-evaluation of the post-secondary learning value chain
- forcing institutions to collaborate for the benefit of students

(The Author: Frits Pannekoek, President of ICDE & Athabasca University)
Higher education in the 21st century:  
the challenges for open and distance learning  

B.M. Gourley  

1. Introduction  
Ladies and gentlemen: we live in extraordinary times. Never before has the world been so prosperous, never before have so many people lived such long and healthy lives, never before have we witnessed such dazzling technology and never before have we reached, on average, such levels of education. And yet, in absolute numbers, never before have so many people lived in such poverty, never before have so many died from preventable diseases, never before has the planet been so threatened, never before have so many needed education. And it is education that fuels sustainable development, education that is fundamental to enlightened citizenship, to the peace and harmony – and even the continued life – of our species on this planet. It is an education which will have to reach many many more than hitherto, and an education which must be infused with the dramatic portent of our times – historic times where the extremes are not only unacceptable by any standards but capable of being solved with what we have between us.  

How are we doing in terms of numbers? I remind you of the UN Millennium Development Goals and Education for All programme of UNESCO, both of which secured commitment from a whole range of players. One must acknowledge that progress has been made but in terms of the number of people still not in basic education, much less secondary and tertiary education, there is a great deal more that needs to be done. We haven't enough schools, we haven't enough universities and we haven't enough teachers. What can be done?  

It is clear that, financially, building the vast infrastructure required by traditional bricks and mortar universities, colleges and schools to meet the demand is simply not a viable proposition – even if we could staff such an infrastructure. Governments, policy makers and donor bodies (as well as members of the public) will have come to a point where we have to accept there are other models, for HE at least, which can and do run in parallel with the conventional public sector - a sector which itself will have to change. Such models include:  

the private sector - which has grown at a remarkable pace in quite remarkable and innovative ways and is providing a significant percentage of provision in many countries, not just in the developing world;  
the Open and Distance University movement around the world - which is moving ahead in leaps and bounds. In India, for example, 24% of students in tertiary education are enrolled in institutions of this sort; and  
informal learning, non-traditional learning, learning made possible by the advances in technology, to which I will return shortly.
There can be no doubt that, in all quarters, higher education is changing quite dramatically. I would argue that change is happening more quickly in the private sector than in the public sector – and that may well be the profit motive working – but the fact remains that new and innovative ways are being found to meet not only the needs of the 21st century, but also the rights of people to be educated, both in the developed and developing countries. The question is whether innovation is being embraced quickly enough and whether we have reached a scale which is necessary to the task, whether technology can help us and whether there is any way we can bring more hands to the wheel.

I have found in reading through current literature on higher education that the metaphor of a ‘perfect storm’ is being used more often than one would expect, in quite diverse parts of the world. I find that reassuring because it means that there are more and more people realizing just how serious are the changes in higher education. You will remember that a perfect storm can only happen when a whole range of factors are in place and work together. There are of course different outcomes to storms depending on where you are and how you have secured yourself and your property. Being alert to the possibility is however the first step in making sure damage is avoided or at least managed – and maybe a transition to another infrastructure also managed.

I want to point to some of the factors and forces which are playing out at the moment and ask the question as to what they might mean for higher education – and whether it matters.

2. Factors creating a perfect storm

It is appropriate to very briefly remind you of the factors creating a perfect storm. We know that there are dramatic changes in demographics and we know that globalisation has already wrought massive change. Markets are more open than at any previous time, whole new economies are emerging and cultural boundaries are being redrawn. And to this must be added technological change, enabling much of what I refer to, but presenting ever more possibilities and potential. All of these changes promote intense competition, competition between nations, between economies and even universities. For universities in many ways are in the frontline of such competition.

For the purposes of understanding where competition comes from it is useful to think of the underlying forces in what many call a ‘new economy’. It is argued that market-driven and technology-enabled innovations have changed the way the economy is organised and the functional ‘rules’ have changed. Hence the title of Kevin Kelly’s influential book ‘New Rules for the new Economy’. At the core of these changes are “precisely those economic arrangements (that are) related to the collection, dissemination and management of information and knowledge: historically higher education’s core social functions.” (Schuster and Finkelstein, page 6).
Schuster and Finkelstein also argue that “the economic changes, especially in relation to information and knowledge, are associated with a major ideological and philosophical shift in how society views higher education, namely, increasingly as a private rather than a public good and as an “industry” that must be ever more open to competition within and from without rather than as a protected social institution.” (Page 6) This of course links to the growing privatisation of higher education. It may well be a concomitant of the so-called ‘massification’ of higher education where the demands on the public purse are too heavy and simply have to be shared, either with the student, or the employer, or any investor who is ready to provide the experience and make a profit in the process.

What is clear, however, is that the core functions of the university were based on what Carol Twigg calls “familiar technologies (the book, the classroom) and economic arrangements.” (Schuster and Finkelstein, page 9) And you change those technologies, change the economic arrangements, and the structure of the institutions themselves and the way they organise their activities also changes – and changes quite dramatically.

In developed countries, but also increasingly in less developed countries, technology has undoubtedly been a major catalyst for change. The Internet on its own has been dramatic enough but as other technologies have advanced we now live in a world where “merchants in Zambia use mobile phones for banking; farmers in Senegal use them to monitor prices; health workers in South Africa use them to update health records while visiting patients.” And we realize that although the personal computer changed so much and unleashed all sorts of innovation, it is “the pocket-size Ultra Mobile Device (UMD) - an all-in-one phone, personal organiser, movie camera, media player, PC and fashion statement” that will enable the “networked generation (that is, those in today’s infant classes)…to…look forward to an education in which they’ll be able to pick ‘n’ mix from the net, video-conferenced tutorials and DVD-quality distance learning packages which, because of the immediacy of the UMD, won’t seem in the least bit distant.” (Futurelab July 2007).

With this convergence of technologies (including near universal satellite coverage), we can now reach people where they are, wherever they are, making learning more accessible than ever before. This clearly has revolutionary potential for the educational endeavour. We already have students who are able to delegate one of their number to attend a lecture and podcast it to their classmates; students who can watch the very best academic performers on their internet sites and not suffer less than best at any particular university; students who can access more and more material on the internet's open content sites; students who can take one or more courses at universities across national (and certainly individual university) boundaries; students who indeed learn in whole new ways. These are students who are different from their predecessors – in technology terms they are also more sophisticated than their teachers.
In a recent article for Innovate, the Journal of Online Education, Catherine McLoughlin and Mark Lee describe a future where “social technologies coupled with a paradigm of learning focused on knowledge creation and community participation offer the potential for radical and transformational shifts in teaching and learning practices, allowing learners to access peers, experts, and the wider community in ways that enable reflective, self-directed learning.” This is of particular significance, they argue, “in a postsecondary education climate where there is likely to be continued blending and merging of informal and formal learning, where the value of textbooks and prescribed content is already being questioned, and where the open-source and open-content movements........are finally being recognized, supported and accepted” and can result in “educational experiences that are productive, engaging, and community based and that extend the learning landscape far beyond the boundaries of classrooms and educational institutions.”

The consequences for the system are colossal. The physical facilities have to be different; the nature of the materials produced has to be different – especially those that do not harness the technologies available; the material produced needs to match up to the best on open content sites; and, importantly, the ways of learning are different. And of course quality benchmarks are going to be different as well. In a world where the mobility of students is highly prized and competition intense - quality and quality assurance are very high on the agenda. Quality and associated ‘brand’ have probably never been more important. More and more universities for the first time are hiring marketing specialists and advertising consultants, conducting branding campaigns and generally behaving much the same as ordinary businesses do in a competitive environment. As students are being required to pay more for education, they are increasingly alert to their job prospects and to the economic value of degree offerings. As the realities of globalisation dawn on more and more people universities are doing more to internationalise their offerings.

And as the demand for higher education worldwide becomes ever more critical, more and more private sector businesses are moving in to the market. We now have ‘corporate’ universities which can tailor the material to their own preferred outcomes, and private for-profit providers such as US-owned Kaplan Inc, the University of Phoenix and Australia-based IBT Education which offer a whole range of disciplinary offerings. Most of these look very much like ordinary universities - and there are a growing number all over the world, even in developing countries. They have huge cost advantages and are building brand dramatically. There is no doubt they change the game.

Even the fundamental function of a university - research, more especially scientific research – has been dramatically changed. I remind you of the likes of InnoCentive, a company founded by the pharmaceutical Eli Lilly in 2001, an open, online platform that connects world-class scientists, engineers, professionals and entrepreneurs with companies to collaborate on complex scientific challenges. It
now has more than 145,000 engineers, scientists, inventors, business people, and research organizations in more than 175 countries interested in solving problems – and it represents a fundamental transformation in research and development.

Perhaps the most dramatic of the changes is the ‘unbundling’ or disaggregation of educational activities and processes, turning them into lots of different businesses – and that in turn changing the landscape in ways few of us could have dreamed about. It also changes the costings and pricing assumptions that we make at present. New providers have emerged that target specific activities and processes. Let me give you a small list of four to illustrate the point:

Firstly - you just have to think about organisations like Blackboard and eCollege (which is now owned by Pearsons). They provide the means for establishing online campuses as well as enhancing the academic programmes themselves. What they have facilitated is of course the whole e-learning business where traditional universities which were not really in competition with the OU (for example) are now very much in competition. The nature and value of this market is difficult to quantify but let there be no doubt it is there and growing.

Secondly - publishers and media companies have turned the textbook market into entirely new businesses. Think about Pearsons, Thomsons, Sage, and Elsevier. These are organisations which might have partnerships with universities which accredit their offerings – and those offerings I will remind you are mostly conceptualised, designed and written by top academics working part-time for handsome remuneration and unconstrained by faculty boards and animosities, senates and their internal politics, and bureaucracies and their geological time lines. Publishing, as an industry, has been deeply affected by technology, and in particular the Internet. Everybody is a publisher now – and scarcity has turned into abundance. Not only that, but models of authorship (and the vast collaborations made possible by the Web) have turned a range of traditional practices upside down. Pearsons, for example, no longer describe themselves as in the publishing business but rather the education business.

And thirdly - there are companies that offer remedial and supplemental educational services or counselling such as Sylvan Learning Systems (the original tutoring business now morphed into an internationally focussed higher education company called Laureate Education Inc) or Stanley Kaplan (owned by The Washington Post). Kaplan has already extended its reach into partnerships with several universities in the UK. Lest you imagine this is an American phenomenon, the front page article in the UK Times Higher Education last year (September 21, 2007) carried a story with the headline ‘private tuition booms’. One of the biggest in the UK reports a 40% increase in their business in the last two years. Even the business of assessment has private sector outsourcing to companies such as Edexcel. Nothing seems sacred. Pearsons now also own Edexcel.

Finally - there are others around (such as Teaching Company or Recorded Books) providing excellent lectures (catalogue lists over 300) by award winning academics. And then there is iTunes University, which delivers access to course
content from hundreds of colleges and universities (including The UK Open University!), so users can easily search, download, and play educational material just like they do music, movies, and TV shows. Add to this the increasing amount of online lecture content and Web resources and you have a whole new world. Overlay the whole concept of Web 2.0 on education and you will discover a whole new world indeed.

You may wonder why I spend so much time drawing your attention to these matters. I do so because I believe these trends have profound consequences for the business model upon which all universities run their operations – and because I believe that embracing the unprecedented opportunities offered by our global technologies is not only the major strategy for addressing the massive demand for higher education in the 21st century, but also for re-engaging youngsters with the education endeavour.

3. These changes prompt some tough questions in higher education. Just two examples.

Firstly we have to ask ourselves some serious questions about the production of some of our teaching materials, not only because the traditional model is an expensive one but also because it is relatively slow in a world growing so accustomed to the swift satisfaction of consumer needs. The OER movement is very significant in this respect: it has the capacity for reducing the cost of education, while at the same time diversifying the provision – especially in higher education. At the moment, for the most part, we have an expensive ‘business’ model where each university devises its own version of relatively straightforward material. One has to ask how different can undergraduate Chemistry or Physics be? The high level and expensive staff resource that presently goes towards presenting different courses to different students in various parts of the world is, to my mind, difficult to justify in the face of the pressing need to reduce cost and reach more people.

We also have to ask ourselves some questions as to how best we deliver ‘customer service’ and student support in this new world and how we harness the technology and the social networks it has spawned to enhance student support with peer-to-peer mentoring and collaborative learning models; how we deal with the shifting boundaries between formal and informal learning; how we harness the content that is being created on the internet in this remarkable new way. What we see on the Web are people from all over the world creating communities of interest (some of them very sophisticated indeed) on a whole range of subject matter – and what we need to do is ask ourselves how we harness this energy and recognise the learning – how we learn from how our students are using the internet and all its networks.

4. So what implications does this have for open and distance learning?

Quality: there are some who remain sceptical about the quality of the learning experience delivered via technology and cite the centrality of the conventional
face-to-face teacher-student relationship. Throughout its history, however, the OU in the UK has explored and exploited cutting-edge technological innovations to provide a high-quality, responsive and truly interactive open and supported learning environment. Indeed, the quality of our teaching has received the highest rating in the UK for student satisfaction for the third consecutive year in the 2007 National Student Survey. We use telephone and email of course, and we do have face-to-face (if students want it) and residential schools, but our virtual learning environments are astonishingly well used ................and students love it!! Wikis, blogs – you name it.

And then there is the rise of the Open Educational Resource movement - one of the most exciting developments made possible by the web. Several universities have placed educational resources on the web, free to use to people anywhere in the world – including the UK OU. You can imagine how significant this is for the many people who do not have access to decent libraries, textbooks and educational media. In the science and technology domains where Africa and elsewhere are so desperately short of people educated in these disciplines, it is manna from heaven. The Open University keeps statistics of the number of visitors to our OpenLearn site as do MIT and others who have joined the movement. The figures are astonishing, being accessed by millions and millions of users from virtually every country in the world.

One needs to understand however that it is universities mostly in the northern hemisphere which are making material available – and while the material relating to science might not be dominated by a particular world view (and even that could be contested), that relating to the humanities and social sciences is seriously deficient of material which would be recognisable and embraced by people whose cultures and traditions are very different. And that is before we begin thinking about language issues. These are non-trivial matters especially in the educational endeavour. If would-be and unconfident learners recognise nothing of what they know in educational materials, it is much more difficult for them to progress. We have a leadership challenge here for universities all over the world. It seems to me that if universities do not recognise the importance of changing the present dominance, it is difficult to imagine who would.

We can, however, take hope from projects such as the Commonwealth of Learning supported WikiEducator facility. WikiEducator is an online global community of scholars, teachers and trainers from remote locations who are committed to the collaborative authoring and development of free educational content for use in a variety of teaching situations. These OERs can then be re-contextualized and repackaged for use in their own teaching and learning situations. Launched in 2006, its use is growing rapidly with the number of registered users passing the 1500 mark and number of visits per month now exceeding 80,000.
5. In conclusion

Ladies and gentlemen - the wonderful thing is we have the means for education for many, many more people; not conventional education for the few (relatively speaking) who can travel the distances to physical sites of learning, more especially universities. That perforce will remain the privilege of the few. But our science, our technology, our imagination and our ingenuity have brought us now to a situation where we have other means.

There is now near universal satellite coverage, there is an internet which holds vast and ever-growing stores of knowledge, and we have learnt much about pedagogy and how to teach and learn in this new environment. Mobile telephones and other technologies have now converged - nowhere is this more potently displayed than in the new Apple iPhone. Technology prices are dropping all the time while robustness and reliability of the technology is dramatically increasing all the time. So it is an exciting time full of possibilities – possibilities way beyond any possibilities at any time in our history.

So my thesis today, ladies and gentlemen, is that we exploit the potential of the new technologies and embrace the distance education opportunities now rendered possible by them and also the networks they have spawned. And we do so in the conscious knowledge that they may well be central to the solution of many of the problems facing us in the 21st century – indeed as James Martin has reminded us, the very meaning of the 21st century is that we do solve these problems. Thank you.

( The Author: B.M. Gourley, Vice Chancellor of the Open University, U.K )

Bibliography

Transformation: Challenges and Opportunities – Vocational ODL in New Zealand

Paul Grimwood

It is an honour for me to address a group of such committed and capable people at this conference.

Overview

The intent of this paper is to consider the new “network” paradigm for tertiary education provision that is emerging in New Zealand under current Government policy reforms and to say something about the potential role of open and distance learning within this process.

While the New Zealand situation is in certain respects idiosyncratic, I hope the underlying themes and issues will be broad enough to provide some food for thought in relation to your own organisations and jurisdictions.

The network paradigm involves looking at individual teaching and learning institutions, and the learners in their “catchment” areas, in a new way.

Rather than operating only as stand-alone entities, institutions will increasingly operate within the wider context of a national network (and within various “sub-networks” constituted for particular purposes) which can provide learning services to individual institutions.

In turn the individual institutions may supply services to others in the network (although doing so is not a requirement to belong to the network.)

Implicitly I am introducing two concepts:

1. A network is a group of interconnected institutions which provide learning services to learners in their catchment area and/or to other institutions in the network to assist in their delivery to learners.

2. An institution and any satellite campuses are considered as a node in the network.

For the sake of clarity, and, in other contexts, to make use of findings in related disciplines, the rest of this address simply refers to “the nodes” and “the network”.

The question this paper begins to address, without any claim to have fully answered it, is:-

For the learners in the catchment area served by the network as a whole, how do we maximise the value of their learning from the assets, capabilities and capacities of the nodes in the network within an overall funding constraint while taking account of the constraints on each of the nodes?

The framework for discussion

At The Open Polytechnic of New Zealand we have been considering this question for several years now. As Government policy changes have been foreshadowed, then progressively enacted, we have sought to identify how a
specialist national open and distance learning provider such as The Open Polytechnic can help enable the network model. We are aware that related efforts are proceeding in other organisations.

In an attempt to be as clear as I can be in this address, I have adopted the following framework:-

1. A particular example is considered\(^1\):
   The learners engaging with the Institutes of Technology and Polytechnics (ITP) sector in New Zealand, in which The Open Polytechnic operates.

2. The Government’s Education Policy context in New Zealand is described.
   Recognising that this determines the boundaries within which the optimisation question posed earlier is to be answered.

3. Some of the characteristics of the nodes in the network are described.
   One purpose is to indicate that the nodes are quite different from each other.
   Given that this conference is mainly for people associated with distance learning and that The Open Polytechnic of New Zealand is an open and distance learning institution, it may not surprise you that more emphasis is on our own organisation than on the others.

4. The envisaged process for providing educational services to the learners is described.
   The premise is that the services can be supplied from any node in the network provided the capability and the capacity to do so exist at the node.

5. Some of the conclusions drawn, and some of the principles applicable in the New Zealand context, are noted.

6. Some thoughts on the possible implications for other learners, in other networks, in other contexts are proffered for discussion.

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**The learners served by the network**

The catchment area of tertiary learners is taken to be the whole of New Zealand\(^2\).

New Zealand is a small country by most standards. It is a long narrow country roughly the size of the United Kingdom. It has a total population about the size of Sydney in Australia, or Birmingham in the United Kingdom.

There are numerous types of tertiary institutions in New Zealand: 8 Universities, 20 Institutes of Technology and Polytechnics (ITPs), 3 Wananga (Maori Universities), some 40 Industry Training Organisations (ITOs), and hundreds of Private Training Establishments (PTEs).

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\(^1\) A later technical paper will explore the complexities of this situation in more detail.

\(^2\) New Zealand providers do meet the needs of some learners internationally, although the numbers are relatively small. The forthcoming technical paper referred to in footnote 1 will describe an analytical methodology able to accommodate both on and offshore learners.
The twenty ITPs can be compared with four equivalent institutions in Sydney, both serving similar populations. Another comparison is between the number of tertiary learners in New Zealand and in some other institutions internationally. The 31 publicly funded institutions in New Zealand provide learning to less than half a million learners. I am aware that some of my colleagues on SCOP have over a million learners in a single institution.

If we were starting with a blank sheet of paper in New Zealand I very much doubt that we would create 30 or so publicly funded tertiary institutions. The reality, however, is that we have them. The challenge is to extract as much value from the investment they represent, for the benefit of learners and the nation.

In general, the different types of providers appeal to different kinds of learners, even though there may be some similarities in the course/programme offerings in parts of their portfolios.

For the purposes of this address I have adopted the following descriptors:

"The learners": Those tertiary learners who consider themselves best served by the 20 ITPs.

“The network”: The 20 ITPs, interconnected and considered collectively.

“A node”: An ITP, including any satellite delivery points (campuses) it has.

The Government’s Education Policy in New Zealand

As noted earlier, New Zealand is currently undergoing a new and significant period of tertiary education policy reform.

The watchwords are “quality”, “relevance” and “access”.

Under the reforms the Government is seeking a stronger emphasis on measured outcomes in tertiary education, closely linked to New Zealand’s economic and social transformation goals.

It wants stronger steering and guidance from the centre to ensure this happens.

It wants institutions to view themselves less as stand-alone entities, and more as collaborators supporting what is described in policy terms as a “national network of provision.”

Exactly what a “network of provision” might constitute and how it might operate on the ground is still the subject of ongoing debate, discussion and thinking.

Certain elements are clear, however. Previously funding was determined solely by student enrolments, with a consequent incentive for institutions to pursue competitive behaviours. Under the new policy, funding is now delivered through a broader-based “investment” approach.

Enrolments are allocated to individual institutions after negotiation with the centre and capped over a three-year planning horizon.

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3 This simplification is intended to promote clarity. The forthcoming technical paper referred to in footnote 1 will explore the complexities in more detail.
The change is from delivery by individual institutions responding to market forces to delivery by a network of collaborating entities steered – lightly we hope - from the centre.

For a range of reasons, the ITP sub-sector is at the sharp end of the reform process.

It is also the test-bed for another key aspect of the policy reforms – a focus on regionally-based provision.

During the more competitive "free market" system that operated prior to the current reforms, ITPs were able to offer courses and open campuses wherever they chose to do so.

In the chase for student enrolments, it made sense for institutions in regions with a lower population base to open sites in regions with a larger population base – particularly in New Zealand’s largest and fastest-growing urban area, Auckland.

Under the current reforms, however, the Government wants ITPs to return to their local roots. It wants them to focus on serving their local and regional communities and industries. It wants a pull-back from “out-of-region” provision.

The exceptions will be niche programmes in areas of specialist capability that will have the green-light for national delivery.

The nodes in the network

The 20 nodes in the ITP network vary widely.

Some deliver wide portfolios in urban conurbations, with other providers in the same conurbation. Others deliver in somewhat smaller cities with one or two other providers. Still others are in smaller provincial cities and so deliver correspondingly narrow portfolios. There are even smaller ones, serving small populations with a narrow portfolio.

Size is not the only distinguishing characteristic. The nature of the offerings also varies widely.

For whatever reason, perhaps historical, perhaps because of local demand, some nodes offer niche provision nationally. This characteristic seems unrelated to the size of the institution.

These are just two examples of the differing attributes of the nodes of the network.

For the purposes of this address, it is relevant to recognise that the emergence of e-learning has meant that the capability traditionally associated with the nodes is changing. There is an increase in the ways learners in contact institutions can access their learning. There is an increasing capability to deliver at distance.

Does this imply that the pundits who espouse convergence will come into their own? I doubt it. I am not the first to doubt. Others have their reasons. As do we. Ours are quantitatively founded.

We have looked at the economic cost to New Zealand of establishing self sufficient e-capability at each of the nodes in the ITP network. We have also considered the cost of providing all e-capability from a single entity, thus extracting maximum value from the economies of scale associated with e-learning, and the need for a critical mass of appropriately qualified people.
The difference in cost is, in NPV terms, over $2 billion NZD. The precise amount depends on the time horizon and the discount rate, among other variables. This can be compared with the total amount New Zealand allocates to all tertiary education annually, about $2.5 billion.

The examples I have given are, of course, ends of a continuum.

I do not for a moment suggest that the actual situation will be one or other of the two ends of the spectrum. All sorts of criteria, not just the economic cost to New Zealand, will affect the extent to which convergence takes place.

The other variables affecting the choices about e-learning do not affect a key conclusion. Convergence as the pundits would have it – the demise of the difference between contact and distance – will not, in my view, occur. This is not for technological reasons but for economic ones – we simply cannot afford it.

The challenge for all of us in New Zealand is:-

How do we address the optimising question posed earlier taking into account not only how the nodes are now but how they might be in the future?

This segment of my address introduces the notion that nodes are different from one another - and the differences need to be taken into account. Furthermore, the differences will change over time – and these need to be taken into account over time.

**One of the nodes**

Earlier I indicated that, for a couple of reasons, I would consider The Open Polytechnic of New Zealand in more detail than the other nodes.

The Open Polytechnic of New Zealand:-

- Is a national provider, at a time when government policy emphasises regional provision
- Is an open and distance learning (ODL) institution
- Enrols 30,000+ learners annually
  - This is the largest number of learners of any ITP in New Zealand. Yet, as you are well aware, it is a minnow by world standards.
- Delivers applied vocational learning, mainly at certificate to degree levels.
- Originated as a paper based provider some sixty years ago.
- Now delivers in multiple modes.
- Has been assessed independently as having the most developed capability in e-learning of all ITPs in New Zealand.
- Is recognised internationally: the Commonwealth of Learning Award for Excellence in Distance Education; the Mellon Award for its contributions in e-learning.

Significantly when considering the network identified in this address, The Open Polytechnic recognises the economies of scale associated with ODL institutions. It also recognises the characteristics of the contact institutions that comprise the other nodes in the network. One is that they do not have the economies of scale associated with an ODL institution. Neither have they
traditionally had the internal structures, processes or pedagogies to support ODL.

Some ITP institutions are beginning to develop these attributes. It seems to me that, in the process, they are beginning to recognise the capability requirements and the financial implications of operating dual mode institutions. They are beginning to recognise, as you know well, how daunting those capability and financial issues are.

Other ITPs have recognised that it is beyond their funding capabilities to replicate for their (relatively small) learner population a self sufficient ODL capability. For example, six institutions wish our institution to design, develop and deliver with them a blended business degree (delivered online and supported by them in face-to-face mode).

In this instance, the complementary attributes of the two different kinds of organisation, blurred as the differences may be from the effects of convergence, provide opportunities for adding value to the learner.

Apart from the pride I have in the capability of the people in my own institution, I have drawn attention to the characteristics of The Open Polytechnic for two reasons:-

- To engage with all of you in ODL institutions
- To pave the way for discussing how the network can be optimised.

**Collaborative provision**

As I have indicated earlier the ITP network consists of 20 interconnected institutions.

I have visited each of these institutions, some of them many times. They have their own character and attributes. A casual observer would see them as being very different. There is considerable advantage to the institution in being able to offer a unique “face” to their learners.

In our work on identifying how to optimise the network, we came to recognise that 19 of the 20 had essentially similar models for the delivery of learning. It is an institution-centric model: learners come into the institution’s world. One organisation, ours, is different: we go into the learner’s world.

That difference is pivotal.

It enables the network to access synergies not available to the 19 other institutions. It means that both learners in New Zealand and the nation as a whole can derive greater benefit from having “19 similar and a different one” than from 20 similar organisations.

As an ODL entity with economies of scale and capabilities, strategies, processes and systems to go with those economies, we are complementary to mainly campus based institutions.

A significant difference is that economies of scale are not present in mainly contact based institutions in the same way or to the same degree.

You might ask: “What is the significance of that?”

Let me respond with an example.

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4 I have acknowledged earlier that some institutions are developing some e-distance capability. I observe that this is still rooted in a contact framework, in the main. Technology is being used to (attempt to) replicate the contact experience.
One node in the network has a region where there are about 250,000 potential learners. Only about 75,000 are able to access the institution in a practical way. Some are too far away. Others have work schedules that do not mesh with class times. Still others prefer working in their own time and place.

This is familiar territory for those in ODL provision.

That institution and ours aim to operate collaboratively, taking advantage of the different characteristics of both organisations. We will deliver to the partner’s region at a distance.

The learners will access support form the local partner at agreed times, but much less frequently than required by contact delivery. The learner experience is enhanced to the benefit of the learner and, in the process, to both institutions.

A reflection on both institutions’ part is that if New Zealand did not have ODL capability already developed, it would either have to develop it, or establish more contact institutions of a similar kind to those already existing.

As an indicator, we have calculated that it would cost New Zealand about $1.4 billion (NPV at 5 and 10 % over ten or twenty years) to replicate our distance capabilities in the other nineteen institutions in the network.

Our analyses and our thinking confirm that optimising an institution in a region of New Zealand, in isolation, small as those regions are, precludes accessing economies of scale, in particular those associated with ODL, in whatever mode it operates. It costs the nation.

A conclusion emerges. For us it happened over time. Perhaps for you it is self evident.

For many reasons, some I have touched on in this address, it is imperative we focus on optimising the network in New Zealand. It is not enough to consider the nodes individually, if we are to maximise the value from the system for learners throughout New Zealand.

The optimising process

The approach to optimisation is deceptively straightforward.

It starts by recognising that after all the advocacy for greater allocations from the public purse for tertiary education, there is a limit, for tertiary education generally, and for the ITP network we are considering, in particular.

In politically practical terms, it is a given that the 20 nodes in the network will remain, and will continue to provide their traditional services. That implies that there will be a level of funding provided to maintain a node and its ability to deliver its traditional portfolio.

In conceptual terms, the network is optimised when the maximum value to learners served by the network is achieved within the funding constraint.

In linear programming terms, this objective function can be recast as its dual: for a given configuration of courses and programmes, what is the minimum cost of providing them?

The optimising process begins when changes to the portfolios at the nodes are contemplated.

The decision rule is straightforward: the value to learners is optimised for learners when courses and programmes are sourced from the lowest-cost source in the network.
For the network being considered in New Zealand, 19 nodes are similar in their business models (they are essentially contact institutions). With these nodes, there is little that can they can offer to other nodes by way of less expensive courses and programmes.

Because of the physical distance between the nodes and the limited economies of scale of the nodes, it is a better option to develop the capability to deliver at the node.

So a node has options when other nodes offer economies of scale. It can offer a wider degree of courses and programmes to its catchment area for the same level of funding if it has access to nodes which have economies of scale, and deliver the courses and programmes of interest to the node.

One can envisage a planning process at each node. It comes as a series of questions:-

- What do learners in my region seek?
- What does it cost to provide their needs if we design, develop and deliver the learning?
- What can we acquire from other nodes in the network that meets all our requirements, including quality, at a lower cost?

In order to follow this process all sorts of information needs to be freely available at all the nodes in the network. Furthermore, there need to be incentives for each node to act so as to optimise the whole network, not simply the situation for the node.

There is much work to be done to take the concept into an operating reality. To this point we are comfortable that in terms of The Open Polytechnic’s potential contribution we have ways of dealing with the challenges.

**The optimising principles**

Our organisation does not claim to have identified all the optimising principles. We have simply discovered some along the way.

- Optimising the situation for each of the nodes in isolation does not optimise the situation for the network as a whole.
- Aggregating distance capability, not necessarily to a single node but in that direction, is consistent with optimisation.
- There is value to the network in promoting delivery of similar national qualifications, as opposed to nodally distinct qualifications.
- Decision processes within the nodes need to be incentivised to choose options contributing to optimising the network while achieving a satisfactory outcome for the node.
- Large enrolment courses and programmes will gravitate to organisations with economies of scale when optimisation of the network is being sought.

As I stand back and think about these principles, I am affected by a conclusion that we have been working with for a long while. All our nodes have capabilities. They are different capabilities. The network is optimised

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5 I am appreciative of the continuing engagement with the Tertiary Education Commission of New Zealand as The Open Polytechnic seeks to contribute to ongoing discussion and thinking regarding optimisation of the network of provision.
when we all tap into those capabilities, not when we try to replicate those capabilities in each of the nodes.

Transforming The Open Polytechnic

The strategic drive of The Open Polytechnic of New Zealand is to prepare ourselves for contributing within the emerging network environment.

Whatever its final form, that environment will involve a much greater degree of flexible partnering and collaboration.

We see a natural role for The Open Polytechnic in supporting and enabling a network model of the type I have been describing.

This ranges from supporting e-distance capability building, providing shared resources and services, and various forms of flexible blended delivery arrangements, to continuing to support distinctive segments of distance learners.

It is a given that we will retain and build on our established capability in open and distance learning. But we do not see this as being our sole distinguishing characteristic in the future.

We see ourselves increasingly operating as an ‘intermediary’ – brokering flexible learning services and resources for partners, sourced both from within our organisation and externally.

Relationship management will therefore be a new key competency for our organisation; as will innovation in learning design, and in forging and supporting flexible learning partnerships.

Our governing principle will be to act in ways that deliver value for learners and the nation.

Some possible implications in other contexts

I approach this section with temerity!

Who am I to preach to my colleagues operating in other contexts?

I have no right and make no claims.

I simply share with you some of the thoughts we have had along the way.

Make of them what you will.

We would enjoy your sharing with us what your situation is and how you are approaching it.

We can learn from it.

You will inform development of education in New Zealand as well as your own country.

One of our thoughts is that optimising the network is very dependent on the context.

We thought of the US. We saw a much higher population density. Nodes are in close proximity. There seems to be so much more opportunity to create ways in which organisations can be collaborative.

For example, in New Zealand our nodes are generally widely dispersed. It is not unusual for them to be 150 km from their neighbours in the network, though some are much closer. In the US we envisage that potential nodes can be less than 30 km. It seems to us that there may be other ways of optimising delivery in the region.

We thought of remote parts of Africa. We acknowledged the remoteness. We thought of the network as being bounded by the technology it could
access. We saw the principles as still applying, but in ways producing very different outcomes from the New Zealand setting.

We thought of China. We are aware that television is ubiquitous. We understand while rapidly growing in use cell phones are not yet ubiquitous, nor is the internet. Again it seemed to us that the principles may be applicable, but likely with different outcomes.

In this section I am not trying to be prescriptive. I am simply saying that we are conscious of you all, in your environments – and would like to engage with you in them.

**Next steps**

We are proceeding with our analytical initiatives.

We are confident that there are ways in which we can quantify the value of optimising the network in the way I have described.

We aim to gather our colleagues in implementing optimisation of the network.

We will keep you in touch with our progress, if you would like. Please let us know – and we will follow up.

(The Author: Paul Grimwood, Chief Executive, The Open Polytechnic of New Zealand)
New Forms of Managing Distance Education Institutions: Advancing open distance learning in Africa

N. Barney Pityana

I wish to thank the president of the Shanghai TV University and the organizers of global forum for the invitation to speak at this plenary session at this very very important forum. I wish to acknowledge with thanks and to particularly thank the organizers for organizing, as all of us have been saying, what is by all standards, a most agreeable wonderful time here in Shanghai for all of us.

I was given a topic, New Forms of Managing Distance Education Institutions. I decided not to temper with that topic. I do not know why I was given a topic like that, supposed because of being a vice chancellor for far too long. And I have some words of wisdom to offer to those of you, young of vice chancellors than I am. But I have to say quite upfront that in fact as you heard I am no expert in management theories at all. So I will try to offer from my experience, some sense in which I understand managing higher education institutions, I’ve decided also not to focus too much on distance education institutions. Because I do have a sense of excepting in small ways that managing distance education institutions is no different really from managing higher education institutions in general. I had it in mind that this paper should be in two forms. I had in mind that I wanted to rarely spend the first part of the paper. Rarely reflecting in some principled way what I regard as critical principles in leadership and management of higher education. Then I thought I need to route those principles in some sort of case study, and I thought I would do a case study of the University of South Africa, because of that’s a place I know best. But of what I decided, that’s not very very good. And some of you might think I’m a very vain character who really knows all about talking about himself and I thought I wouldn’t dare to do that to all of you. So I’m afraid you are going to get the first part.

The second part you will get part of this that will be published one day. The term “Knowledge Society” is as elusive as it is deceptive. Similar simple in its evocation of a more of us global society driven by the generative force of shed knowledge and information of curiosity about the unknown and unknowable. And thinking means of tools of unlocking the secret of nature. In truth, It consumes or even ignores a million complex of and deeply embedded its sub-systems of knowledge, cultural dynamics and power relations that have shaped individual societies for centuries and have given form content and meaning to the lives of those inhabited societal spaces.

Oh, as I did that you do not haste to circuit to the real of instantly accessible knowledge and to neatly compartment arise it into digestible and easily exportable and marketable offerings. You may have lost the very essence of the creative force informed by our cultural diversity that is marked our evolution and thriven us to even
greater heights. The unrestricted access to knowledge that resolve fervently desire come that price, often ignored and which I supposed could be termed sameness, maybe in danger of becoming at the other collector-less mass of educational homogeneity. Extolling and chasing after the most recent technological innovations, that we learn change even more deeply prevailing generally western Canons, knowing full well. That it is only the fortunate few, that will derive the benefits for the rest of us. We’d like to expend their energies fruitlessly, pursuing an impossible educational nirvana, which ironically in many cases we find little residents, with the philosophies and cultures of those who must be educated. This is particularly true of education in the African continent and a suspect in much of global surf.

In our striding towards more efficient administration in management of higher education institutions, we have becoming increasingly managerialistic in practice, given the neoliberal free market approach, too governance in most democratic countries, buttressed and embedded as it is directly involving technology. It is perhaps inevitable that higher education has to a great extent or greater to a less extent assume the nature of a beast. They’ll become new business, operated and managed according to acknowledge business principles. Our students now are clients and our courseware is a product range. We have commodified education and knowledge. It is in fact a seductive trend for muffling higher education institutions into businesses. We are cruel to ourselves practical detachment. That our companies’ decisions base purely on business efficiencies. And in doing so, we stand to lose sight of that creative impulse that exists in the imagination that informs new knowledge and stimulus desire to mantle of future generations into new ways of knowing. We are in danger of losing the mistake of knowledge and the e-source passion and professional pride that accompanies its generation. I take the view collapse contrary to the receive wisdom of WTO in gets. But higher education is a national resource, a common good. It can not and does not exist outside of the development of framework of any society.

The Magna Carta, for example, after by directors of European universities in Buluniya in 1998, expresses the sentiment rather boldly. And I quote that at the approaching end of this millennium, the future of mankind depends largely on cultural, scientific and technical advancement. And that this is built up in centers of culture, knowledge, and research as represented by true universities uncode. Clearly, education has a pivotal role to play in the development of society. Education opens up vista of knowledge and possibility, it equips citizens with life skills, builds character, and unnobles the ordinary, and it builds up people with understanding, and with tools engaged their environment. It connects them with their culture, with their scientific world, and with their future, fundamental to any value that can be extracted from higher education therefore.

Is that higher education institutions (sorry, I’m missing a page) must have the means and the capacity to advance their historic mission in teaching, learning, research, and community engagement, they must be centers of knowledge generation or scientific advancement and innovation. And they must produce the
next generation of refined citizens, and knowledge under pronounce. Higher education institutions must produce citizens with learning sufficient for them to take their places in society, and to make their contribution to their own self-fulfillment and societal advancement. Be on that higher education must contribute to the store of knowledge in our scientific endeavours. That will aid planning and policy, and research and evidence that equip society with their better understanding of itself and the challenges it traces. Above all it must nurture and discern talent, and cultivate the leadership potential that is embedded in all our use. It is also our responsibility to nurture creative and critical talent, and wish rich academics will come. And we must act as role models for any who might be attracted to academic careers. That level of quality human capital is essential for any development of state.

Clearly we already have new forms of management in higher education, and we have no option but to embrace them. And someone between the opposite ends of the above mentioned higher education continue desire the vast majority of higher education institutions trying as best as they can to offer a meaningful and quality education within the contest of increasingly sophisticated and diverse global environment. Given the speed at which global changes currently taking place, the current global financial crisis and the case in point, that one suspects that higher education institutions will have to be increasingly creative and innovative in determining and articulating society’s needs and in developing management frameworks that will best serve those needs; one further suspects that increasingly given the global financial constraints. It has to be done in some sorts of financial or other partnerships, if one airs to the above mentioned dynamics. They continue to ever growing demand for access to higher education the world over, especially for people from disadvantage background and communities. The accelerate proliferation of technologies that I’m having a fundamental impact on our societies. The emergence of open education resources and virtual learning are too mentioned but a few. Then it is evident that open distance learning offers a variable option to many nations particularly the so called emerging nations.

Likewise, Universities have to content with the changing demographic of student population. In the area of alightment student not only have aspirations and expectations, they also have demands. They understand themselves to be customers. They have rights. They have opinions. And they are active and engaged learners, likewise students of our time, I also technologically survey, and live and learn and engage with through all kinds of targets. The fact is that the learning environment has changed irretrievably or other irreversibly. The institutions have to respond appropriately in their teaching methods, in constructing appropriate learning environments, in appropriate assessment, in establishing values and ethics. The learner is an active participant. And academic management must take account of the new student, their values, their social world, and a frame of the centrality of the student in the learning environment, frankly, in a right speech and environment with student rights matters and they know it. They demand to be treated in a
manner that respects their human dignity, with opinions matter and will learning become as a facilitative and a neighboring system. That means that the teacher is no longer the all powerful bedder of knowledge and wisdom, and educators cannot succeed in the traditional authoritarian manner. Yes, student still demand accountability from their lecturers.

Managing higher education therefore requires smart achieve of resources, financial, human, technological, intellectual, creativity and innovation, with some are of aggressiveness in pursuing imaginatively the best interests of the institution, the diplomating relations with government, donors and millions of other partners. The political are in managing the power relations within the institution between the various competing interests, and in positioning the institution of the public ground against all competition. Like all management, leadership of higher education institutions calls for the power of judgment on the part of any executive management. Often mistakes are made, but advancement arises from lessons learned from mistakes. I've often maintained that universities have become corporations, so I get on this. Universities thrive on traditions that become and trenched, and I'm not going away too easily, universities are at best are serve governing collective of peers and their students, for collectively take responsibility for the institution, for the academic reputation and image, its financial capacity, and their academic resource generates. That is the reason the university senate is such a powerful institution.

The art of leadership in such an institution can best be described as four site—keeping always ahead of the pack, guiding, and power of persuasion and influence. I believe that one best achieves in a university by a ream of finance and justice at all times, by treating all colleagues impartially and equally, respectfully and with dignity, and bidding by the rules and implementing policies fairly and consistently. I believe that it is not the office of the vice-chancellor or president of such that evokes for respect in their academic community. What I am afraid is how to earn respect of one' colleagues as a leader and manager, academic and intellectual competence, management with integrity and treating everyone with dignity.

Universities as I said have also become conglomeracy. Higher education is becoming a multibillion-dollar industry. It is no longer an industry that is confined within national boundaries. Its products are marketed across boarders and cultures. And it brings into their academic arena a diverse mix of cultures and traditions. Universities in any event are hardly liked to be wholly financed and sustained from the public purse, governments’ dynamics and regulate universities, but their financial contributions have become a diminishing revenue in university budgets. Government is a vital partner to universities, however, as a guide of tour of standards and of quality, by setting and enabling regulatory machinery. But their relationship with government will always be sensitive, because universities must guard against invasion of institutional autonomy and academic freedom. The finding mechanism therefore must be clear, defensible and predicable. University
vice-chancellors must never be refused to be supplicants, who beg for favors from government. There can be no doubt that uneasy as university systems pretend that the management practices of vital for business of higher education. After all we deal with huge budget; we manage large sums of money and trust to us by donors.

Students pay fees and they are entitled to fair returns. Staffs also have issues of job security and career advancement. We employ a large numbers of staff; we contribute to the economy of our cities wherever large universities are. Plant, property and equipment must be acquired, maintained, renewed, replaced as appropriate. Facilities must be provided. Process of systems need to be put in place. The university is a modern institution. And to the extent it is related to all sectors of society with other institutions. It must keep up with its partners, if it's to benefit from the technology and scientific advancement.

The reason of current global crisis in the financial markets is of relevance to university. It is no doubt due to the fact that universities are major investors, and they are also borrowers of capital from the banks. We are hit by the credit crunch, a time we experience cash flu problems. And we are fluctuated with our interests' rates that affect our budgeting processes. We are like any other business in that regard. We all know that academic colleagues are very scaring about what is come to be known as a new managerialism. What this means is that the universities have learned management practices from business. And they applied them to universities' situations and critically and often inappropriately. There is a view that the universities are not appropriate places for the application of the modern business management practices. They do not fit into academic institutional cultures, because it is said they undermine academic traditions. They reduce the influence of academics in the management and in the direction of their disciplines. They separate management from academics. They often bring in people it is suggested who know nothing about disciplinary, about academic disciplines. And such, they tend to be out of discipline insensitively to violate the secret principles of academic freedom. They subject academics to processes of accountability. That it is alleged have no places in their academy, so the argument goes.

But the reality is different. It isn’t interests of university as a whole that there is a leadership and management that coheres and that guides and that can behave accountable. The university’s sustenance, its reputation and image depend on the industry and diligent of its academic staff in teaching, research and community engagement. These days it matters most whether students succeed in their studies or not that academic staff maintain a rigorous research output, that academics are involved in public policy and engagement, because it affects the bottom line and the core business of the university. Before-mentioned management therefore has become a necessary part of university management.

It is equally important that management and governance mechanism are accountable and consultative. And their decision making must eventually be effective, and must advanced the mission of the university. No decision making processes need to be interminable. Neither must decisions that have to be made
beheld to wrestle by some vested interests that one often finds at universities, nor should voice of the minority ultimately thought progress. Universities are often undermined and discredited by decision making processes that get no way. New forms of management in higher education are necessitated. But the new demands of technology of expertise required, to manage a large institution of new tools for understanding and utilizing human resources with their constraints and opportunities, of information management and of business intelligence, of necessity universities are becoming diverse places of quanti-station and opportunity, of creativity and egotism, of political power play and ingenuity, of cultural and intellectual contestation.

At the end of the day, a university has to be a place of overall pursuit of excellence and continuous improvement of quality in all its service and products. For all that, a vice-chancellor must depend upon the expertise of his or her colleagues. He must once carefully selected, trust them, support them, guide them in the exercise of their duties, and must endeavor to retain skills for the good of the institution. As vice-chancellor one must be able to be rely on one’s colleague and finance, ICT, information and communications, league and human resources, research academic matters. The vice chancellor must receive all demand, regular preference, must ask partners’ questions, test advice against policy, chart the way forward and ultimately take responsibility. As vice chancellor, one can not afford to be hands off. At the same time, it is not possible to micro-manage a large institution, otherwise one could get swam in the minuet of operational detail. As one vice chancellor one must be aware of management in leadership by consultation. That means that one should be available to make sure the vital institutional structures and status, must test opinion at all times, see concessions and communicate, communicate, communicate. This communication process includes consultation with chairperson of the counsel aboard of the university. As the deliver of governance and policy in this institution, with other governance structures, like senate and student representative counsel. The vice-chancellor, as the leader of institution, must also be visible. The vice-chancellor must be visible on behalf of the institution in the public debates of education and other society of issues, must be visible among colleagues and peers, vice-chancellors and presidents, must participate actively in the higher education sector, and contribute to us shape in policy. Must be visible within the institution in seminars, in debates, and in walkabouts; must make people in situations formal and informal, must converse with the students on the lift whatever they may be. It is imperative that the vice-chancellor must cultivated collaborative relationships with his or her fellow vice-chancellors, it engenders confidence and creates good will, make no mistake. The university also functions by creating good will among all sectors of the university community, and with society at large. Whatever forms of management adopted though, it is crucial that creativity and innovation should never be frustrated or throttled by bad management. In order to do so, the university must adopt the learning organization model. At the heart of this is an ablement of experimentation
of testing, of discovery. Every person in the organization should operate from a learning parody, thick advancement of the ideas and test them with colleagues that every manager must discuss with colleagues how a learning environment may be cultivated and entrenched. And every individual should develop his or her own individual learning processes within the organization. And that quality as a process of continuous improvement should be embedded in the culture of the organization. Learning becomes a critical part of institutional advancement.

May I leave you colleagues with two pieces of advice? The first is that please subscribe to the Harvard Business Review, and keep it at hand as you point your management practice and design strategies. Second, subscribe to AGU (American Graduate University) course that wonderful resource on managing ICTs and higher education for the practitioner in a modern connected or networked higher education environment. These I have found to be worthy companions for the modernist manager in the higher education.

( The Author: N. Barney Pityana, Vice Chancellor of the University of South Africa )
Overcoming Obstacles in Building the Learning City:  
The Case of Brazil  

Fredric M. Litto*

The history of formal learning offers examples of centers of excellence in both isolated non-urban settings and densely-populated metropolitan clusters, each providing an environment for work and study appropriate to its surroundings. There can be no doubt, however, that the new world of digital communications will permit the increasing democratization of access to knowledge and to the certification of competencies. If, in the past, there was a tendency for many to flock to cities to be among skilled professionals, to take advantage of the comforts of a consumer’s marketplace, and to prosper amid the opportunities to innovate and to grow through the rich exchange of ideas, then the new information technologies will diminish whatever differences previously existed between towns and cities, between the periphery and the center.

I. The Importance of Cities for Capacity-Building

"Learning cities" are population centers, both large and small, which reflect the new values of the knowledge society—namely, that people constantly acquire and produce new information as an economic activity and as a form of leisure. They represent one of several regional development strategies, offering “a mix of resources,” and serving as “incubators for the knowledge society.” Possessing institutional structures featuring modern technologies and workers with cosmopolitan values, learning cities have in common several clearly identifiable characteristics:

■ Explicit commitment to placing innovation and learning at the core of development;
■ Priorities for lifelong learning, innovation, and the creative uses of information and communication technologies;
■ Subtitles like: Cities Without Walls; Educational Cities; Ideopolis-Knowledge City Regions; Digital Cities; Digital Communities; Intelligent Communities; Information Cities; e-Cities.1

Although many such cities are small and hardly known outside of their local regions, several large metropolises have inaugurated activities which fall under the heading of learning cities, among them Seoul, Singapore, Tokyo, Hong Kong, Stockholm, San Francisco, Tallinn (Estonia), New York, Beijing and New Songdo City (Korea). But none of these large cities as yet gives free Internet access to all of its citizens.

What are the benefits to individuals in learning cities?
■ "Acquisition of knowledge, skills and understanding…formally or informally;
"Improved wages and employment opportunities."
And the benefits to institutions and society?
"A more flexible and technologically up-to-date workforce;
Learning for competitiveness;
Partnerships of towns, cities and regions…collective learning…continuous
exchange and flow of information about products, processes and work
organizations…based on stability and trust."²

Brazil, a country which covers about half of the continent of South America
and about half of its population, at the present time is the world’s tenth largest
economy, but it demonstrates a need for serious capacity-building. Almost at
every step of the educational process we find results that fall short of the demands
of a society in the knowledge era.

In 2007, PISA, the well-known OECD annual evaluation of the learning
performance of 15-year-old students in a large group of countries, was revealing.
In the area of Reading Comprehension ("understanding ambiguities, formulating
hypotheses and critically evaluating prepared texts), while the students in Finland
achieved the highest rating (over 80% did well on the test), those in Brazil were
among the weakest (only 25% did well). Likewise, in a World Bank study in early
2008, evaluating young people in Latin America, 10-14 years of age enrolled in
primary education, those from Brazil did extremely poorly.

Of the 19 countries included in the study, Brazil ranked 15th (behind
Bolivia, Peru, Paraguay and the Dominican Republic);
The top-ranked countries: Chile, Jamaica, Argentina;
Below Brazil: El Salvador, Honduras, Nicaragua, Guatemala;
"Schooled Illiterates" – a term taken from another World Bank study of
Brazilian children 7-14 years of age, and in school – 87% cannot read and
write.³

The Brazilian Institute of Geography and Statistics earlier this year revealed
that while in 1997 the Brazilian population had 5.8 years of formal schooling, in
2007 this figure rose to only 7.3 years.

Brazil invests less than it should in Research and Development, as shown in a
recent OECD study:
Average of the 29 countries of OECD: 2.4% of GNP
Chile: 1.2% of GNP
Brazil: 1% of GNP

In 2004, of 72,000 industrial companies in Brazil:
1.7% invested significantly in R & D
But this small group grossed 30% more than its competitors, had greater
profits, exported more, and paid better salaries
Of course, it is difficult to say with confidence whether the investment in R & D brought about the success, or whether the success permitted the investment.

Brazil currently has only 17% of its college students studying with engineering, science and mathematics as their major fields. A recent study of where Brazilians who had obtained doctoral degrees were working revealed that:

- In 2004 8,094 doctoral degrees were awarded (10th place in the world).
- But Brazil is only in 27th position (in relation to 1:100k population).
- Of the total of doctoral degrees in 2004, those in science/engineering (4726) represented 58.4%.
- Plan for 2010: 16,000 doctoral-degrees awarded annually
- Where do doctoral degree holders work: education (44%); public administration (43%); unaccounted for [unemployed? changed profession?] (13%).

There is a serious deficit of engineers in Brazil, both in total numbers graduating each year, as well as in relation to those graduating in all other academic fields, as this comparative chart demonstrates.

### Deficit of Engineers in Brazil

<table>
<thead>
<tr>
<th>Country</th>
<th>Annual Grads.</th>
<th>Grads/ % of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>41,491</td>
<td>5.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>39,276</td>
<td>12.6%</td>
</tr>
<tr>
<td>Japan</td>
<td>130,986</td>
<td>19.7%</td>
</tr>
<tr>
<td>Korea</td>
<td>79,622</td>
<td>26%</td>
</tr>
<tr>
<td>Mexico</td>
<td>55,864</td>
<td>14.3%</td>
</tr>
<tr>
<td>United States</td>
<td>138,134</td>
<td>6.2%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>45,347</td>
<td>8.8%</td>
</tr>
</tbody>
</table>

The International Labor Organization of the United Nation predicts that the growth of renewable sources of energy will create 20 million new jobs around the world by 2030. 12 million alone will be in the area of ethanol, the biofuel made from sugar cane, corn and other renewable sources. Over the last three decades, Brazil has invested heavily in ethanol technology and now represents 53% of the world’s ethanol trade, in addition to having as “flex-fuel vehicles” (running on ethanol, gasoline ou natural gas) 70% of its domestic automobiles. But for Brazil to meet its goal of tripling ethanol production in the coming years, it will need ever greater numbers of scientists and engineers.

Brazil now has the greatest number of workers in ethanol:

- Brazil: 500,000
- United States: 312,000
- China: 266,000
-- Germany: 95,000
-- Spain: 10,000

But too few workers in the recycling of refuse:
-- China: 10,000,000
-- U.S. & Europe: 3,500,000
-- Brazil: 500,000.

Likewise, Brazil is far behind other countries in the percentage of its young people involved in higher education studies:
-- Brazil: 12% (5 million)
-- Chile: 30%
-- Argentina: 30%
-- United Kingdom: 40%
-- United States: 50%
-- Canada: 60%
-- South Korea: 85%

...considering the time it takes to build new campuses and train new faculty, distance learning is probably the principal solution to this problem of a shortage of skilled workers.

II. The Contributions of Distance Learning to Capacity-Building

Distance Education is at the center of the new approach to learning. As Arthur M. Harkins has observed, we can now consider that there are four generations of educational paradigms:

- Education 1.0 – Memorization of content
- Education 2.0 – Learning extended through access to the Web
- Education 3.0 – Permits that learners not only consume knowledge but produce it as well
- Education 4.0 – Supports the learner in the production of innovation.

These new strategies for pedagogic and andragogic learning are reinforced by other factors which contribute to the ever-greater importance of distance learning:

- “High Cost of Driving Ignites Online Classes Boom” (New York Times, 11 July 2008). Gasoline goes to US$ 4.00. 80% of 15 million U.S. college students live off campus. Enrollments in online courses has grown between 50 and 114%.
- The State of Michigan, in April, 2006, made it a requirement, to obtain a high school diploma, to have the experience of taking at least one online course (New York Times, 30 July 2006).
- The advent of OERs, Open Educational Resources, seems to promise greater access to knowledge and information throughout the world, and to the re-use and re-purposing of
content; but it is difficult to predict at the present moment how this movement will truly fare.

There was good news in Brazil earlier this year when the results of the Ministry of Education’s 2007 national-level exams testing the knowledge of first-year and graduating college students, yielded surprising data:
-- the students who studied through distance learning had better performances than those who studied in conventional classrooms;
-- among first year students: in 9 out of 13 academic areas tested, distance learners fared better than those who studied in conventional classrooms;
-- among graduating students: in 7 out of 13 academic areas, distance learners fared better than those who studied in conventional classrooms.

We must not forget that the different regions of Brazil have different socio-economic realities, and differing educational opportunities. There is a total of 2,300 institutions of higher education in the country. Three hundred are designated universities because they meet the requirement of instruction, research, and extension activities. The remainder are “university centers” or “faculties,” in which instruction is the only activity. Twenty percent of the total of institutions are public (tuition-free); eighty percent are private (10% following religious orientation; 90% are for profit).

The types of delivery systems used are:
- Correspondence: 71.1%
- E-learning: 62.9%
- Television: 23.6%
- Video: 45.0%
- Satellite: 11.4%
- CD: 49.3%
- DVD: 37.1%
- Radio: 7.9%
- Teleconference: 12.9%
- Videoconference: 24.3%
- Cell phone: 12.9%
- Others: 10.7%

Largest subject areas studied in DL:
- Administration
- Pedagogy
- Language and Literature
There is strict regulation of distance learning activities in Brazil with regard to formal education (when a course leads to a diploma):

- The Ministry of Education – regulates higher education;
- State Governments – regulate secondary education and some post-secondary technological education;
- Municipal Governments regulate primary education.

ABED’s Statistical Yearbook of 2008 showed that in 2007 207 institutions were authorized by the Ministry of Education for distance learning activities and that there were 972,000 post-secondary students enrolled in distance learning courses throughout the country.

III. The Obstacles to the Proper Development of Distance Learning

Perhaps the principal obstacle to the growth and continued improvement of distance learning in Brazil is the highly conservative posture of the Ministry of Education in the process of authorizing institutions to initiate activities. The Ministry is concerned with the quality of courses, especially those offered by private institutions, and there is some reason for this posture. At best we can attribute it to what can be called the “Greed Factor” – or diploma mills and other shady business tactics. At the ICDE 22nd World Conference in 2006, in Rio de Janeiro, Prof. Henrik Hansson, of the University of Stockholm, gave a most interesting plenary address: “Traps, Tricks and Survival Tactics – the Digital Learning Landscape,” in which he talked about “false universities” and “false diplomas.” He estimated that there were some 1,000 such institutions around the world. Although I am pleased to say that no evidence has yet appeared in Brazil of false universities, there are other “crimes,” both of academic quality and those related to consumer issues, which are present and which represent serious obstacles.

For example, among the tricks for maximizing profits at the student’s expense, practiced by some Brazilian distance learning institutions, we sometimes find:

- abridged versions of textbooks (150pp. > 50 pp.)
- printed material, sent to students for study, is lifted out of a manual for using a calculator
- tutors who are not subject specialists
- radically asymmetric tutor-student ratio (1:500)
- not enough computers (or other equipment or books) at student support centers (sometimes called “pseudo-centers”)
- “interdisciplinary exams” (the same test of 40 questions is given to students from five different courses)

As a Brazilian wit once observed: “The Brazilian is always fighting for the right to not obey the law.” In the first semester of this year, there was reportedly a
billboard on a main boulevard in Belo Horizonte, a large Brazilian city, aggressively advertising a distance learning institution with the following appeal to the pocketbook: “What is more important to you – quality or price?”

As a result of this environment, we are subject to excessive government regulations. Although the country’s Constitution (1988) gives universities autonomy in their academic and administrative practices, in the period 1995-2002 regulations were issued which made it practically impossible for universities to obtain permission to initiate distance learning activities. Even worse, institutions both public and private were prohibited from accepting the credits and diplomas of students who had earned their degrees in other countries through distance education. With a change in government in 2002, new laws began to be issued which were less rigid and less confining. Nevertheless there remain legal and procedural obstacles which militate against innovation and creativity in distance learning, and which absolutely ignore institutional autonomy. For example:

• only 20% of a course can be at a distance;
• centers for student support (which must be within 100 km of student residence);
• 10 computers and a physical library of books are required at student support centers, even when the course is very expensive and all students participating have computers at home;
• final examinations in a course must be face-to-face;
• excessive delay for obtaining approval from the Ministry (sometimes in excess of 24 months);
• Ministry evaluators (4,000 educators make up the eligible cohort) sometimes know little or nothing of distance learning;
• Brazil was the last country with a population of over 100 million to establish an “open university” (2006);
• Brazil’s Open University is a consortium of conventional federal universities (and hence does not offer its own degrees), and requires passing an exam to enter (and so is not truly “open.”

There are still other obstacles to the arrival of the “learning city” in Brazil, among them the question of who will finance free access to wireless broadband, a phenomenon taking place in some other nations? For example, I live in São Paulo, one of the largest cities in the world. Twelve million people live in São Paulo’s central area, and 20 million people in the greater metropolitan area. A candidate in the current race for mayor has promised that, if elected, she will cover the central area with wireless services (Wi-fi, WiMAX and WiMesh). But her opponents have estimated the costs of such a measure to be over US$ 2 billion to install (without user terminals), and operating costs to reach one third of the population to be US$ 10.00 per month per user, or US$ 440 million per year, clearly a difficult expense at
the present moment. A more viable approach for the learning city, in Brazil, would be to concentrate investments for access in telecenters (free-access terminals in public places, of which there are already several hundred in the metropolitan area), schools, libraries, hospitals and government offices, and essentially oriented towards community services such as e-government, tele-learning, tele-medicine, and tele-commuting.

IV. Leapfrogging – A Solution?

As we have seen, there are many obstacles to be overcome in order to be able to use distance learning to help construct learning cities. And there is no recipe or prescription that can guarantee results. Perhaps the best advice is to think of the children’s game “leapfrogging,” in which the players jump over the shoulders of one another. As John W. Moravec and Arthur M. Hawkins have observed, leapfrogging is a form of “jumping over the obstacles to achieve a goal,” or “to get ahead of the competition or the present state of the art through innovative, time-and-cost-saving means.” For example, with the current structure of the distance learning professional community around the world, it takes too long for an innovation, or a “best practice” in distance learning to be shared around the world. There is a clear and urgent need for greater and more rapid communication among distance learning specialists. A three-tiered system of communication (global, regional and local), each tier made up of the institutions and professionals working in the area, would guarantee awareness of new problems affecting the practice of distance learning, and the solutions being found. It would make for a single, vibrant community of practice. The only elements lacking are more national associations and a regular flow of information among all participants.
There are a number of other measures which could be taken to improve and accelerate communication with the professional community.

-- There are some 10-15 scholarly periodicals around the world concerned with distance learning. They are practically unknown in developing countries, principally for reasons of cost. If there were a freely-available online cataloging of the contents of all of these journals, it would promote an increased flow of information and knowledge.

-- There is a need for national, regional and global cataloging of available distance learning courses, both those officially recognized by governments or other bodies, and those which are of an informal nature. This would facilitate student recruiting on a global scale.

-- In developing countries there still exists, in many quarters, rejection of distance learning. Hence, it would be valuable, to increase the credibility of distance learning, to have readily available, specially-collected research papers, especially of a quantitative or experimental nature, to be used to counteract measures against distance education.

There is much to be accomplished in the coming years, but the benefits to be gained, both by individuals and society in general, more than justify the efforts.

( The Author: Fredric M. Litto, Brazilian Association of Distance Education )

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[6] For a historical account of the background of Brazilian legislation regarding education, and particularly distance education, see Fredric M. Litto, “Public Policy and Distance Learning in Brazil,” in Terry Evans, Margaret Haughey, and David Murphy, eds. International Handbook of Distance Education, Bingley, U.K.: Emerald Publications, 2008.
A  Probe into Reform and Development of DOE in China

YAN Jichang

【Abstract】The progress that China has made in popularization of higher education has laid a good foundation for the development of continuous education. The rapid popularization of the Internet has provided a better environment for the development of IT-based DOE. After nearly 10 years of experimental work, DOE in China has made remarkable achievements, and has been defined the training model of application-oriented talents while exploring in practice. With its unique advantages and accurate positioning, DOE will contribute to learning- communities and learning-groups when the life-long education and learning-society become goals of the development of China's education. DOE will also become China’s main form of education in the leaning society.

【Key words】DOE   Reform   development

Information technology (IT) has become the primary productive force in China’s current stage of the economic construction. The contribution of the rapid development of information industry to the national economy and its leading role of other industries show the key role of China’s strategic deployment of “Using information technology to stimulate industrialization” in the process of the all-round construction of well-off society. As an important outcome of the development of IT, the Internet has greatly changed the way of life of human beings. Accompanied by the rise and development of the Internet, DOE has not only improved the learning means of traditional education, but also developed into an important form of continuous education, and it will also play an important role in constructing the systems of learning society and life-long learning.

I. The Base of the Development of DOE

1. Rapid Development of China's Higher Education

China’s higher education consists of a regular higher education system and an adult higher education system. Although there exists a big difference between the two in terms of student enrollment and diplomas, adult higher education as an important part of China's higher education, added more opportunities for social members to access post-secondary education and served much more extensively for social and economic development in the last century. Since 1998, China’s higher education has made great progress after several years of continuous expansion. In 1998, college enrollment was 1.084 million, while it has grown up to 5.659 million till 2007, five times of the 1998 figure. Meanwhile, there is no age limit for enrollment any longer. Chart 1 shows the trend of college enrollment in regular and adult higher education:
The popularization of general higher education has made the gross enrollment rate of higher education from 9.8% in 1998 increase rapidly to 23% in 2007, and the rapid growth continues. Judging from the demographic change of the 18-year-old in China, the gross enrollment rate of higher education may reach 39% by 2016 if the number of higher education enrollment keeps 5.461 million in 2006 unchanged every year. Chart 2 demonstrates the original judgment of the development trend of regular higher education gross enrollment rate according to China's 18-year-old demographic changes:


Data sources: The Population of China in 2000 by Age and Gender, China Population Development and Research Center
The growth of higher education gross enrollment rate in developed regions and cities was significantly higher than the national average. Take the year 2007 for example, the higher education gross enrollment rate of Jiangsu Province was 37%, Zhejiang 38%, Shanghai 65%, Tianjin and Nanjing 55%. In 2006, the higher education gross enrollment rate of the major cities such as Guangzhou, Shanghai, Beijing, Tianjin, and Nanjing was over 50%. Because of China’s family planning policy, the age structure of the population has taken significant changes. The population of 18-year-old in 2008 in China is 26.21 million; by 2015 it will decrease to 14.45 million. Given such a circumstance, people's desire and demand for quality higher education is highlighted unprecedentedly. Only take Beijing for example. In 2006, there were 20,000 students who failed to enter their ideal universities decided to study for an additional year in high school to better prepare for college entrance exams, a 25% increase compared with the previous year. High gross enrollment rate of higher education in cities and the stronger awareness of pursuing high-quality college education resources unveiled a new picture for the overall development of China’s higher education.

With the rapid development of regular higher education, the supplemental function of adult higher education has been reduced significantly. The number of students in adult higher education increases relatively slowly, and the number of adult education colleges is also rapidly decreasing. In 1998, there were 962 Adult Education Colleges in China, while in 2007 there were only 413, the number curtailed more than 50%. In the same year, the number of regular colleges and universities reached 1908.1 The entrance examination of adult higher education is gradually losing its significance of student selection. The admission score standard of adult college entrance examination across the country keeps lowering down. Take “Gaoqizhuan” (College Diploma Program Entrance Exams for High School Students) for example, in 2006 the admission standard was less than 120 points (total score 600 points) in more than half of the provinces (municipalities) in China. In the same year, the admission standard of some school was only 100 points (total score 450 points) in the “Zhuanshenben” test (University Bachelor’s Degree Program Entrance Exam for College Diploma Holders).2 As an extreme case in a few areas, the adult higher education entrance exam-sitters were far less than the total number of enrollment targets. Despite that the scale of adult higher education has the tendency to shrink; the number of prospective college students is still very large in a short period of time. By analyzing the 15-year-old population, the net

1 Data sources: The statistical bulletin of the development of National education in 2007
2 Data sources: The summarized admission information of National Adult College Entrance Examination
enrollment rate of senior high school and 18-year-old population, higher education gross enrollment rate, we can see that the number of potential adult higher education students is still considerable as indicated in Table 1. Take the year of 2007 for example, there were 12,092,300 high school graduates. Given that 5,782,200 graduates obtained access to regular higher education, the number of prospective adult higher education students might be 6,310,100.

Table 1 the Analysis Table of the Potential Adult Higher Education students in China

<table>
<thead>
<tr>
<th>Year</th>
<th>the Population of 15-year-old Unit: million</th>
<th>the Gross Enrollment Rate of Senior High School</th>
<th>High School Graduates Unit:10000</th>
<th>the Population of 18-year-old Unit: million</th>
<th>the Gross Enrollment Rate of Higher Education</th>
<th>the Number of People Accepting Higher Education Unit:10000</th>
<th>the Potential Number of Adult Higher Education Unit:10000</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>20.43</td>
<td>42.8%</td>
<td>937.86</td>
<td>23.10</td>
<td>12.5%</td>
<td>288.75</td>
<td>649.11</td>
</tr>
<tr>
<td>2001</td>
<td>23.19</td>
<td>42.8%</td>
<td>816.44</td>
<td>20.06</td>
<td>13.3%</td>
<td>266.80</td>
<td>549.64</td>
</tr>
<tr>
<td>2002</td>
<td>25.28</td>
<td>42.8%</td>
<td>832.71</td>
<td>20.31</td>
<td>15.0%</td>
<td>304.65</td>
<td>528.06</td>
</tr>
<tr>
<td>2003</td>
<td>24.58</td>
<td>43.8%</td>
<td>874.40</td>
<td>20.43</td>
<td>17.0%</td>
<td>347.31</td>
<td>527.09</td>
</tr>
<tr>
<td>2004</td>
<td>25.14</td>
<td>48.1%</td>
<td>992.53</td>
<td>23.19</td>
<td>19.0%</td>
<td>440.61</td>
<td>551.92</td>
</tr>
<tr>
<td>2005</td>
<td>26.21</td>
<td>52.7%</td>
<td>1081.98</td>
<td>25.28</td>
<td>21.0%</td>
<td>530.88</td>
<td>551.10</td>
</tr>
<tr>
<td>2006</td>
<td>20.08</td>
<td>59.8%</td>
<td>1076.60</td>
<td>24.58</td>
<td>22.0%</td>
<td>540.76</td>
<td>535.84</td>
</tr>
<tr>
<td>2007</td>
<td>18.75</td>
<td>66.0%</td>
<td>1209.23</td>
<td>25.14</td>
<td>23.0%</td>
<td>578.22</td>
<td>631.01</td>
</tr>
</tbody>
</table>

Note: Senior middle school education (including High school, Vocational High School, General Secondary Specialized School, Technical School, Adult High School, Adult Secondary Specialized School)
Data sources: China Education Yearbook 2004, the statistics of education development—all levels of education gross enrollment rate
<http://www.edu.cn/list1_544/20060323/t20060323_157415.shtml>
Data sources: the population of China in 2000 by age and gender, China Population Development and Research Center
<http://www.chinapop.gov.cn/wxzl/rkgk/200806/t20080629_157000.htm>

2. The Rapid Development of China's Internet

The latest report of China’s Internet development shows that the number of Chinese netizens has reached 253 million by the end of June in 2008, making the scale of the netizens the biggest in the world. China’s netizens has continued to increase rapidly. The 2008 witnessed an 91 million increase and 56.2% growth compared with the same period in 2007. Now more and more
people realize the convenience of the Internet. With the decline of Internet charges and the improvement of people’s income standards, the Internet is gradually becoming affordable and accessible to tens of thousands of households. 28.9% of Chinese netizens once used mobile phones to surf the Internet in the first half of 2008, and the number of mobile netizens has reached 73.05 million. Using mobile phones to surf the Internet has become an important development trend of the Mobile Internet access. The primary constituents of China’s netizens are young age group of 30-year-old and below, which accounts for 68.6 percent of Chinese netizens, or more than two thirds of the total population of netizens. In terms of internet users’ education background, the popularization of the Internet made it accessible to low-end diploma population. With the gradual expansion of the scale of the netizens, the netizens’ education structure is gradually approaching to the average of China’s total population, a manifestation of Internet popularization.

At present, the number of home computers with internet access totals 84.7 million; in the first half of 2008 alone there was an increase of 6.7 million, with a growth rate of 8.6 percent for the six months. The proportion of netizens' using the Internet at home is continuing to rise, from 67.3% in December 2007 to the current 74.1%. The conditions of accessing the Internet has been improved, and meanwhile netizens use the Internet for an average of 19 hours per week. In the aspect of basic resources of the Internet, the domain names have reached 14.85 million, with the annual growth rate reaching 61.8%., and the annual growth rate of the IPv4 addresses is 33.7%; In the aspect of basic information resources, the number of websites is approximately 1,919,000, with the annual growth rate reaching 46.3%. The increase of the number of the website shows that China's Internet information resource is becoming more abundant.3

3. Higher education and the development of the Internet has laid a solid foundation for the development of DOE

The increase of the gross enrollment rate of higher education, especially the faster increase of the gross enrollment rate in cities, has laid a good foundation for the development of continuous education and the non-diploma educational training. The education development paths in developed countries demonstrate that higher education will be developed if continuing education is developed, and people will not only show emphasis on diploma education. In the less developed stage of higher Education, China's higher education mainly focuses on the diploma education, and “Diploma fever” has always been a social pursuit of the “Golden Cake” (a highly valued hot-pursuit). After higher education enters the phase of massification, non-diploma education focusing on learners’ ability and competency enhancement is bound to become a

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3 Data sources: the Statistics Report of the Situation of the Internet Development(July, 2008), China Internet Network Information Center(CNNIC)
http://www.cnnic.net.cn/index/0E/00/11/index.htm
development trend, though adult diploma-education will still take the dominant position for a certain period of time. Since China has officially proclaimed the goal of building a learning society, life-long education system will be the backbone of a learning society, continuous education will become the main part of life-long education, and non-diploma education training will serve as the major form of continuous education. DOE has made contributions to the popularization of higher education, and will play a greater role in continuing education and particularly for non-diploma professional training.

According to a survey of netizens, it is believed that the Internet’s first important role is to enrich netizens’ recreational life (68.6%), and the second is to benefit netizens’ work or study (68.1%). The majority of netizens have been used to their netizenship, and “feel that they can not live without the Internet”.4 The reasonable development of netizens’ demographic structure in China as well as the improvement of the infrastructure has provided an extensive social basis and resources guarantee for the development of modern distance education and continuing education.

II. China advocates the development of DOE

Modern distance education is a new type of education form which came into being with the development of modern information technology, and it is the main measurement of constructing the life-long learning system in the era of knowledge economy. Implementing the “Modern Distance Education Project” by making full use of the modern information technology on the basis of the original distance education can effectively bring the advantage of all kinds of existing educational resources into full play. It accords with the trend of the development of world’s science and technology education, and it is also the strategic measure of developing education under the circumstance of the shortage of educational resources in China.

1. China launched the “Modern Distance Education Project”

In 1998, the State Council of China promulgated the Scheme of Education Rejuvenation Initiatives for the 21st Century, proposing “Carry out Modern Distance Education Project to build an open education network and set up a life-long learning system. …Establish and perfect the system of the continuing education to meet the needs of life-long learning and knowledge update. Qualified colleges and universities should be able to offer courses of continuing education and build continuing education centers. Establish high-quality network courses by relying on the network of modern distance education and organize the first-class teachers to give lectures so as to make educational resources shared across time and space and provide a wide range of continuing education courses for managers and professionals from different walks of life.

In 1999, Chinese Ministry of Education officially launched the “Modern Distance Education Project”.

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4 Data sources: the same as above
Distance Education Project”. From March of 1999 to date, the MOE has approved 69 universities, including 68 general universities and a Radio and TV University, to carry out pilot projects in modern distance education. In 1999, Tsinghua University, Zhejiang University, the Central Radio and TV University were recognized as the first batch of pilot universities. In 2000, the Ministry of Education has approved 26 pilot universities such as Beijing University, Beijing Normal University and so on. In 2001, 14 other pilot universities including Xiamen University and Harbin Institute of Technology were approved, and in 2002, 22 more pilot universities like Dalian University of Technology and Southwest University of Finance and Economics were approved. These pilot universities which are mainly oriented to in-service personnel have made a positive exploration and the accumulation of the initiation and development of China’s Modern Distance Education.

2. The Current Situation of the development of China's Modern Distance Education

Up to 2007, the pilot colleges has recruited a total of 6.7 million students, of which 3.2 million have graduated and 3.55 million are still in school, and among them in-service personnel accounted for 86.51% of all the students recruited. In the year of 2007, the total number of the students recruited was 1.35 million, of which the number of students recruited by colleges and universities accounted for 40%. China’s Modern Distance Education focus mainly on diploma education and most of them are “Zhuanshengben”, accounting for about 40%, and then “Gaogqizhuan” (about 25%) and “Gaoshengben”(University Bachelor’s Degree Program Entrance Exams for high school graduates)(about 19%). By the end of 2006, the pilot colleges and universities have offered about 1560 majors in 299 categories, covering 10 disciplines such as management, economics, pedagogy, literature, law, engineering, science, agriculture, medicine and philosophy. Furthermore, the pilot colleges and universities has established some new majors like e-commerce according to need of the socio-economic development. In 2006, the pilot colleges and universities developed non-diploma education training for 3.45 million person times from more than 20 different sectors and industries.

The pilot colleges and universities have set up off-campus learning centers across the country. By the end of 2007, there have been about 9,000 out-of-school learning centers, of which there are 3292 teaching sites of TV universities and 4583 off-campus learning centers of regular universities. The off-campus learning centers of regular universities mainly include centers set up by the local educational institutions which were commissioned by pilot colleges and universities and centers belonging to the public service system of modern distance education. There have been 560 off-campus centers in western China, accounting for 16% of all the off-campus centers, and they will provide rich educational resources for the local needs. By the end of 2005, the
pilot colleges and universities have established 18,000 learning resources, the main form of which is network courseware (totalling 10025, accounting for 67%), and there are other learning resources including special lectures, test questions database, database of answers and solutions, medium material database, teaching case database and so on.

Over the past 10 years, the pilot work has made great progress in China’s Modern Distance Education. It also contributed to the improvement of the gross enrollment rate of higher education and has promoted the popularization process of higher education. Through the application and promotion of information technology, China’s informational education has been promoted; The new teaching model which mainly focus on open education has promoted China’s higher education reform; the opportunities and convenience provided for the full-time learning of in-service personnel have facilitated all people learning and the establishment of learning society. Meanwhile, there are some problems and challenges in the development of Modern Distance Education, which lie in the following areas: 1) Diploma education and non-diploma training haven’t achieved a balanced development, which still can not meet the needs of learning society. The popularization process of regular higher education reduced the task of adult compensatory education. Life-long education system needs various kinds of education and training which oriented to changing people’s concept and enhancing their capacity. 2) “Standardize the management, strengthen services and improve the quality” has always been the fundamental of the survival and development of distance Education, which can not be shaken. Pilot colleges and universities enjoy the right of autonomy in running schools such as independent proposition, organizing examinations to enroll students, determining the scale of enrollment, the fixed number of years of education and the period of validity of credits and so on, has put forward stricter requirements to ensure the quality of modern distance education of the pilot colleges and universities. 3) To support the education of poverty-stricken areas and areas inhabited by ethnic minority groups is an important task of distance education of the pilot colleges and universities. It is better to deliver the high-quality educational resources to the western region so as to make up for the imbalance between eastern and western education by the means of Modern Distance Education than any other education form.

3. The National Development Programming of Distance Education

As a programmatic document of the Party, the Report to the Seventeenth National People’s Congress described education, health care, housing, pension, employment and improving people's livelihood as a key. In the chapter of “Give priority to education and turn China into a country rich in human resources”, it says “Distance education and continuous education will be promoted to make ours a society in which every citizen is committed to learning and pursues lifelong learning.” This is not only a clear goal, but also
the guidance for China’s modern distance education. From the analysis of the development trend of China’s education, we have already seen great changes occurred in adult higher education and continuous education. It requires precise positioning to promote the reform and innovation of modern distance education and ensure the sustainable development of Modern Distance Education. Addressing people’s demand for flexible forms of higher education and integrate various forms of adult education with the network technology as the main means to contribute to building learning society together.

III. A Learning Society needs DOE

The concept of learning society is from the book “Learning Society”, published in 1968, written by Professor R. M.Hutchins, a famous American educator, former president of the University of Chicago. From then on, the international community has been carrying out the extensive research on learning society, learning group, life-long learning, and learning to learn, and so on. Learning society is a kind of social form with an ideal and convenient social learning environment and in this society it is the basic rights, fundamental task and basic requirements to learn for individuals, families, organizations, communities and governments. Learning will be a basic approach of raising the quality of life and being successful.

1. Learning Group and Learning Community

In December, 2003, In the national conference on human resources Hu Jintao proposed, “China shall further promote the concept of lifelong learning in the whole society, encourage people to participate in lifelong learning through various means and channels, further reform and develop adult education, strengthen the work of training various types of talents and continuous education, improve the training network oriented to wide coverage and multiple levels, promote to build the learning group and learning community actively, and build life-long education system with Chinese characteristics”. Life-long education is a kind of education philosophy and education mode which is entirely different from the traditional education, and it has smashed the restrictions of school education extending education to the whole of human life and social organizations, and it will provide learning opportunities for every member of society when necessary. In the society of this kind, every citizen is no longer playing a passive role in knowledge acquisition but playing an active role in a self-motivated manner. People are able to have a broad and equal access to education.

On how to build a learning society, many scholars in China have made some very good suggestions. We comparatively agree on the view that “Bring the entire education system into the life-long education system”. 5A learning

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society should “break the boundaries of education, and attention should be paid to informal, non-diploma education.” In the process of building a learning society, learning group and learning community are the most important forms. Developing community education and establishing learning community reflect the common requirements of China's educational development and community development, and they are important links of building life-long education system. Community education has the characteristic that the age distribution is wide, occupations are quite various, and the learning needs diverse. The construction of learning society needs to “improve the quality of the members of the community as the starting point, and make the curriculums diversified and of multi-levels as far as possible in order to meet the educational needs of each member of the community and adapt to each individual's characteristics, habits, hobbies.”

Basicall, people are learning demands in a community are diverse and their continuing education is funded by the government and paid by themselves. In comparison, people's education demands within an organization are similar in terms of professional development and, a considerable number of them have received university education, thus they share comparatively similar education background as a group, and their continuing education is funded by their employers and themselves. Learning Organization brings training and continuing education for its members into the development of the organization and management. It promotes innovation through learning and pushes development ahead through innovation. We believe that the frontline of university continuing education should target learning groups, and colleges and universities shall play better roles in the establishment of learning groups. To promote the quality and capacity of working professionals is the main task of learning society, while to improve the quality of humanities, science and technology and professional ability of laborers is the main task of university continuing education.

2. DOE is Fit for the Training of Application-oriented Talents

Building a learning society needs the participation of all people, including the participation of more working professionals. It is widely hoped that this kind of study doesn’t need to study in full-time, but at the same time they can have more access to education, have an orderly, normative and fair environment for education and have teachers to teach them without discriminate… DOE, which has the characteristics of no limit of time and space, admitting leniently while graduating rigorously, stereoscopic education system and getting learning resources with network, is an effective way of building a learning society.

In the Internet environment, Students and teachers, learning groups are in the state of long-term quasi-separation, which provides students with a broader,
more flexible learning space with no limit of time and space. Schools have an impact on student learning through the planning and preparation of learning materials, provision of learning support services. Students don’t learn knowledge mainly directly from teachers, but from well-designed interactive learning materials by teachers. The core value of DOE is its convenience for the people in-service who can get high quality education and improve their skills and abilities without leaving their jobs. The style opening and the credit system is conducive to the establishment of the stereo education system with more entrances and more exits, so that anyone at different stages of life can get the opportunities of learning and getting education according to the different needs by different ways and means. The school-running orientation of admitting leniently while graduating rigorously and of large quantities and wide area provides equal access to lower prices and better quality education for the people, especially vulnerable groups and people in poor and remote areas. Therefore, the network education is suitable for people who want to study on their own and have the ability of self-learning and strong self-control, it is also suitable for continuing education of employees after they finish higher education, and it is suitable for the mass education and application-oriented training.

The orientation of the application-oriented training of DOE is in line with the needs of the learning community. According to the characteristics of DOE, students’ characteristics and the national requirements of training for different diploma education, DOE is suitable for the training of application-oriented talents who can adapt themselves to social change and the needs of jobs and have certain information literacy and self-learning ability. It also shows emphasis on quality-improvement, capacity-building and practice training in order to meet the needs of society. DOE is suitable to the develop the potential ability of on-the-job employees, make good effort to foster innovation and creativity and fully exploit the advantage of each student, so that students of employees on-the-job who have much contradiction between work and study can experience the joy of success in study, and go to the road of talent forming and success by making best use of the advantages. DOE is also suitable for industrial-school and it should implement the examination of ability and focus more on people’s potential.

Information technology has been innovated and developed swiftly and has an extensive impact on our society. As information technology continues to make breakthroughs, the internet is poised to leading profound transformation to production and people’s way of living. The idea of life-long education and learning society has become the guiding principles of promoting and implementing educational reform and development in many countries and regions, and has also become an important goal in the pursuit of social development and progress and a wide range of socialized educational practice. DOE is the major education form of a life-long education system and a learning
society. As a perfect combination of education and information technology, DOE will make greater contribution to human beings’ knowledge exploration and make a bigger difference to the world.

( The Author: YAN Jichang, secretary-general of the National Modern Distance Education Coordination Organization of Chinese Colleges and Universities, professor of Tsinghua University )
Distance Education as a Key Factor in Building Literacy in India

Swati Mujumdar

Introduction

I must at the outset express my most sincere and grateful thanks to the ICDE and its co-organizers for inviting me to deliver this address. Though I feel greatly honoured to be so invited, I must also confess to a sense of awkwardness, especially speaking before such stalwarts in the field of open & distance learning present in this gathering today. I am perhaps the newest member of the ICDE, and am attending this international meet for the first time, though, of course, I look forward to many such occasions in the years to come. I have chosen to speak today on Distance Education as a key factor for building literacy in India. I will also touch base upon the use of ICT as an important factor in this system as I am a great advocate of the use of modern technology in distance education and am convinced that in the next two decades or so the pattern of education will undergo a revolution because of increasing use of technology, and also new innovations in this field. Though my thoughts are based on Indian conditions, they may be relevant, to most of the other developing countries too especially from the South East Asian region.

Shortly we shall complete the first decade of the 21st century. Tremendous economic, scientific and technological development has taken place in the last 200 years all over the world; nevertheless a large mass of humanity still lives a poverty-stricken life. Ignorance, malnutrition and disease have severely affected human endeavor. Global warming is no longer a myth and is staring darkly at mankind. Unless some drastic and imaginative steps are taken by the right thinking people all over the world, the problem of poverty, socio-economic divide and deprivation will continue to plague us throughout the new century. It may create a set of new socio-economic problems which may further accentuate poverty and deprivation. In this address I have chosen to examine the role of distance education in building literacy as well as its role in the economic development of India, mainly because of the availability of the relevant data.

India is an important country in South Asia. It comprises 28 states and 7 Union territories and has a federal political structure. It is one of the less developed countries of the world, with the per capita GNP of only US $ 740. Its population is estimated at 1.12 billion which is more than 17 percent of the world population, though it accounts for only 2.4 percent of the world’s surface area. Thus, a highly adverse land: man ratio is a special characteristic of this country. India will also become within the next 20 years a country with the youngest population.
Literacy, education and human resource development

The discussion so far would bring home two important economic characteristics: first, the country is economically very poor; second, the country is plagued with illiteracy and the quality of the labour-force is far below the standards of the developed countries. The labour not only lacks in the skills necessary for the available jobs but, being illiterate, also the capacity to acquire new knowledge for better jobs.

UNESCO defines an illiterate person as one who cannot, with understanding, both read and write a short, simple statement on their everyday life. Indian was ranked 147th out of 177 countries measured for literacy by UNESCO.

I am now quoting some data from a recent article by Subodh Varma in the Times of India mentioning some shocking yet realistic facts and figures related to the education scenario in India - In 1961, only about 28% Indians were literate while in 2006 the estimates put literacy at about 66%. This is truly an appreciable jump in literacy rates; however over 380 million still remain illiterate. That is the largest number of illiterates in any country. The total number of children in the age group of 6 to 24 years is about 460 million. Only about 63% of them are actually studying. Over 170 million or about 37% potential students have been left out of the opportunities of education. Experts and policy makers offer many reasons why so many have been left behind by the country’s education system. Although poverty is one of the major reasons why youth and children quit studying to start working there are four great divides which pervade every aspect of life including education in India – they are – the gender divide, the rural-urban divide, the rich-poor divide and still prevalent caste divide. In each case there is a disadvantaged section, which finds it difficult to have access to educational and employment opportunities and thus gets left out. Thus one finds lower literacy rates, higher drop out rates and lower enrollment ratios amongst agricultural labourers, tribal women, scheduled castes and such under-privileged.

The 11th Plan is termed as “India’s Educational Plan.” It places highest importance on education as a centered instrument of achieving rapid inclusive growth. Education and skill development are at the core of our government’s Plan. The Indian Government’s 11th Five Year Plan for the country has a significant emphasis on both education and ICT. Today there are 378 Universities, 18064 colleges, 4.92 lakh teachers and almost 140 lakh student enrollments in higher education, making the Indian higher education system as one of the largest in the world. There are 23 Central Universities, 216 State Universities, 110 Deemed Universities, 11 private Universities and 38 institutions of national & state importance in India. The Government plans to setup 30 new central universities, and several additional colleges in order to achieve the gross enrollment ratio in higher education from the present 11% to 21% by 2015. The government has pledged to raise public spending on education from the present 3.6% to 6% of GDP. Education has a 19.4% share in the total plan outlay - by far
The largest and much more than earlier years. The plan focuses on raising the literacy from present 66% (in 2006) to 80% in a ten year span. These targets seem difficult if not impossible.

The Indian government’s plan also highlights on “inclusive growth”. As I mentioned earlier many sections of our society have been left out of growth that India has achieved in recent times. The rates of poverty and illiteracy are higher among the under-privileged and backward sections of our society as compared to the affluent sections. Women, backward class, rural, minority and tribal groups are some of those which have not received participation in the growth of our country and as a result have not received all those opportunities that have benefited the larger sections of our society. The literacy rates amongst these classes are even lower than their urban counterparts. The 11th Five Year plan has laid out guidelines and policies to focus on this inclusive growth which will enable participation of all sections of our society, in the growth process, irrespective of class, creed, gender, race and geographic location.

**Distance education , What it is and why**

In general, distance education can be defined as the system of teaching by someone who is removed in space and time from the learner. Use of different types of media besides the print is an essential part of distance education. Though the teacher and the learner are separated, and the learner is often an individual who learns in his own place and at his own pace, the distance education system also envisages some sort of a two-way communication. Fortunately tremendous advancements in science & technology including the satellite based communication technology, have now made this possible. Student support services through electronic networking have been adopted by many institutions.

Fair and equitable access to education has been the main objective of the education system in most of the civilized countries. However, in large countries like India whose geographical conditions are such that small human habitations are dispersed far away from each other, equity in access to education has posed serious problems in extending the traditional systems of education. It is not only the physical infrastructural facilities but also the human resource in the form of teachers, which have posed a serious constraint. The potential of distance education to promote universal access to education and build literacy has been realized now and governments across the globe are looking at it more seriously. The system is also capable of providing a second chance of education to those who are eager for it. It is also capable of providing orientation and refresher courses to those already gainfully employed and also those who wish to acquire knowledge in fields other than their own. Thus distance education can provide education at various levels i.e. to the illiterates, the semi-literate, the skilled and technical workers and even those who are already well-educated and employed but wish to venture in newer fields.
Distance education – literacy and economic development

The two major reasons for illiteracy in India are the dramatic growth in population vis-à-vis the number of available schools and the tendency of families to take their children out from school early to serve as breadwinners. In case of the girl-child, the families often take them out from school to serve as a helping hand at home or on the farm.

Although India has one of the largest primary education systems with 150 million children enrolled, 37% drop out before the 5th grade.

There is no single effective solution to this problem. However, some of the possible solutions could be:

1. Increasing the number of schools at a much faster rate
2. Getting good trained teachers
3. Adopting to ODL system for mass education

Increasing the number of schools so as to match the rate of population growth is an extremely difficult if not impossible solution (it would mean opening a new school every day for next 10 years). Good teachers are in general a scarce resource, coupled with the problem of teachers training to ensure quality.

The ODL system as a tool for mass education is indeed worth mentioning. Distance education can provide excellent non-formal education to millions of people living in rural areas of the under-developed world; this would involve use of the multi-media system especially the electronic system like audio-video educational facilities. Non-formal distance education can be used not only for imparting basic skills, knowledge and training but also for spreading knowledge of ways and means of raising productivity in rural occupations like agriculture, animal husbandry, forestry and fishery. It can be also be used for promoting important messages about health, population control, hygiene etc. The appropriate use of distance education coupled with efficient systems and technology can indeed bring about major changes and improvement building literacy especially amongst the poor, underprivileged and rural children and youth.

It has been seen that in large countries such as India, one of the major drawbacks in the education system in rural and remote areas is the non-availability of good teachers. Distance education system can also provide training to teachers at a massive level through the use of ICT while at the same time it can reduce the dependency on teachers for achieving learning. In a country such as India, where the teacher is a scarce resource, distance education coupled with innovative ICT solutions can create a model of education delivery and learning where the need for a teacher is reduced, if not eliminated. Online learning via WBT’s, CBT’s, laptops in local languages are classic examples of this type of a model if appropriately woven into the learning and education system.
In the field of formal education, distance education has indeed unlimited scope. Distance education can be used for imparting basic knowledge to those who have missed the primary education system in the conventional way. Distance education has an all absorbing role to play in liberal education, skill oriented education, vocational education, higher education and even scientific and technological education for adults who have not had a chance to learn them formally. Fortunately, most of the developing countries have by now started using distance education mode at the secondary and tertiary levels. Open Schools and Universities have also been set up in these countries. Universities have done a fantastic job of educating millions of children, youth and adults from all strata of our society.

**New Technologies and Distance Education**

The education that developing nations desperately need is one which equalizes the opportunities for the poor and the disadvantaged, acts as a system of mass education and which generates employment opportunities thus raising the livelihoods of millions of people. New technologies can help distribute education from the world’s best sources to all the people irrespective of age, sex, creed, religion, socio-economic status, etc. who are in need of education, thus crossing all geographical and social barriers. New technologies, namely satellite communication, fiber optic cable, computers, internet, wireless and the web have dramatically enhanced educational capabilities. Technology has allowed faster delivery and continuous updating of content in order to enhance quality, reach and application.

Fortunately, the world at large has seen tremendous developments in the field of science and technology, and education technology has not remained far behind. The emergence of the information technology in the field of education has brought about a revolution. This revolution has in a way removed the barriers of classroom learning.

The governments of most developing countries are today fighting to provide this equitable access to ICT for all segments of society. It would be apparent that unless the less developed countries are able to create an appropriate technological infrastructure to support the kind of learning needed in the 21st Century, they would be left far behind. The need of 21st Century will be to exploit the information and technology revolution to the fullest possible extent. Economic development will depend to a large extent on creating and optimally using the technological infrastructure. Countries which would harness the power of multimedia communication for education and training purposes may be the economic powers of the present century.

It has been found that students who often do not perform well in conventional examination systems demonstrate high success levels in the use of IT and IT-enabled learning. IT is now being looked at to provide new directions in pedagogical practices. An amount of Rs. 5000 crores is being provided during
the 11th Five Year Plan of Government of India in order to provide ICT infrastructure in schools. Under this program each school will be provided with at least 10 computers, a server, a printer on LAN and broadband internet connectivity of 2Mbps. Training of teachers in the use of ICT for classroom learning will be an important component of this initiative. A number of steps have been taken for leveraging ICT at the higher education level.

Experimenting with new Technology at SCDL, PUNE

Symbiosis Center For Distance Learning has been offering blended learning programs since 1994. Our programs are extremely popular as they meet the market needs and provide employment and career advancement opportunities to thousands of youth from India and over 42 different countries. Our curricula is constantly upgraded and quality is our prime focus. At the Symbiosis Center For Distance Learning, we realized the importance of ICT in education long back. Since 2004 especially we have focused significantly on implementing technology solutions which will increase access to education, improve quality, provide fast response to student queries and provide better student support services. We are the only educational institute in India to have a “paper-less” office and a dedicated student call center. Each student call including grievances are tracked for call history and carefully monitored for quality of response by trained professionals. We also house a “communication center” which answers student queries sent via email and guarantee a response of 1 business day. Technology has not been used to in its simplest form yet used appropriately and effectively. Rather than spending on costly software, we have focused on implementing cost-effective, simple yet efficient systems which have benefited our students tremendously. We track the complete details of each of our student right from enrollment to graduation thereby ensuring fast and accurate resolution of student issues. Technology has been used effectively in order to achieve this. Today, our students can track their own dispatches on the web site rather than calling the institute; they can submit assignments online and appear for an examination at any time 365 days of the year at their choice of location. Our students can access all the learning facilities such as e-learning, faculty chat sessions, exam booking, academic performance etc through our sophisticated web portal and thus feel a part of a large virtual campus created by appropriate use of ICT. Our institute has thus gained significant reputation and popularity not only for offering high quality education, but also for bringing out innovative student support services with appropriate and effective use of modern technology. This has infact been one of reasons for our exponential growth from a mere 8000 students in 2001 to an overwhelming 200,000 student strength in 2008.

Conclusion
By way of conclusion, I can only say that those of us actively involved in providing distance education to a large number of learners are greatly helped in our mission by the advent of new technology in the field of education per se, and distance education in particular. The new technological devices like the computer, internet and the web have greatly enhanced our reach to the disadvantaged sections of our community; the snag, however, is that many of them have still no access to the technical devices to derive the full benefit of distance learning. I am optimistic that in the coming 5-10 years, technology will penetrate down to the smaller villages and hamlets of our great country, empowering all our people to benefit from the country’s economic growth and enabling us to achieve higher literacy rates while providing education opportunities to all sections of our society irrespective of class, creed, race or gender. Let us all set forth with this optimism and dreams to eradicate illiteracy, poverty and discrimination. Let us today pledge to take education to every nook and corner of this world and bring into its folds all those especially the underprivileged who are desirous of seeking knowledge but have been left behind in this race of economic development and growth.

Before ending, I would like to thank all of you for patiently listening to my address. I would also like to thank the organizers and ICDE for giving me this opportunity to present my thoughts today. Thank You and May God Bless Us All.

(The Author: Swati Mujumdar, Director of Symbiosis Centre for Distance Learning, Pune India)
Thank you very much for your kind and generous introduction. I am indeed delighted to be with you today in Shanghai. I would like to congratulate and thank the conference organizers, planning committee, and sponsors for hosting this global forum.

My comments today will address some of the trends, opportunities and challenges we face in global open and distance learning. As ‘global colleagues,’ can explore these issues together, engage in insightful discussions, and through these dialogues, perhaps, be enlightened about our own views and biases towards global higher education.

Liang Qichao (1919), a unique figure in Chinese history, nearly a century ago inspired us all about the human, social and cultural potential of a global community. From Impressions from my European Journey, he wrote:

‘Our nation has a great responsibility . . . to enrich our culture with Western culture and to enrich Western culture with our culture, so that they may fuse into a new culture.’

We can also enrich our collective understanding of open and distance learning by sharing together as global colleagues.

**Access: The Global Challenge**

A major catalyst for the growth of global higher education has been the complex issue of educational access. It has been estimated that by 2010 there will be 100 million people in the world fully qualified to move from secondary education to tertiary education for which there may be no access. This total is actually now closer to 120 million students. So here’s an interesting question. Indeed, if this forecast is true, then why is global competition for students growing so rapidly?

The answer, in part, is that even if these estimates are remotely accurate, these qualified students do not return to university at the same time or with the same goals. How will we serve these students? Is open and distance learning the solution? We will come back to this question.

**Going Global: The Driving Factors for Universities**

What factors are driving universities into the global higher education marketplace? First, is the underlying premise that a nation’s economic infrastructure in the global marketplace is inherently dependent upon establishing global partners, attracting qualified students and workers with high-need skills, and establishing higher education linkages to world class research, technology transfer, academic programmes, and global business enterprises.

Secondly, many universities are going global to attract alternative sources of revenue to support both domestic and foreign endeavours, including
internationalizing their curriculum to ensure graduates are prepared for living and working in a global society.

Thirdly, the growth of English as the global language for commerce is serving as a catalyst for universities to expand their international linkages and more universities are now offering programmes, particularly at the post-graduate level, in English to attract international students. International student mobility is shifting rapidly and more students are completing part of their education while studying abroad.

**Trends in Global Cross-Border Higher Education**

Today, host nations are becoming more selective for approving and selecting foreign providers to offer programmes in-country. At the same time, we are seeing unique public-private partnership models develop between government, business, and universities that are designed to meet specific needs within the host country. For example, these programmes may be training mid-level public managers, creating professional development for engineers, or offering high level English language training programmes for business personnel.

My main point is that host nations are becoming very selective about the types and levels of programmes offered by foreign providers. As I mentioned earlier, these partner linkages are designed to strengthen internal economic infrastructure, provide high-skills training for the workforce, and enhance the host country's higher education system.

As you may surmise, these issues relate directly to quality assurance issues in cross-border higher education. I would like to mention some essential global resources that are available. First, is the *Guidelines for Quality Provision in Cross-Border Higher Education* (2006) published by UNESCO-OECD.

Second, is a document entitled ‘Sharing Quality Higher Education across Borders: A Statement on Behalf of Higher Education Institutions Worldwide (2004),’ endorsed by more than 30 higher education associations around the world. Third, is ‘Sharing Quality Higher Education across Borders: A Checklist for Good Practice’ (2006). These two latter documents were jointly prepared by four prestigious global organizations: the International Association of Universities (IAU); the Association of Universities and Colleges of Canada (AUCC); the American Council of Education (ACE); and the Council for Higher Education Accreditation (CHEA).

Given we are here Asia, a final related resource is the UNESCO-APQN Toolkit: Regulating the Quality of Cross-Border Education. I encourage you to access the organization websites of these organizations and review these documents.
Emerging Hosts and Sources

This graphic provides you with a general matrix of international cross-border activity. Host countries are those that approve foreign providers to deliver programmes in-country. Source countries are those that deliver their programmes globally to other countries. You will notice that historically the US, UK, and Australia has been the major source countries. Conversely, China, India, Malaysia, Singapore and the Gulf States have been the major host countries over the past five years. This, however, is changing. China, France, Germany, India, Malaysia, South Africa, Russia, and many other countries are becoming emerging source nations and delivering programmes externally.

Global Distance Learning (Ad) Ventures

What are the goals of your distance learning programme and strategy? It is a truism that if you don’t know where you’re going, it won’t matter which path you take. Moreover, if you don’t take the necessary time to plan then you will be embarking on a distance learning adventure rather a sound, well developed open and distance learning venture.

So let me set the context for my subsequent comments. We have seen significant developments in global communications technologies over the past ten years. These have served as the catalysts for the exponential adoption of open and distance learning by universities, faculty, students, and the public for delivering higher education locally, regionally, and nationally. So given all this progress in technology and delivery potential, consider this question.

Why is 75% of global cross-border higher education delivered in face-to-face formats?

Barriers to Global Distance Learning

Indeed, I acknowledge this percentage is a general estimate, but certainly a large majority of international higher education is being delivered on-site in face-to-face formats. Perhaps one reason is that countries that are spending considerable money for outside programmes, research and tech transfer perceive that having ‘real people’ in-country enhances quality and credibility.

Another potential barrier to global distance learning may be related to the pedagogical challenges of addressing the interconnected impacts of language, social norms, and cultural issues of open online teaching and learning. Moreover, these issues may be exacerbated if students are taught in English rather than their native language.

Technology is not culturally neutral. Can technology be perceived as a threat to one’s culture? Does not English bring with it cultural overtones that may be perceived as ‘cultural and linguistic imperialism’ by native students and educators? The answer is a resounding yes, sometimes.

Distinguished colleagues, open and distance learning must address the issue of access to the basic technologies and infrastructures necessary for effective teaching and learning. The digital divide is a reality, it is not fiction. There are diverse and often highly divergent levels of technology access.
between regions, nations, cultures, urban and rural communities, public and private education, and others.

**The Cultural Imperatives**

So how do we reduce these barriers to open and global distance learning? From a curricular standpoint, we must do better research on the core cultural, social and linguistic traditions of the host nation. We need to build stronger regional partnerships where there may be common cultural, social and language histories and traditions. And we must ask ourselves, what can our global students teach us? Yes, they are students, but they are also a resource to help us understand what the major obstacles are to global open and distance learning.

**Strategic Considerations for University Leaders**

Indeed, this commentary suggests that university leaders must address a number of key leadership and strategic issues. How do global distance education initiatives align with institutional mission and strategic goals? These initiatives should strengthen your university and enhance its capacity to provide quality education to students. Going global simply because other universities are pursuing these global markets, does not address the above question. Global open and distance learning must align with the mission of your university.

At the programme level, distance teaching must be aligned with instructional design formats that compensate and respect language, culture and social norms of foreign students. How do we create the most effective and culturally sensitive curriculum for our foreign students?

University leaders must also develop a risk management strategy for major international distance learning initiatives. What do I mean by this? Leaders must develop a strategy that allows the university to transition out of and end a partnership that is not working. It is interesting how quickly universities can often create partnerships and yet perplexing how long it often takes to end partnerships that are not successful. Sometimes university leaders must cut their losses, learn from the process, and prepare for future partnerships.

**The Global Future for Distance Learning**

In conclusion, the global distance learning market will grow significantly over the next decade. There will be unique international opportunities for creative and flexible universities who can leverage their resources, human and fiscal, to address many of the barriers mentioned today. We must keep our focus on effective teaching and learning . . . we must keep our focus on students. Technology is a powerful tool for teaching and learning. Its transformational capacity to exponentially expand educational access on this planet is undeniable. Education, and more precisely, quality education, is the manifestation of dialogue and interaction among and between students and teacher. It is the interactive and reflective communications between students.
And it is the dynamic interaction between the student and the intellectual content. These are the processes that transform learning environments for teachers and learners alike. When we use technologies to enhance these learning environments we also facilitate the creation, analyses, and dissemination of knowledge rather than just the flow of information.

From 1999-2005, the number of higher education students in China increased 458% to 15 million students. Today, the total is over 23 million. This is a remarkable achievement. This commitment to expanding access by you and your colleagues across China parallels of the fundamental ideals of open and distance learning: open access.

As we all know, educational enhances our lives, strengthens the cultural, social and economic baric of our nations, and creates the future foundations for our children and their children. Perhaps, most importantly, education expands our collective understanding, respect and acceptance of the diverse cultures that share this planet.

The Chinese word ‘Ming’ translates to English as ‘brilliant.’ I believe I share the sentiments of all my colleagues who are guests in your beautiful city and country in extending our congratulations to each of you for your ‘brilliant’ contributions to higher education in China. Well done.

I opened my commentary today with a quote from Liang. I shall close with a quote from a noted American author, Mark Twain.

Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do. So throw off the bowlines. Sail away from the safe harbor. Catch the trade winds in your sails. Explore. Dream. Discover.

The world of open and distance learning is there for you to explore, dream and discover. I wish you well on your journey.

(The Author: Don Olcott, Chief Executive, The Observatory on Borderless Higher Education (OBHE) and Chair, United States Distance Learning Association Board of Directors)
Borderless Education: Breaking Down Barriers through E-Learning and Effective Networking

Anuwar Ali

Abstract In recent years, there has been an impressive growth in borderless education primarily due to the following reasons: the growing imperative of higher education institutions to internationalise, the preponderance of ICT and the rapid growth in worldwide demand for education. This has led to very active discussions on this subject from both the perspective of the developed and developing nations, each trying to evaluate the benefits and costs of adopting such an education.

Based on the experience of Open University Malaysia (OUM), the first ODL university in Malaysia, I believe that developing countries do have the capability to harness ICT and other technologies for their human capital development to break down barriers that impede their socio-economic progress. An equally important endeavour towards this end is via developing effective networking particularly among countries in a similar stage of economic development.

In this paper, I will share on how OUM has effectively leveraged the e-learning component of its blended delivery mode. More specifically, the paper will discuss the e-learning practices at OUM, the challenges that we face and how we seek to overcome them. I will also share OUM’s efforts in developing and fostering strategic networking with other similar organisations in the region, the outcomes of which have been rewarding to all parties concerned.

The paper concludes with a firm belief that through a well-coordinated effort in e-learning and effective networking, ODL and other higher education institutions in this region will be able to galvanise our resources to fulfil common goals in providing quality education to all.

1. Introduction

In recent years, there has been an impressive growth in borderless education primarily due to the following reasons: the growing imperative of higher education institutions to internationalise, the preponderance of ICT and the rapid growth in worldwide demand for education. This has led to very active discussions on this subject from both the perspective of the developed and developing nations, each trying to evaluate the benefits and costs of pursuing borderless education.
What is *borderless education*? The term ‘borderless education’ is used to describe educational provision that crosses conventional boundaries of time, space and geography (Cunningham et al., 1998). According to UNESCO/OECD Guidelines on Cross-Border Higher Education, “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. Cross-border higher 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)” (UNESCO/OECD, 2005).

Based on the definition by UNESCO/OECD above, borderless education encompasses a myriad of higher education institutional establishments ranging from corporate universities, overseas branch campuses, open and distance learning (ODL) institutions and virtual universities.

### 2. Growth in Borderless Education

Borderless education is one of the offshoots of the globalization process. It is thus helpful to trace the factors that had led to borderless education in the context of globalization. The World Bank (2002) lists four significant trends in globalization:

1. The increasing importance of knowledge as a driver of growth in the context of the global economy;
2. The information and communication technology (ICT) revolution;
3. The emergence of a worldwide labour market; and

The drivers behind borderless education are strong and will continue to strengthen. They include (Bjarnason et al., 1999):

5. Technological developments;
6. Enhanced interest in lifelong learning in work;
7. Widening participation and encouraging access to post-secondary education;
8. Huge increases in the international demand for higher education; and
9. General introduction of market mechanisms into the public sector.

### 3. Barriers to Borderless Education

Notwithstanding the tremendous growth in borderless education as mentioned above, there exist considerable barriers to it particularly for adult learners:

1. Working adults are very busy with *many commitments*. As a result, they may not have the time to attend too many face-to-face interaction sessions.
2. Democratisation of education can only be fully realized when we provide education to as many people as possible. Thus, we need a delivery mode that has the ability to reach out to the masses.

3. Modern adult learners require personalized learning support and high degree of interaction. Our education system must be able to provide adequate support to address this issue.

4. Another factor that contributes towards mass education is affordability. Presently, the conventional mode of education is generally not cost-effective because of huge physical infrastructure requirements.

5. Today’s learners expect learning content to be rich in multimedia which the traditional mode of delivery is not able to offer.

6. For more effective learning, learners need to be able to access to a wider range of references which are accessible at anytime and anywhere. A conventional resource centre such a physical library cannot fully address this requirement.

As I had explained above, the conventional form of education, whereby students of a particular age group go to college or university full-time for a few years do have some obvious limitations in overcoming barriers to borderless education. On the other hand, I believe that e-learning using ICT and other appropriate technologies can help overcome these teaching and learning barriers. This is also important in countries which promote the democratisation of higher education, whereby the need to increase the supply of qualified and highly-skilled manpower has become an important policy initiative in economic development.

4. E-Learning and Borderless Education

Since the beginning of the internet from the US military-related scientific research (Hart, Reed & Bar, 1992), higher education institutions have been a heavy user of information technologies and have long been one of the most ‘wired-up’ institutions of our community. A combination of ‘push’ factors from media networks, especially hardware and software companies and ‘pull’ factors from university staff at various levels who recognised the potential of information and communication technologies (ICT) led to increased interest in the scope for convergent media technologies, such as the Internet and broadband cable and satellite broadcast. The developments brought about by technology allow for new possibilities. We are seeing trends in education toward distributed, collaborative models of learning. Agency is shifting from centre to periphery, from teacher to learner, from author to reader, from librarian to researcher, from curriculum to context (Ryder & Wilson, 1996).

Based on the experience at Open University Malaysia (OUM), the first open and distance learning (ODL) university in Malaysia, I believe that developing countries do have the capability to harness ICT as well other technologies for their human capital development to break down barriers that impede their socio-economic progress. In
that context, I would like to share with you the efforts made by OUM in leveraging on ICT and other technologies in delivering education in an ODL environment.

5、Networking and Borderless Education

There are many barriers that may prevent adult learners from embracing lifelong learning. Collaboration among educational institutions through strategic networking will help to overcome some these barriers. These collaborations may be in the following areas:

- Joint content development;
- Joint research;
- Joint conferences;
- Sharing of best practices;
- Exchange of learners;
- Exchange of staff; and
- Joint programmes.

6、OUM and Borderless Education

OUM was established in August 2000 as a response to the Malaysian Government’s call for the democratisation of education. This catchphrase refers to making education affordable, accessible and available for everyone. To achieve this, a simple yet powerful motto was formulated which served as a source of inspiration and motivation for us – University for All. Using this motto as our primary driver, OUM seeks to provide Malaysians a lifelong opportunity to pursue higher studies. The emergence of OUM was akin to giving a second chance to people who had missed out on higher education earlier.

OUM started out as an experiment to set up an efficient ODL provider of higher education programmes in Malaysia. It is a unique model, established as a private university under a consortium owned by 11 Malaysian public universities. It utilises the expertise of both the academic leaders of these public and other universities and the captains of industry to help develop its academic programmes.

As an ODL institution with a mission to educate the masses, OUM learners benefit from three things at OUM—flexible entry requirements, a learner-friendly flexible academic system and a blended learning pedagogy.

The blended learning approach employed at OUM is a boon to our learners. Through this approach, lessons are delivered to our learners using various modes. We have print modules, an online learning management system (myLMS) and face-to-face tutorials. This approach allows flexibility in the learning process, thus proving to be a big help to those who cannot afford to attend classes full-time due to family and work commitments.
The modules are produced with the help of a pool of subject matter experts (SMEs) who provide the content. These modules are then complemented with face-to-face sessions or tutorials at 61 learning centres situated in major cities and towns of the country. More than 7,000 tutors nationwide, from both public and private universities, have been specially appointed to conduct these tutorials.

The third element in this approach is the use of an internally developed e-learning platform called myLMS. This is a comprehensive and flexible e-learning system that enables lecturers and learners to interact in a virtual classroom environment and at the same time allows the institution to monitor learning and teaching progress. Through myLMS, learners can participate in online discussions and forums with their tutors and peers.

I am pleased to inform that myLMS has won several awards, locally and internationally. Among them are, “Runner-up for the Asia Pacific IT Award” from the Asia Pacific ICT Association, Kuala Lumpur, in October 2006; and “E-learning Recognition” from Eszterhazy Karoly College of Hungary. The latest achievement was the “Award in Excellence in Education Management” from Technology Business Review, Kuala Lumpur, in October 2007. Several local public universities have also purchased and used our learning management system, myLMS.

When classes first began, the number of learners and programmes was small. There were only 753 learners in August 2001 enrolled in 4 programmes. As a result of sheer diligence, commitment as well as increasing community awareness of ODL, we have succeeded in drawing over 75,000 learners to study in 51 programmes in the current session with 11 more to be offered in the next academic year.

Currently, OUM has 10 state and 51 local learning centres situated in every part of the country. Thus far, we have developed more than 500 modules using the expertise of subject matter experts primarily from public universities. As of our Sixth Convocation at the end of August this year, we have graduated more than 13,000 learners from our diploma, bachelor and master programmes.

Our learners come from varied backgrounds. They are teachers, civil servants, homemakers, corporate sector employees, members of the armed forces, nurses, retirees and the disabled. As Malaysia is a multi-racial country, our learners are from various ethnic groups as well. We have also broken the age barrier, drawing those in their 20s up to those in their 60s and 70s.

One of the most significant e-learning achievements was our completion of the e-learning project in the Kingdom of Saudi Arabia, where we provide consultancy services to its Ministry of Higher Education (MOHE, KSA) to establish a National E-Learning Centre (NeLC) which will become a national hub providing e-learning solutions for all the universities in the kingdom. MOHE, KSA has chosen OUM’s internally developed myLMS as the learning platform for NeLC. The acceptance of myLMS locally and internationally will further strengthen OUM’s position among the top ODL institutions in providing ICT solutions and e-learning.

Another of our ICT achievements, our digital library, currently holds 23 multi-discipline online databases, comprising e-books, e-journals, e-dissertations and e-
newspapers. The library has more than 52,000 e-books and 22,000 e-journals, making it one of the largest online resources in Malaysia. This impressive collection is easily accessible online from anywhere in the world.

For a relatively young institution, I would say we have come a long way. OUM’s myLMS has not only benefited our staff and learners but those outside of the campus community as well. Besides making our mark on home ground, through OUM International which was recently launched by our Honorable Minister of Higher Education, we have also ventured overseas. Our Centre for Graduate Studies has international learners in Yemen, Indonesia, Singapore and Bahrain. They are enrolled in our MBA, MIT and PhD programmes. Early this year, OUM held its first international convocation for its graduates in Bahrain. Eighteen graduates received their MBA scrolls from Bahrain’s Minister of Education. On the local front, we have a number of learners from 16 countries. Our undergraduate programmes have also expanded their wings to Maldives in May this year.

As mentioned above, e-learning is one of the mechanisms that can contribute to break down barriers in borderless education by providing greater access to education to the people. In fact, our experience at OUM has shown that e-learning can further enhance the quality of teaching and learning by providing learner-learner and learner-teacher interactivity, thereby enriching the entire learning environment. At OUM, the objectives of e-learning are:

- To enhance learner access to learning materials;
- To improve delivery efficiency by increasing the opportunities for collaborative learning and by making available course materials 24 hours a day and 7 days a week; and
- To improve learning effectiveness by encouraging learner interaction with tutors and course-mates to support and promote collaborative learning.

I am glad to inform that the implementation of e-learning has been very well received by our learners. This is evident by the tremendous increase in the use of our digital library and myLMS by our learners. The use of digital library has increased almost 10-fold from 61,659 hits in 2003 to almost 600,000 hits in 2007. Our learning portal, myLMS registered more than 40 million hits in the first half of 2008.

An Important-Satisfaction Survey conducted at the university has also indicated that the ratings in term of the importance and satisfaction for e-learning have improved significantly over the years. Our learners’ readiness in e-learning is rather high; over 50% and in some cases 75% are competent in using the various ICT tools in their learning. Their positive perceptions on the use of ICT in learning has a mean value of 3.2 out of 4 which clearly indicates that they are appreciative of the advantages that ICT can bring to their learning. In this regard, I believe that e-learning, appropriately implemented, would be a boon to the learners in other institutions as well.
7、Moving Forward

To move forward, higher education institutions worldwide need to unite under one common purpose to collectively promote borderless education. We need to have mechanisms that allow for organized, systematic and regular sharing, networking and exchange of knowledge and skills. There is an urgent need to embark on long-term and sustainable cooperation. For the Asian countries, in particular, we need to emulate the efforts of the European Community in establishing sustainable collaborations among our Asian countries.

We need to give priority to collaborating with other open universities in order to share and learn from each other’s experience. Our recent visits to Sukhothai Thammathirat Open University (STOU) and Universitas Terbuka Indonesia (UTI) are such examples. We have agreed to embark on staff exchange, joint research, joint e-journals, joint conferences and workshops, joint programmes, joint development and sharing of learning materials (including learning objects) and sharing of best practices.

More importantly, we need to provide quality education (Q-Education), that is, to improve on quality assurance, content development, e-learning delivery system, learning materials, assessment mechanisms, and physical learning and teaching facilities. One of our objectives at OUM is to promote the use of English as a medium of teaching and learning. In this regard, we need to leverage on the use of English as a pivotal instrument to collaborate in the delivery of our programmes.

Finally, we need to make borderless education more acceptable and more importantly, more equitable to all. In this regard, for us to forge even further, there need to be a better utilisation of technology, sharing of open education resources (OER), joint development of programmes, continuous enhancement of quality and effective sharing of best practices. We need to ensure that we are able to sustain borderless education so that many more will reap the benefits from it. One area that needs to be improved upon is human capital development, particularly in developing countries.

8、Conclusion

In this paper, I have shared with you OUM’s experience in maximizing the full potentials of borderless education. We have been successful in leveraging on ICT and other technologies in the form of e-learning to complement to our traditional face-to-face delivery mode. We have also enhanced our international networking with other regional and global open universities as well as our strategic presence in several countries. With all these efforts, I believe OUM has been able to break down the barriers to borderless education.

Finally, I strongly believe that while an institution can make a strong inroad into borderless education on its own, a collaborative effort involving the right partners through effective networking could do it better. In this regard, ODL and other higher education institutions in this region should jointly galvanise their resources to fulfil our common goals in enhancing access to quality education to all through e-learning.
References


Shanghai’s Practice and Exploration in the Building of Learning City

XUE Mingyang

Since 1999 when Shanghai took the lead in launching the program of building learning city in China, we have been making active efforts to search for the way to build a learning city that meets the needs of the socioeconomic development, so that the citizens may fully enjoy the fruits of the modern educational and cultural achievements. Today, I am very delighted to share with you the experience and reflections on building a learning city. My speech will focus on the causes, practice and exploration, and further consideration of building a learning city in Shanghai.

1. Causes of building Shanghai towards a learning city
   Shanghai is achieving rapid socioeconomic development. During the process of changing Shanghai to an international economic, financial, trade, and shipping center and a modern international metropolis, the building of learning city has become a fundamental task in the economic development of Shanghai, and has substantial realistic significance.

   (1) As an international metropolis, Shanghai has the duty to provide learning chances to all citizens
   As a typical city of immigrants and an international metropolis, Shanghai has attracted thousands and thousands of people from abroad or other areas of China. According to statistics, the people having their origins elsewhere account for over one third of the 18 million permanent residents in Shanghai. Many people with a domicile in Shanghai are new Shanghainese. People crowd into Shanghai, with a strong urge to attain further development. Development depends on a background of learning, which only occurs where extensive and sufficient chances are available. Shanghai has the duty to provide such chances to its citizens. Meanwhile, building a learning city and promoting comprehensive development of individuals, especially providing equal chances for individual development, are key elements of building a harmonious society. A learning city will provide equal learning chances for all its citizens, putting them on an equal standing for development and fair competition, which is the theme of the building of learning city in Shanghai.

   (2) Shanghai feels the urge to improve the abilities of the labor force as required by the industrial structure upgrading
   Shanghai is at an economic transition stage of industrial restructuring. With the development of modern tertiary industry and advanced manufacturing,
a large proportion of the labor force will shift from the low-end industries to high-end industries. To adapt to this change, Shanghai has to improve the abilities and qualifications of its labor force. It is estimated that the demand for technical workers will increase by over 5% every year by 2010. Among the technical workers of Shanghai, the percentage of senior technical workers will increase from the current 15% to 25%. Technical workers and senior technical workers will reach 5%, and senior professionals below the age of 45 will amount to 80%. As a city lacking natural resources but with a high level of economic, scientific, technological and cultural development, Shanghai has to propel its building of learning city and the upgrading of the educational and technological competence of the labor force.

(3) Citizens desire to improve their living standards and have diversified learning needs

The advancement of a city is reflected not only by the material aspects but also by its spirit. Building of a learning city, integration of learning into life and cultivation of the habit of reading will enable our citizens to live a better life in the spiritual respect and will contribute to further improvement of their living standards. In fact, after more than 10 consecutive years of economic growth at a two-digit rate, the average per capita income in Shanghai has increased considerably. With living standards improved substantially, the citizens show ever increasing cultural and educational demand. Over the most recent decade, the per capital consumption structure of households in Shanghai has changed considerably, and the Engel's Coefficient has dropped remarkably. According to statistics, food consumption of residents in Shanghai has dropped year by year from 56.5% in 1990 to 30% at present, and the consumption on education, cultural and entertainment services has risen year by year from 11.9% to 20%. Meanwhile, more than 80% of the citizens are willing to pay more for cultural and education services. It is evident that people care more about improving the quality of their spiritual life and that they wish to improve their abilities and competence through learning to fit in with the changing world.

It is due to the above-mentioned changes and needs brought about by Shanghai’s socioeconomic development that Shanghai timely sets a development goal of building a learning city. According to the plan, Shanghai will have established a basic framework of a learning city featuring “everyone learns at any place at any time”. The framework has four dimensions: (1) A social consensus of lifelong learning. Most citizens adopt the philosophy of lifelong learning and treat learning a lifestyle; (2) A full range of lifelong education system that provides good learning resources and relatively sufficient learning chances for the citizens; (3) A development mode diversified and extensive learning organization; (4) Joint force of individuals, community and government for the building of a learning city.
2. Practice and Exploration of Building a Learning City in Shanghai

In view of the reality of city development of Shanghai, the building of a learning city will be implemented in several steps. First of all, we will make use of the administrative advantage of the government to set up a government-directed lifelong education system. Then, we will combine and coordinate the efforts of all works of life to build a lifelong learning system for Shanghai’s citizens. Centering round this concept, Shanghai has made endeavors in various aspects of the building of a learning city.

(1) Promote lifelong education, diversify education network and improve lifelong education system

At present, the education network of lifelong education in Shanghai is composed of adult schools established and managed by the government, education and training institutions established and managed by guilds or firms, and education and training institutions established and managed by social groups and individuals. According to statistics, in Shanghai, there are 56 independent secondary and tertiary adult education institutions that offer diploma education, more than 2,100 non-diploma education or training institutions sponsored by the private sector, and 121 township technical schools for adults. Almost all neighborhoods and townships have community schools and schools for senior citizens, and almost every trade and large enterprise has its training center. In the meantime, Shanghai has basically built a three-level education system with community colleges as its principal part and neighborhood and township community schools as its backbone. With regard to the TV University which is scattered in 19 districts and counties, from 2000 on, the enrollment has been ascending at over 25% every year. A multi-level and multifunction lifelong education network is taking shape.

Based on these foundations, we are taking various measures to improve Shanghai’s lifelong education system. Firstly, we are working on a resources integration plan based on the continuous and adult education resources of higher education institutions as well as TV University and spare-time universities. Step by step, we are developing a system whereby different levels and categories of education may link with and supplement each other. By means of the system of recognizing and transferring academic achievements, we are offering citizens accessible, alternative and diversified forms and chances of learning. Secondly, we are taking full advantage of the instructions offered by Shanghai Office of Building a Learning City to community colleges, and trying to develop community colleges into an important carrier of secondary and tertiary adult education in the area concerned, an integrated platform of vocational skills training, a major venue of community education and an instruction center of lifelong Learning for citizens. In the mean time, we are boosting the standardization of community schools and township schools for adults. Thirdly, we are striving to foster a training system focusing on
different people to meet their learning demands. For example, in order to enhance Elder Education, we are establishing Elder Education Research Center, and Teacher Training center for Elder Education. Bearing in mind the needs posed by the industrial restructuring of Shanghai, we are developing a long-term system to train and transfer the agricultural labor force. This system, which is led by the district or county and implemented by townships, involves educational resources of the whole society, and will improve the quality of training and the employment rate.

(2) Set a basic information platform for lifelong education

So far, Shanghai has constructed one city-level central station and 19 district/county-level sub-centers of the satellite network platform for lifelong education. Satellite receiving terminals have been set up in 208 neighborhoods (townships). In addition, a pool of large quantities of quality lifelong education resources has been fashioned. In such a pool, 30% is on healthcare, 13% on etiquette and 21% on home education. The information platform provides 8 hours of live educational programs per day, and delivers more than 100 episodes of quality teaching videos to neighborhoods and communities. The convenience and accessibility of the information platform have largely stimulated the enthusiasm of the citizens about learning.

While actively employing the Internet and the satellite system to enable community colleges of districts and counties, community schools of neighborhoods, adult schools of townships, training programs of the residents’ or villagers’ committee to access and share educational resources, Shanghai is questing for a related management system to achieve further improvement and development of the modern information platform of lifelong education.

(3) Build learning organizations and carry on learning organization activities

According to the provisional assessment standards of Shanghai on building learning organizations, the education department of Shanghai, in coordination with related function departments, made a pilot assessment of some of the government agencies, communities, townships, public institutions and enterprises in their activities of building a learning organization. Based on this pilot assessment, the Assessment Standards of Shanghai on Building Learning Organizations has been formally promulgated. Besides, the related government departments have coordinated to formulate the corresponding administrative rules, define their respective duties and reinforce cooperation. Meanwhile, different organizations exchange their experience on building a learning organization, make joint efforts to find solutions, and clone the success.
Now, there are 10 state-level pilot zones of community education in Shanghai, four of which have been listed by the Ministry of Education among the nationwide exemplary zones of community education. There are also 54 city-level pilot community education streets and townships. The campaign of learning family is going on in thousands of households. Since 2000, Shanghai Municipal Education Commission has carried on the program of developing modern corporate education systems in 28 large and medium-sized enterprises and 32 guild or corporate training centers. Building learning enterprise has become an important goal of corporate development. The program of building learning organization has been initiated in more than 70 trade unions and more than 10,000 enterprises and public institutions. Moreover, the programs of building learning government agency, learning downtown, learning work unit and learning building are in full swing throughout the city.

(4) Organize learning activities of citizens and create brands of learning activities

Based on the concept of “integrate learning with everyday life”, we have planned and launched a series of learning activities for the public. Among them, there are influential well-known brands such as “Oriental Rostrum” and “Shanghai Book Exhibition” as well as popular and unique activities such as “All Citizens Learning Week”, “Reading Extensively for the Development of China”, “Household Internet Craze”, and “Etiquette Classroom”. These activities have become the labels of building a learning city of Shanghai. In addition, plenty of overseas training programs have been introduced into Shanghai, such as Chartered Financial Analyst, International Software Engineer, and Project Manager, which satisfy various learning needs. Through these learning programs and activities, the citizens are fascinated by knowledge, which in turn arouses their enthusiasm for learning and creates an ideal learning climate. These programs and activities play a very important role in improving qualifications and abilities and are hailed by the citizens of Shanghai.

(5) Improve the related mechanisms and update the lifelong education system

Shanghai is making full use of modern information technology and developing various mechanisms to promote lifelong education. For example, we have devised a “lifelong learning record”, which has such functions as learning account management, academic record as well as consumption and bonus of learning activities, and may help us gather statistics of the learning behaviors of citizens. Meanwhile, we are making great efforts in the study on mutual credit recognition among different educational institutions, and are working on a “credit bank” system which records, recognizes, stores,
accumulates and transfers credits. In fact, we have encouraged certain colleges and universities to recognize credits on a tentative basis. Furthermore, Shanghai is improving and strengthening its legislation to expand the extent to which social educational resources are open and shared so as to provide more educational venues and facilities and to motivate various full-time schools to provide more education services to the citizens.

Because of our hard work, remarkable achievements have been made in the building of a learning city. According to statistics, Shanghai has 17 district/county community colleges, more than 200 community schools and nearly 5,000 school branch campuses and teaching sites, covering 19 districts and counties, more than 200 neighborhoods and townships, and offering more than 600 courses in eight fields including social science, language, and natural science and technology. Now, the learning needs of various groups of people are basically met. An open, convenient and accessible lifelong education system is unfolding. The lifelong education and training resources have been basically integrated, the climate of lifelong education is taking shape, and the concept of lifelong education is being widely accepted.

3. Further Considerations on Building a Learning City

At present, building a learning city has been an inevitable trend of urban development. In order to exert the function of lifelong education in Shanghai’s socioeconomic growth, and to achieve comprehensive, harmonious and sustainable development of the people, we will make further quests in the following fields:

(1) Continue the management system reform and improve laws and regulations concerning lifelong education

At present, Shanghai needs to develop good and scientific management systems, better its planning on the building of a learning city, integrate the educational resources of the entire society, and ensure the healthy development of its endeavors to build a learning city. For this end, we should make further research on the legislation concerning lifelong education, clarify the rights, obligations and duties of the government, enterprises, public institutions and individuals, and construct the legal system to regulate the activities of building a learning city.

(2) Develop a mutual credit recognition mechanism and establish lifelong education accounts for citizens.

Shanghai will break down the barriers to “mutual credit recognition”, and improve the link and mutual recognition among different categories of continuous education so as to offer convenience to citizens in their learning. We will try to establish a “Lifelong learning record” system and a “Credit Bank” system in Shanghai, and give incentive for the citizens to take part in various
learning activities. We will also make research on the “No-barrier Entrance” and “Flexible Learning” systems, offering people the freedom to choose their own study hours, study forms, courses and examination dates that match their job and life.

(3) Develop a modern IT-based lifelong education service system

As the advantages of distance learning are getting more and more evident in the building of a learning city, we will find out how to build a learning city characterized by distance learning. We will further integrate the adult education resources of the city, districts, counties, and industries, fully utilize the modern information technology and our distance learning network to build a multifunctional, multi-level, accessible and open lifelong education service system that offers diploma education, vocational training, entertainment education and cultural education. We are to set up a city-district-neighborhood three-level learning support structure covering the whole city and facing the citizens, so as to deliver education services to every household.

(4) Diversify financing sources and create a fund assurance mechanism

The steady advancement of building a learning city is supported by a fund assurance mechanism with diversified financing resources. On the basis of the current investing mechanism, we will attach more importance to arousing the enthusiasm of varied organizations, citizens and enterprises to widen the financing sources of Lifelong Learning. While increasing its expenditure on education, the government should employ all sorts of policy levers, encourage and guide the enthusiasm from every side to form a joint financing mechanism in building a learning city, combining the funds from the government, enterprises, public institutions, social organizations and individuals.

Ladies and gentlemen, the building of a learning city is beneficial to the development of Shanghai, beneficial to the satisfaction of people’s learning needs, and beneficial to the upgrading of Shanghai’s spiritual civilization. In 2007, Shanghai’s per capita GDP reached USD 8,500, ranking among the moderately developed countries, which forms a solid foundation for our work to build a learning city. In the future, Shanghai will make further efforts, learn the valuable experience home and aboard, keep on making progress and innovations, keep on improving its education system, and provide all-round, multi-level, and diversified education services to every member of our society.

(The Author: XUE Mingyang, Director of Shanghai Municipal Education Commission)
Better Learning Better City: 
Mission and Responsibility of Open Universities

ZHANG Deming

I would like to begin my presentation by sharing with you two figures: The first one: I quote a piece of news (on Chinese Lunar New Year) from Xinming Evening News, a local newspaper enjoying over 1 million readership, that Google, the world’s largest search engine, issued its hot search in Shanghai in 2007, “Dianda, or STVU” was on the top list and it became the hottest topic in Shanghai; The second figure: 46246 students were registered with STVU, accounting for 56% of the total college student population in Shanghai this year and the number of students helps the University become the largest higher education institution in Shanghai.

The above mentioned figures not only reflect that residents in Shanghai attach greater attention to “Life-long Learning” but also demonstrate that STVU plays an increasingly important role in life-long learning system in Shanghai. STVU is the NO.1 choice for “further study” among employed people. This best reflects the missions and responsibilities as an open university. Missions for Open Universities in the New Century

Study and learning is crucial for everyone. As a Chinese saying goes: “If a child loves learning, it is like the sunshine of the morning; if an adult loves learning, it is like the sunshine at noon; if an elderly loves learning, it is like brightness of a candle.” Learning will make people feel achieved and pleasant; learning will make life more meaningful; learning will help the society to make progress; learning will make the city better. As a learning city, we will work together to create opportunities, to share success, to enjoy development and harmonious progress.

The knowledge economy is enjoying its rapid development and life-long learning is a compulsory task for every citizen. Thus, building a learning society so as to raise a nation’s comprehensive competitiveness is the fundamental objective of development in every country worldwide. Building a learning society is the request and of the new century and the must of history. “All people learning and life-long learning” has met new challenges both in terms of coverage of people and time. Open universities have witnessed such challenges as we are the pilots and major forces in open education and we need to prepare ourselves for such challenges. “For all learners, all for learners is the mission and responsibilities of open universities in the new century and is the approach for us to survive and the theme for us to pursue further development.

“For all learners” means that open universities shall provide quality education services to every one in the society on an equal footing. “All for learners” means that open universities shall create a learner-centred learning
environment providing services based on learners’ features and needs and provide them with an all-round development. Open universities shall utilize all their power and resources so as to help all learners to be successful.

Open universities shall set their feet in the “sea of people” and take a proactive altitude to provide service to all the learners. Therefore, the openness and sublimability of open universities can be realized. We must develop and adjust with the development of people and society and focus on the all-round development of people. We shall target both present and future development. Only by doing so, can open universities develop with people and obtain strong vitality and momentum of development.

Develop with the Time: The Practice and Exploring of Open Education

Shanghai is developing to become the hub of the international economy, finance, trade and shipping and working hard to be a modern international metropolis. As the most dynamic city in China, Shanghai has maintained two-digit growth for 16 consecutive years. The adjustment and optimization of industry has promoted the growing demand for talents: white-collars need life-long learning for professional and personal development whereas blue-collars need life-long learning to be competent for their current posts. It is known that Shanghai is one of the top 10 most populous cities in the world with nearly 1/3 people from other parts of the country and they are in bad need of learning to equip themselves to work and live in the city; in the meantime, senior citizens account for 1/5 of the total population and they need life-long learning to enjoy better life and upgrade their life quality.

——Involving all learners and establishing the open education concept of providing education services to all the people

“For all learners, all for learners”

We deeply feel the sublimability of missions and the significance of responsibilities of open universities and we are urged by such missions and responsibilities as exploring and practice:

Tolerance and openness is the features of Shanghai, a city of immigrants; “Welcoming all types of cultures and customs” is the characteristics of Shanghai, a city at the estuary of the Yangtze River. Because of its special development path and history, Shanghai is known to have the culture of fluidity and inclusiveness. In the Shanghai people’s eyes, all the people from overseas or from other parts of the country are all the people participating in the development of Shanghai and they are all given a name of “New Shanghainess”. The time requests open universities shall be more open than before and deliver education to all people on an equal footing. We shall understand that everyone is eligible to receive our open education.

Therefore, no conventional universities can rival STVU in terms of the diversified age groups of students and extensiveness of their profession. We
have students from the frontline of factories, farmers, staff from offices, taxi-drivers; we have overseas Chinese students, students from Hong Kong, Taiwan and we even have service people from satellites of “Shenzhou 5,6,7” soldiers from peacekeeping troops in Haiti. Li Bing, known as “Blue-collar Hero”, China’s model worker and Zhu Xueqing, people’s member of the NPC are all our outstanding students. The youngest students are only 16 or 17 and the oldest student, the 75-year-old Xie Baosheng is learning for her English major of junior college degree. Some students are learning for their first degree and others are for further study. Zhu Jie, PhD, expert in eye-ground disease is studying Law and Xu Yinzhe, Master of Law is studying Engineering Management. These years, we have seen a growing number of non-local students and a typical example is in No.1 Branch of Minhang District, 60% of 7912 students are from 28 different provinces of China. We have also seen many couple students, mother and daughter students studying together.

We have also seen disabled students with strong mind: Zhong Yanchun, a cancer patient who keeps on studying during her lifetime and obtained her graduation diploma in the last minute of her life; Yang Jie, who lost both his arms uses his mouth to paint and overcomes difficulties to learn to use computer and finished his study with distinguished scores; Zhong Haihong, an infantile paralysis patient, is a member of sitting volleyball player of Shanghai Team. She prepared for both 2008 Beijing Paralympics Games studying in STVU and finally won the championship in the Games.

Education conveys civilization and knowledge changes one’s fate. STVU helps to achieve many students’ dream of studying in college. Providing education to general labor force, open education is different from elite education. We know that general labor force is the major force in the society and the society will achieve an all-round and harmonious development only if the general labor has achieved their development. We strongly believe that education must face to all the people and we, as an open university must provide service to these people so as to improve our valve and gain support from all the people.

——Mastering the demand of the time, providing quality education to learners

Open universities shall have sharp insights of social issues so as to provide open education opportunities to potential learners, thus its flexibility and social functions can be realized. We have successfully grasped the opportunity of huge demand of talents in Shanghai’s “Four centres” development. We take a proactive approach and set up Finance, Logistics Management, Business Management and other sought-after disciplines in line with Shanghai’s Most Urgently Needed Talents Training Program. In the meantime, we keep on improving our courses and our education mode and provide a considerable number of qualified talents with practical skills for the modern service industry. The animation industry is booming in Shanghai and
there is a huge demand for such talents and we set up a discipline of “Animation Design”. This year, we focus on set up a new discipline: Metro Transportation, to fulfill the need of 20,000 talents in the field.

We conduct various technical training programs so as to meet the diversified needs of people at different levels. Some successful programs are as follows: The program of the Computer Application Capability Examination, which has witnessed its 15 years of exploration, innovation and optimization, is still a popular program in Shanghai and so far 4.1 million candidates have participated in the training, among whom, 1.89 million achieved certificates; ACCA, a Sino-UK-Hong Kong joint program has received over 700,000 trainees; 55,000 students have participated in EBA, which has become a famous program in quality education among the blue-collar workers in Shanghai; we have also played an important role in an initiative: “Welcoming the 2010 EXPO, To Learn English and Mandarin”, in which 1 million people in Shanghai involve. Various course-books with integration of multi-media have been published and this has provided people in Shanghai with learning materials and environment.

The practice has proved that learners are dominant in running educational institutions and open universities shall be learners-oriented. The foundation of a guaranteed quality education is that open universities shall understand that their responsibility is to provide learners with high quality education. If this foundation is becoming solid, open universities can get supports both from the government and from the society so as to achieve a sustainable development. Over the past years, we have independently designed and developed different multi-media teaching resources and, by making full use of our advantages in technology, we set up such sub-websites as “E-time”, “Literature Gallery” and virtual teaching practice bases including “Virtual Court”, “Virtual Machinery and Electronic Lab”; 10 study support platforms have been established; a “Mobile Campus” has been developed applying MP3, SMS and other technologies and it is very popular among the students.

——Utilizing open education resources and know-how, actively promoting the development of a learning city

History of development, ancient and modern, Chinese and foreign, has shown that the run of the process of any modernization contains different economic and cultural strategies. Shanghai, known for its modern cultural facilities, such as the Oriental TV Tower, Shanghai Library, The Grand Theatre and Shanghai Museum together with its abundant community facilities has witnessed a new framework of a “Metropolis with New Cultures”. People can enjoy diversified cultural festivals in the communities: Study Festival, Reading Festival and non-profit public lectures. All of these have demonstrated that Shanghai is in the process of becoming a learning city.

So what can do we do to contribute to such a process as open universities? How to bring our advantages into full play and how to make “For
all learners, all for learners” into practices? I believe that we should work hard as a promoter and contributor to create more life-long education opportunities in the building of the learning city and to provide quality education resources to establish a large life-long learning platform for the broad masses of the residents.

A “Virtual Campus” across city and suburbs of Shanghai has already been established and a “Three-in-one Network”: satellite communication network, telecommunication network and teaching system network are integrated. We have enjoyed our network capacity of 3130G, 265,841 course-wares, over 30 million visitors of our education resource database. The magnificent Learning World was set up; using the newest concepts and this helps us to enjoy the integration of campus and education service industry and a platform for different education institutions. We are also managing and maintaining the operation of “Shanghai Teacher Education Network” and “Shanghai Vocational and Adult Online Education Network” and other education networks. In the meantime, we are implementing our life-long education philosophy via our Online University for Senior Residents. The Online University for Senior Residents dispatches 3,559 connections in 19 districts and townships in Shanghai working for 276,000 senior learners and this accounts for over 50% of the total number of senior learner population in Shanghai.

Thanks to the support from Shanghai Municipal Government, the Guide Centre of Shanghai Learning City Development was set up in STVU, whose responsibilities include providing guidance as well as coordination to the work of conducting life-long learning education and the Centre has become a hub of Shanghai’s life-long learning education system. The Centre opens a more effective and easier channel for open education to be accessible to the communities and the concept of “For all learners, all for learners” will enjoy its further development with the help of this platform.

Over the past years, together with its over 50 branches, STVU is implementing its principle of “For all learners, all for learners”. The University has maintained its position as a Mega University for 6 consecutive years with 230,000 graduates at undergraduate and junior college levels. Over 500,000 learners have participated in different training programs in the University annually and this accounts for 25% of the total number of trainees citywide. At present, the total student population is 112,500, which means that 1 out of 3 adult college students is from STVU.

Known for its No.1 in student population, rich education resources, sophisticated open education concepts and advanced IT, STVU is always working for the people in Shanghai and provide them with appropriate learning opportunities, resources as well as service and indeed the University is Shanghai people’s “University by your side”. We are working hard to contribute to the development of building a learning city with a modern, flexible, open and harmonious concepts.
Progressing with the Time: The Strategic Thinking of Open Universities

Today’s achievements and brilliance will become the past results, but the mission and responsibility of “For all learners, all for learners” will accompany us to move forward. We have received praises and positive comments, nevertheless, we believe that STVU has only achieved certain progress and we need to develop our concepts and exploration.

—Open universities shall focus and enhance the establishment of brand of a quality open education

Quality is the lifeline of open universities. Open universities shall not only focus on the quantity issue, but more importantly, we must attach great importance to quality issue. With an increasing number of people recognize the concepts of equal education and open education; we have seen that today’s conventional colleges and training institutions have also been introduced in the open education sector. Therefore, only when open universities improve their development of quality education and brand building can they gain strength and competitiveness and achieve a stable and sustainable development.

There are many factors impacting the quality of open education which include the establishment of high quality teaching faculty, quality education resources and a well-established learning assistance, strict assessment system and comprehensive quality monitoring approaches. These years we have adopted an approach combining open entrance policy with strict teaching process and assessment management. We work with enterprises to cultivate talents seeking for a close tie between theory study and practical skills. The “Teaching quality assurance committee” was established to conduct the study, guidance and consultation for the issue of teaching quality. We are now working hard on a key program: establishing criteria evaluating the quality of our 110,000 learners with different learning and working background and this criteria will be used to guide our daily teaching practices.

—Open universities shall continuously better its tailor-made learning support system facing all the residents

It is an important component part of running an open university to establish and perfect its learning support system and it is also the fundamental issue of our ultimate goal to carry out “All for learners”. We have broadened our views in open education development and with the implementation of our target: “For all learners”, diversities have been both observed in the features of learners and their learning demands. The general public have a high demand in education products and education service and we have seen the necessity and the urgency of building a comprehensive, perfect and tailor-made learning support system.

Over the past years, we have conducted positive exploration in learning assistance and certain examples are: Student contact centre, One-stop
learning support centres across Shanghai and learning support platforms such as IT-based enrolment system, Online classroom platforms and Dissertation design and guidance system. However, these approaches are only the first step of diversifying learning assistance. The fundamental issue is the establishment, upgrading and improvement of such learning support modules and to achieve a tailor-made learning support to serve the diversifying, increasingly broad masses of the learners.

——Open university shall have the globe in view and venture in the international open and distance education market

The globalization and internationalization of open universities is an unavoidable trend. Therefore, we need to open to the world and take an active part in the international exchanges and collaborations. I believe that this is one of the reasons why we have observed a great number of international conferences on open and distance education have been held and this is also the reason why we see so many presidents of universities are here with us. Over the past years, joint programs have been set up with the US, Australia, Korea, Japan and other local universities. The sharing of education resources is also promoted in STVU. We believe that education resources and more importantly, education experiences shall also be shared internationally as we are in the time of globalization and internationalization. In June of this year, ICDE auditing experts were invited and we have learned from them the objectives, standard and requirements of open universities in today’s world. We have also published a series of books: “International Distance Education Classics” aiming at providing our Chinese colleagues with the research results of the international open education for us to learn and to share. If we say the fundamental issue of internationalization of open universities is the establishment of a “Non-boundary” strategic mentality, then we have achieved the first step of our “Inviting external experts and going out to learn”. But there is a lot more for us to do if we would like to achieve full openness to the world and venture in the international open education market.

Qu Yuan, China’s ancient great poet once wrote: There is a long way to go, we will have to keep on exploring through this adventure. After 48 years of development, STVU is in its mid age and we are decisive with rich and valuable experiences to face and deal with our next challenges. Shanghai, a beautiful city, has provided STVU its life, its strength, its opportunities and courage. In return, STVU will be working hard for this beautiful city. Taking the philosophy: “For all learners, all for learners”, we will work together with all of you to create the glorious career of open education!

Thank you for your kind attention!

(The Author:ZHANG Deming, President of Shanghai TV University)
1. Introduction: ICDE at UNESCO is at the crossroads between militant engagement and professional expertise

It is my great pleasure to be here in Shanghai with you, and to bring with me a new, an outside, and probably an unusual point of view on ICDE. It is quite a long time now since I was in your position, at the head of a large distance education institution; but I have kept in touch from the outside, as ICDE general delegate at UNESCO. I had been asked to talk today about “Regulation and Distance Learning”, which I shall try to do, but first of all I would like to share with you my experience of working at UNESCO, and also give you an account of my action as ICDE representative.

ICDE is an international NGO which has been in official relations with UNESCO since 1967. Thousands of Non-Governmental Organizations have contacts with UNESCO, but only 310 large international NGOs are in official relation with UNESCO. They are chosen for: a) their geographical representativeness; b) their quality of cooperation; c) their democratic legitimacy. Representing the “Civil Society”, NGOs help to implement UNESCO’s objectives. Let me tell you a few words about what this means, and why it is important for ICDE to belong to this community.

My involvement at UNESCO as representative of ICDE within the framework of civil society and the NGO community has been continuous over the last 15 years. But it changed dramatically last December when I was elected President of the International Conference of NGOs. This conference is a gathering of all NGOs in official relations; it takes place every two years to elect its president and a Liaison Committee of 9 members, adopt its programme of action, in which all NGOs will become partners, according to their specific expertise, to help implement UNESCO’s programmes in its 4 main fields of competence, i.e. Education, Science, Culture and Communication.

Usually when you speak to people about NGOs they immediately think of humanitarian organisations, usually devoted to the relief of extreme poverty or to the defence of human rights. Indeed some of them are more “caritative” like OXFAM or Action Aid. Others are more professional like ICDE, which is the acknowledged representative for open and distance education. As one of the most important global non-governmental organizations in the world of education
and training, ICDE has been for more than 40 years now an official and active partner of UNESCO in the fields of distance education and of educational technology. For instance an important part of the literature published on the subject by UNESCO is of ICDE origin. This long-standing relationship between ICDE and UNESCO is in constant development, as education becomes an ever greater challenge at global level, and as solutions, can be found in the extensive use of information and communication technology for education, as is brilliantly demonstrated by our Chinese friends.

But to come back to the community of 310 NGOs, one can see that it is extremely diverse and that the expertise of its members covers all kinds of domains: education, law, culture, science, religion, philosophy, economy, communication etc, a diversity which sometimes makes it difficult to organise their collective work to support the implementation of UNESCO programmes. This organisation of their work in common is the main function of the Liaison Committee of 10 members, which I now chair. The major activities of the Committee consist in:

- organizing the International Conference of NGOs every 2 years;
- taking part in the joint programme committees and working groups set up by UNESCO;
- taking part in collective consultations on the main issues treated by UNESCO and in regional consultations;
- setting up commissions and organizing special events.

It is a position of growing responsibility and political influence, especially since the role of NGOs, and of civil society at large, is being considered with an increased interest by member states and by the international community. The question of a more open dialogue, a more direct partnership, and even of a new balance of power between governments and civil society is now being debated, especially since the Cardoso report on this subject delivered to the United Nations in June 2004. It belongs to us NGOs to increase our influence and legitimacy as strong partners of intergovernmental organizations.

Our work with UNESCO is carried out within working groups which we call “joint programmatic commission” meeting regularly and proposing ideas and actions in conformity with the programmes of the 4 main sectors: Education, Science (both hard sciences like Maths, physics, chemistry, and Human and social sciences), Culture, Information and Communication. ICDE is at the crossroads of 2 sectors, Education and Communication, and working with both of them.

As a professional organization, ICDE can bring considerable expertise to UNESCO, and develop its own global influence, which it does and has done for
long. On the other hand, UNESCO is always for us a sort of permanent workshop on education issues, as was recently the case for the ICDE OER Task Force which had held its first meeting at UNESCO in Paris some 2 years ago.

But as a member of this great community, ICDE also has to share its values and responsibilities for the implementation of a global policy. The main lines of this policy are adopted every two years at the International Conference, usually held in December. A resolution is then adopted democratically, defining our main programme, as well as a general policy line which can be currently summed up as the reinforcement of civil society for the promotion of democracy at global level. A vast programme indeed, but which has elements of application for all NGOs concerned, whether humanitarian or professional. We all share a militant engagement and seize the best opportunities to realize it. For instance this year being the 60th anniversary of the Universal Declaration of Human Rights, a large part of our activity has been devoted to the question of Human Rights, among which access to Education is prominent (article 26). I shall come back on it later. It gave us all the opportunity to realize and reassess, that Human Rights are the backbone of our common action and that, more than ever, the Universal Declaration is the horizon of our common action.

For all those reasons, the International NGOs are entitled to claim a four-fold legitimacy in their global action and the sometimes uneasy partnership with governments and member states:  
- a legitimacy of action and intervention at local and national levels;  
- a legitimacy on ethics, as bearers and defenders of global values, for instance in the Defence of Human Rights;  
- a democratic legitimacy, as representatives of citizens and peoples of the world with a capacity to be their mouthpiece and the bearers of their messages;  
- a professional legitimacy through the great variety of our knowledge and know-how.

I wanted to describe this general background in my introduction, first because it is only since I have been chairing the NGO community that I have fully realized the unavoidable entanglement between the two approaches, professional and militant, and second because I think it sheds a new light and gives a new outreach on our work in progress in various fields.

2. A short account of my activities at UNESCO on behalf of ICDE.

There are currently several issues or events, in or around UNESCO, which deserve ICDE’s attention and participation. 3 main points can be examined
today, which bear upon the definition of an ICDE strategy for the coming months and years:
- the issue of ICT in education;
- the follow-up of WSIS;
- current events concerning EFA and higher education.


The issue of ICT in Education and e-learning has recently been given a new and greater attention, in the Education sector of UNESCO. It may be a consequence of one or two important reports on the subject, including my own survey report of 2006 on *ICT and Education at UNESCO 2000-2005* (see the executive summary). An important Strategic planning seminar (involving both the Education and Communication sectors) was held for three days (29-31 July 2008) in Paris to define a policy and create a UNESCO network on the use of ICT in education. My above-mentioned report was one of the founding documents, and I think ICDE should play a decisive part in such a network.


The overall aim of this work was to make a complete survey of all initiatives taken by UNESCO – at all levels and in all its branches, bureaux, institutes, field offices – on the issue of ICT in and for Education. Everyone at UNESCO knew that many things had been done in that field but without an overall strategy and with too little coordination. 2005-2006 was the final lap of the WSIS phase 2 in Tunis, and I was asked to make a survey of everything that had been done, with some recommendations for better coordination for the future. It was a difficult job and it took me a good year’s work, to cover only about 30 to 40 % of all the material to consider. And I took into account only the most recent initiatives, based on digital technology and the Internet. It included publications, conferences, various projects and activities at local, national or regional levels and of course many references on the web.

The survey was divided into 4 main sections:
1. **Policy** = a section dealing with policy matters to illustrate the efforts of UNESCO to support education authorities, decision makers and educators in their approach to the question of ICT and Education and to help them answer the question: “why and how to build a strategy of ICT integration”. The definition and analysis of indicators was essential for that matter.
2. **Training of Teachers.** It has been for years a top priority of UNESCO as it is now admitted that an adequate application of ICTs to teachers’ training could greatly reduce the enormous deficit of qualified teachers, especially in LDCs. The survey enabled me to discover, for instance through all the projects reviewed, that without being aware of it, UNESCO had developed a kind of
“circular strategy” for teacher training in ICTs, each circle covering a wider area, and each proposing a different of framework for action. I have called them respectively: /the awareness-raising framework/ the pioneer-teacher framework/ the cascade model framework/ the ICT Portal for Teachers.

3. **Teaching and Learning** = a section devoted to the integration of ICT into the curriculum, and to ICT into Open and Distance Learning, with special reference to projects in the E-9 countries.

4. **ICT beyond borders of formal education** = this section dealing (or trying to) with the jungle of initiatives launched to cover the special missions of UNESCO: EFA, Lifelong Learning, Literacy, Adult Education, Education for Special Needs, Non-formal education etc.

And the conclusion came out with 3 main keywords: Collaboration, Openness, Synergy.

2.1.2. **A new contribution of the Education sector to ICT for Education’s work.**

Owing to various reasons (a new ADG at the head of the education sector with the creation of new ICT unit, a stronger will to implement inter-sectoral projects and initiatives, the realization that outside funding was easier to collect on that kind of project, the influence maybe of such already mentioned reports ) the Education sector of UNESCO has decided this year to give a new impetus to the question of ICT in Education.

To set the ball rolling, an important strategic planning seminar was held at UNESCO headquarters for 3 days at the end of July this year (29 to 31 July). 42 staff members attended, coming from 30 different units over the worlds. I was invited as expert, my survey report being one of the main reference documents. The important result of this meeting was the creation of an ICT4ED working group which will continue its collaboration on the web as a UNESCO network, with expertise from outside partners like us.

Mission, priority areas and initial areas for joint project and fund raising were discussed. The final conclusions are yet to be endorsed by the two ADGs (Nicholas Burnett for ED and Abdul Khan for CI), but some outlines can already be revealed:

a) **concerning the mission of UNESCO:** UNESCO promotes:
- a permanent global debate on education and learning for all and ICTs;
- ICT as levers for educational system change;
- using ICTs effectively in the learning environment: for learners, teachers, and content.

b) **concerning priority areas:** they will be:
1. Plans, strategies, management, indicators, monitoring and evaluation
2. Teacher education
3. Facilitating teaching and learning
4. Open access including open educational content and curriculum
5. Distance education including higher education and lifelong learning
6. Information literacy
7. ICT beyond formal education
8. Infostructure and infrastructure.

C) concerning initial areas for joint projects and fund raising: they will be:
- Website
- Open resources
- Methodological guide and policy briefs
- ICT and education indicators
- Digital opportunities in LDCs
- Teacher capacity development.

I think that such a strong intention and energetic drive on the part of UNESCO at top strategic level on ICT and Education is of high importance for ICDE, that it has to be attentively supported by us, both at global level and at the level of our institutional members where we could become more than observers but actors, and that once again ICDE can play an important, even decisive role as UNESCO partner.

- 2.2. The WSIS and after: the implementation of the Tunis Plan of action.

Without going too far in the past you may remember that ICDE had been actively engaged in the preparation (the PrepComs) and in both sessions of this World Summit on the Information Society, held in Geneva with some 15 000 participants (December 2003) and in Tunis with 24 000 participants (November 2005). We had been especially active, with UNESCO, to promote Education as a major issue (whereas at first it was not considered as such by ITU the initiator of the WSIS) and make it visible in that large global event: During the Geneva session, a position paper had been presented by ICDE on the theme “Teachers’ Training, Central Challenge for Knowledge Societies”. Thus you can understand that I remain permanently on the watch, as ICDE representative at UNESCO, to see whether education remains in that top position in the follow-up process of the WSIS.

Since Tunis, the implementation of the Plan of action adopted then has been rather slow to begin, many governments being reluctant to tackle the difficult questions of the Internet governance and of the funding of the Internet Society. Yet an important aspect of the follow-up of the WSIS is that UNESCO (through its CI sector) has been put in charge of an important part of the plan of action:
holding 6 action lines among the 11 adopted in Tunis, the most important for us being:
- action line C3 = Access to Information and Knowledge;
- action line C7 = E-learning and E-science.

Consultation meetings have been held in Geneva in May 2006, May 2007 and May 2008 in which all stakeholders were invited, including Member states, IGOs, private sector and civil society including NGOs in official relationship with UNESCO. I was unfortunately unable to attend the Geneva meetings for lack of adequate funding. Those meetings were mainly organisational, an important outcome being the opening of an online platform by UNESCO, entitled “UNESCO’s online platform in support of the implementation of the WSIS Action Lines”. Another important event in May 2008 was the “Global Event on Measuring the Information Society”.

The main problem with the follow-up of WSIS is that organization is very difficult, due to the global scope adopted and to the enormous number of stakeholders and potential number of participants. So it seems that a new policy begins to be adopted for the next meeting in May 2009 in Geneva: launch a call for concrete projects on only 3 or 4 cross-cutting themes. Projects also that would not be global, but implemented at national or regional level. Obviously Education will be one of those cross-cutting themes. And ICDE could certainly think of proposing a project on OER with the experience it has gathered through its Task Force.

I refer you for more information, to the WSIS websites
At ITU: http://www.itu.int/wsis/index
At UNESCO: http://portal.unesco.org/ci

- 2.3. Two important UNESCO events in Education:

2.3.1. The EFA meeting in Oslo;
The World Conference held at Jomtien (Cambodia) in 1990 had launched the ambitious programme of “Education for All”, to fight illiteracy and provide education all over the world, even for the poorest, boys and girls. EFA has since become the major priority programme of UNESCO. The World Education Forum was convened in Dakar (Senegal) ten years after, in April 2000, to assess what progress had been made towards that ambitious goal.

ICDE was present and active there with other large educational NGOS. Although the evaluation of the situation was disappointing, ICDE showed that ICTs could be usefully applied to developing countries, and not only to rich countries, with 4 principles of use:
priority to a collective use of technology;
- use less advanced technology (radio) when necessary;
- give wider access to locations equipped in ICT (schools, libraries, training centres);
- give top priority to the training of teachers and tutors.

To pursue the implementation of the EFA Global Initiative, A Collective Consultation of NGOs was created at UNESCO in March 2001 to formulate proposals on various aspects of the financing of EFA, resources and mechanisms. The consultation was then chaired by ICDE. Since then ICDE has remained active in the follow-up action.

The Education for All Programme remains the top priority of the Education sector at UNESCO. I was recently invited to attend again (this time in my capacity as president of the NGO/UNESCO Liaison Committee) the meeting of the CCNGO (Consultative Consultation of NGO’s) working group to prepare the next high level meeting on the subject. The High Level Group of EFA (composed of member states, with a few, very few, NGOs as observers) will meet in Oslo in December. It would be relevant for ICDE to get more involved in the EFA programme, especially in the field of teacher training.

2.3.2. The 2009 World Conference on higher education.

Since the World Conference on Higher Education of October 1998, which was partly devoted to the implementation of online courses and “virtual” universities, ICDE has been a close partner of UNESCO in that field. I was actively involved in its preparation with a text on “the potential of technology to shape the future”, in the Conference itself with a paper delivered in plenary session on “the university considered as a public service”\(^1\), and in follow-up action with papers\(^2\) (in 2000) to show:
- the role played by national Open Universities for equal access to higher education;
- the new capacities in learning opened by ICT systems;
- the creation of virtual universities and the role of ICDE as a laboratory of ideas and expertise.

The follow-up action was pursued in 2002, 2003 and 2004 with ICDE’s participation in several consultations of experts and international seminars, and an active participation in the new World Conference on Higher Education (June 2003) where ICDE chaired the workshop on “Higher Education as a Public Good”.

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1 Bernard LOING Quelques Considérations sur l’université comme service public.
The new World Conference on Higher Education will be held at UNESCO headquarters from 6 to 8 July 2009. This conference comes as follow-up of the previous Conferences in 1998 and 2003. We shall try to have a similarly involvement in 2009 in order to re-affirm the importance of the distance education sector. Preparatory regional conferences are being currently held on the five continents; the first one took place in Cartagena in July 2008.

3. A discussion on the issue of state regulation for education, with special reference to Distance Education and the “merchandizing of education.”

Let us take the Universal Declaration on Human Rights as the starting point of our discussion on the issue of state regulation for education versus the merchandizing of education.

As I told you before, our work this year at UNESCO was focussed on Human Rights with the celebration of The Universal Declaration 60th Anniversary. This extraordinary document had been indeed adopted on 10 December 1948 in Paris, by the 56 States present at the conference. Extraordinary document because one of the most translated in the world but very little read, and known by very few people, a declaration to which lip service is paid every day by most statesmen all over the world, but practically nowhere put into practice; an extraordinary document aimed at the far future, but now standing in front of us to be implemented as the unavoidable corner stone of democracy.

And in a way it is probably the best starting point for our discussion on the issue of state regulation for education. As you know, one of the 30 articles of the Universal Declaration is devoted to education. It is article 26 which holds 3 propositions:

1. Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all on the basis of merit.
2. Education shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, racial or religious groups, and shall further the activities of the United Nations for the maintenance of peace.
3. Parents have a prior right to choose the kind of education that shall be given to their children.
To sum up, the right to education is universal, and access to education is set up as a fundamental human right. Education must be made available at all levels by the states concerned, and is to be provided free of charge at elementary level. As a matter of principle, access to education is a right common to all human beings, and as such cannot be considered as a marketable service.

Of course we all know that the Universal Declaration, although universal and solemn, is just a declaration, and that no legal mechanisms have been adopted to make it compulsory. In no way is it a treaty or a covenant. This the reason why, in the field of education, the world had to wait for 42 years before beginning to launch an attempt at implementation at world level, with the programme Education for All, adopted at the Jomtien (Cambodia) Conference in 1990. Since then the implementation of this programme – although a top priority for the UN and UNESCO – has been rather slow. As I said before, the programme was given a new impetus at the Dakar Conference in April 2000 and EFA became one of the MDGs (Millenium Development Goals). Since then, too little progress has been made to reach all the expected goals by 2015.

Within the general framework of EFA – which concerns mostly elementary education – distance education and e-learning have had a minor share; although in my opinion they should be given a central position. There is especially a case to be made for the thousands of teachers which will have to be trained if the aims of EFA are to be reached by 2015.

But let us now focus on the question of a regulatory framework for education, which I think stems directly from article 26 stating that education is a public good and that access to education is a universal human right. We all know that the debate about education considered as a public good versus education considered as a marketable product has now been going on for years, somehow following trends remarkably similar and parallel to those that can be observed today in the world of economy and finance. Should education be considered as private business (whatever the nature and level: primary, secondary, higher education, adult education and professional training), or should it be managed and dealt out by public authorities, and at least strongly regulated by them? We all know also that distance education and e-learning – central in what is generally referred to as “cross border” or “trans-national education” – should, for obvious reasons, be at the core of this debate in the general context of globalisation.

The debate became acute with the inclusion, by the World Trade Organization, in its General Agreement on Trade and Services, of Education as one of the 12 service sectors that should be open to free trade by removing all existing barriers. This measure has had supporters who highlighted the potential benefits
that more trade can bring in terms of innovations (through new providers), of delivery modes, easier access, increased economic gain. But it also raised strong criticism emphasizing the threats to the role of government, to the “public good”, and to the quality of education. Recently, the voice of critics seems to have grown stronger than that of supporters, but the debate is far from being over.

The reason why I thought it might be useful to discuss again this issue is the fact that about a year ago, the Belgian government –on its French-speaking side (the Government of the French Community of Belgium) - launched an initiative to re-examine this issue. An important seminar attended by some 160 personalities including diplomatic representatives from some 50 states as well as academics, members of NGOs, private sector and civil society, was held in Brussels on 23 May 2008 and came out with a platform of recommendations for the next Conference of the International Bureau of Education in November in Geneva. This platform has been taken seriously enough to be officially put on the agenda of the Conference.

The recommendations aim at encouraging the governments to fully keep control of their educational system with a high level of equitable access, quality of service, and cultural diversity; and to impose the same requirements to the private schools and other services of education that are officially recognized. It also aims at creating a network of states, especially among less developed countries, to share information about the economy of education both public and private (for instance to measure the effect of private funding on national public systems of education), to exchange good practice, to reinforce multi-stakeholder partnership between national public authorities, intergovernmental organizations, competent NGOs and civil society representatives. In this text UNESCO is invited to carry on the reflection and discussion on the regulatory role of the State on its education services.

Of course, such a platform of recommendation could be criticized as excessively authoritative and centralized in favour of governments and ministries of education. It could be seen as inspired by systematic enemies of free markets as sometimes the Europeans and especially the French appear to be, at least on the other side of the Atlantic. To show how this debate is relevant in those days of financial crisis, let me quote an article by Alex Berenson in the NY Times a few days ago. It was entitled “How free should a free market be”? I quote: Is the era of free market over? The overall belief was that less regulation would produce broad prosperity even at the cost of greater inequality. But now America and the rest of the capitalistic world is shifting away from faith in markets and distrust of governments. The new American president will have to strengthen financial regulation. But Americans are fundamentally suspicious of government in a way
that Europeans are not, a cultural and political difference that stretches back centuries. And the author concludes, quoting David Ruder, former chairman of the Securities and Exchange Commission in the USA: This country is built on an appetite for risk; we don’t want to be France. A statement which is probably true, America being based on a culture of pioneers, a culture of emancipation from a colonial situation; whereas the success of European countries was based on the gradual growth of a collective, mutual organization from smaller, poorer and less developed entities.

But let us come back to the issue of a state regulation as proposed in the Brussels platform. With its provision for a collective effort and organization, it probably comes in time as a safety measure to protect some less developed countries where failing public educational systems tend to be replaced by private offers, either too expensive or of poor quality.

The problem is that, in this Belgian initiative, the issue of distance education, although so central to any kind of cross-border education, seems to have been rather neglected, or overlooked, by the authors of the “platform”. I have been in touch with them over the last few months, but was unable to attend the preparatory meetings leading to this declaration, and thus unable to introduce the necessary reference to distance education. This is why I now turn to this assembly, and to ICDE executives, to suggest if not the creation of a Task Force similar to the one on OER, but the participation of some of us to the future developments of this initiative, which fully belongs to our field of competence. Martha Mena had expressed her interest and I thank her very much for it, but we would certainly need a few volunteers – which I could link both with UNESCO and with the Belgian authorities – to have some influence, as ICDE, on the future developments.

Conclusion.

In my conclusion I would like to insist again on UNESCO’s and ICDE’s common approaches to educational issues. The Organization has long been interested in open and distance education as a means of providing solutions for some of the major problems in the field of education, such as “education for all” or “reaching the un-reached”. The educational priorities of UNESCO are shared by ICDE such as:

- extending the field of lifelong learning;
- opening access to education at global level;
- providing the best training at the lowest cost.
UNESCO wants to promote endogenous capacities in open and distance learning. It does not intend to create its own institutions for ODL; but it will identify and help the actions launched by the member states, or at grass-root level. So it needs an expertise which ICDE can provide, both locally and through its global experience and extension.

UNESCO wants recognition of the diplomas delivered by means of ODL systems. ICDE’s expertise in the field of quality assessment and certification in trans-national education is relevant on that issue.

UNESCO wants to extend cooperation with global networks in ODL: this priority policy is obviously at the core of ICDE partnership with the Organization, ICDE acting also as a network of networks in distance education.

UNESCO, like ICDE, wants to develop the use of ICTs in their application to education and training, both at higher education level especially for teachers’ training, and in the implementation of its “Education for All” programme.

Thus, in the various fields mentioned above, ICDE is comforting its position as a major partner of UNESCO, and one can say that its position as a global NGO is privileged and central. Our approach is built on a combination of militant engagement and expertise in the combined fields of Education and ICT. Through its engagement in the UNESCO community, ICDE can play an important part in fostering the transition, now in the making, from a global Information Society, to the building of open and equitable knowledge societies.

I had told you in my introduction that I was coming as an outsider, or rather as the bearer of news from the outside world, but a world seen from an international position which, I admit, can be felt as less real than the one you have to deal with in your high functions at the head of major academic institutions. But let me tell you that from my position, I have the feeling that it is both a world of great progress and of major crisis, a world in which mankind is groping – more or less blindly – for more justice and better democracy, that we won’t reach it without better education which it our responsibility, and that somehow, we are at the crossroads.

* * * * * * * * * * * * *
Introduction

In 2001 the Massachusetts Institute of Technology (MIT) launched its Open Courseware initiative. Since then the now called “Open Educational Resources” (OER) movement is spreading around the world. In the arena of open, flexible and distance learning several significant initiatives have been undertaken, for example in Europe: Open Learn by the Open University in the UK, Open ER by the Open Universiteit Nederland (OUNL), and MORIL (Multilingual Open Resources for Independent Learning) by the EADTU (European Association of Distance Teaching Universities) and its members. Organizations like UNESCO have taken an interest in this development from the moment it started. There is a particular relevance of OER for developing countries. OER combine with open, flexible and distance learning can even be of more value in contributing to easier and better access to education.

Recognizing the importance of this movement, and based upon discussions between ICDE (International Council for Open and Distance Education) and UNESCO at the ICDE SCOP Meeting in Lillehammer in June 2006, ICDE decided to establish an ICDE Global Task Force on Open Educational Resources, involving members from different continents, cultures and educational approaches. This new Task Force (TF) was announced during the 22nd ICDE World Conference invited the TF to hold its kick-off meeting at UNESCO's Headquarters in Paris in November 2006.

The ICDE SCOP Meeting hosted in June 2007 by OUNL in Heerlen was fully devoted to OER with the theme ‘Open Educational Resources as an instrument for achieving Education for ALL’. This SCOP Meeting was instrumental to advance the work of the TF on the basis of its Interim Report presented to SCOP 2007 by the TF Chair, and to further develop the thinking among SCOP participants on OER as an innovative and challenging concept as well as on OER strategies and implementation scenarios. The TF had a meeting next to the SCOP Meeting in Heerlen, marking the major conclusions and recommendations of the SCOP Meeting and agreeing on how to proceed. The TF has finished its work by delivering its Final Report to the ICDE SCOP Meeting hosted by Shanghai TV University in October 2008 and by having this report accepted by ICDE.

This Final Report has the following chapters:
1. Scope and composition of the TF
2. Results of an Inquiry regarding OER among the ICDE membership
3. Outcomes of the 2006 kick-off meeting of the TF at UNESCO’s Headquarters in Paris
4. A series of ICDE flavored review notions of the OECD Report on OER
5. Outcomes of the 2007 ICDE SCOP Meeting at OUNL
6. Further developments after ICDE SCOP 2007
7. Conclusions & Recommendations
8. Epilogue: does India show the way?

1 Scope and composition of the Task Force
The ICDE Global Task Force on OER is-through its members-connected to several world regions, links to other initiatives on OER, and includes a representation from UNESCO.

The TF has the following members:

- Fred Mulder (Chair), Rector, Open Universiteit Nederland, The Netherlands
  (also Chair PC 2007 ICDE SCOP Meeting-Heerlen/NL, Chair PC 2009 ICDE/EADTU World Conference-Maastricht/NL, and Chair EADTU OER/MORIL Task Force)
- Nick Allen, Provost, University of Maryland University College, USA
- Susan D’Antoni, Programme Specialist, IIEP, UNESCO
- Stuart Hamilton, CEO, Open Universities Australia, Australia
- Helmut Hoyer, Rector, FernUniversitat in Hagen, Germany
  (also acting ICDE President until the end of 2007)
- Sally Johnstone, Vice President Academic Affairs, Winona State University, USA
- Fredric M. Litto, President of ABED, Brazil
  (also member ICDE Executive Committee as of January 2008)
- Bernard Loing, ICDE Permanent Delegate to UNESCO, France
- Frits Pannekoek, President, Athabasca University, Canada
  (also ICDE President as of January 2008)
- Paulina Pannen, Director, SEAMEO Regional Open Learning Centre (SEAMEO SEAMOLEC), Indonesia
- Barney Pityana, Vice Chancellor, University of South Africa, South Africa
  (also member ICDE Executive Committee as of January 2008, former ACDE President)
- Reidar Roll, Secretary General, ICDE
  (until Spring 2007)
- Tarek Shawki, Chief of Section Information Society and ICT in Education, Science and Culture, UNESCO
- Atwi Suparman, Rector, Universitas Terbuka, Indonesia
- David Vincent, Pro Vice-Chancellor, Strategy Planning and External Affairs, The Open University, UK (also EADTU President).

Furthermore the TF is supported by:

- Jos Rikers, Senior Officer International Relations, OUNL
  (also Chair Organization Committees of the 2007 ICDE SCOP Meeting - Heerlen/NL and Of the 2009 ICDE/EADTU World Conference - Maastricht/NL)
- Ana Perona, Assistant Secretary-General, ICDE Secretariat (part of 2007: Acting SG)
- Nina Bagley, Chief of Information and Membership Services, ICDE Secretariat.

The mandate of the Task Force is to develop a report on Open Educational Resources. This report is aiming to contributing to the global movement of OER, adding specific ‘ICDE’ flavour and value by adopting the self-and-distance-learning perspective rather than the current mainstream content-in-classroom perspective.
The report will deal, among others, with:

- Availability/access
- Intellectual property rights
- Internationalization versus Localization of content (regarding language and culture)
- Learning communities support
- Quality control
- Financing and sustainable business models
- Interfacing with regular degree studies
- Possibilities to bridge between informal, non-formal and formal learning
- Diversity in target groups
- Experiences/good practice with existing offers, various options, misuse, benefits to offering institutions
- Potentials for developing countries from using OER
- Changing roles of the Public and Private sectors
- Other issues considered relevant by the group.

The TF will aim at producing a report that will serve, among others:

- to Higher Education / Open and Distance Learning institutions in their decision on introducing (or not) OER activities as a provider or as a recipient
- as a promotional basis for the OER concept
- as a guideline for interested stakeholders
- to ICDE to define its own strategy in this field, including a proposal for an action programme for collaboration among its membership
- to contribute to the OER global movement from the perspective of independent (or autonomous) learning in a distance learning setting rather than teacher dependent learning in a face-to-face setting
- as a paper for presentation, consideration and discussion at the 2007 ICDE SCOP Meeting

2 Inquiry regarding OER among the ICDE membership

In the middle of October 2006 the ICDE members received an Inquiry on OER\(^1\).

The purpose was to get an overview on the issues at stake and the level of involvement of the ICDE membership in this movement.

A fair number of ICDE members (17\%) from different world regions responded to the inquiry.

The results showed that OER is a very actual theme for many institutions around the world.

To the question about their knowledge on the OER movement, 68\% was definitely Acquainted with the movement, while 32\% was not too familiar with it.

To the question on the institution’s involvement or planning to becoming involved in a Project on OER, 60\% was positive while 40\% was negative. Those involved in projects have also described them, and provided links to the relevant websites.

The major opportunities which one sees that OER could bring to open, flexible and distance learning institutions, can be summarized as follows:

- Easy access to quality content, reaching a wider audience
- Cost effectiveness: it can help distance learning providers to be more cost effective in
developing its learning materials and support

- Greater volume of learning resources available to all
- Quality learning materials can be obtained by nations and institutions with scarce financial resources to help solve capacity problems
- Flexibility: greater variety and diversity of learning resources will create more flexible learning opportunities
- Opportunities for sharing of available resources, increase opportunities for partnerships, for instance through a “Share-alike” protective clause in a Creative Commons licence.

The following major threats that OER could represent for open, flexible and distance learning institutions, have been mentioned:

- Copyrights, Intellectual Property Rights issues: there is a potential for copyright infringement of restricted works by OER authors
- Quality: OER without appropriate review processes can lead to low quality materials
- Cultural domination / Globalization: there is a potential risk for increasing the digital divide
- Lack of a viable new business model that may replace the old one
- Well known “brand” institutions may attract even more students
- “Not invented here” syndrome, academic preference to use their own materials
- Lack of initiative: less scope for research and innovations and uniform prescription of materials, less incentive to produce knowledge
- Content is not the same as learning materials.

Finally, 92% of those who answered the inquiry responded positive to the question about their interest in participating in ICDE activities in this topic. Further information about the inquiry results can be obtained from the ICDE Secretariat.

3 Outcomes of the 2006 kick-off meeting of the Task Force at UNESCO’s Headquarters in Paris

With UNESCO (Dr. Abdul Kahn) as host the kick-off meeting of the Task Force on November 12-13 in Paris proved to be a fruitful and necessary first interactive exercise around OER. Important input was given by all members of the TF.

More specifically there were three presentations, by:

- Fred Mulder (OUNL, TF Chair), ‘Bringing a global movement on OER in a new learner centered mode’
- Jan Hylen (OECD), ‘An overview of most important issues related to the further development of OER’
- Jos Rikers (OUNL, TF support), ‘ICDE TF OER Inquiry results’.

These presentations are accessible through the ICDE Secretariat, as is the case with a rather extensive report on the meeting.

Here we only present the ten major highlights from the discussions…

(1) The main message was that the OER movement should focus more on the Independent learner, on top of the ‘traditional’ emphasis on the distribution of digital classroom content. This implies:

- ‘Open’ is meant to contribute to better and easier access
- ‘Educational’ is to be read as directed towards leaning and in a student-centred
Approach

- ‘Resources’ is to be interpreted in a broad sense, and not only to support teachers but also to support learners.
This is a perspective that typically can be achieved by the ICDE membership and can be facilitated by ICDE in collaboration with UNESCO.

(2) In order to underline this somewhat other paradigm we might want to use the term Open Learning Resources (OLR) rather than OER. Furthermore it was raised that the OER definition is too vague. Does it refer to a course, an object, large pieces or small pieces? What degree of granularity is intended? Is it meant for teachers, or learners, or both? However, it was a rather general feeling that we should work with a concept that stays as broad and general as possible, keeping the word ‘Education’. What MIT offers is mainly content, not learning materials. This TF needs to develop the ICDE touch.

(3) ‘Open’ does not necessarily mean ‘free’. MIT puts the content online, but the learning experience is not free, neither the pedagogy. Materials can be free on the web, but he added value through services cannot. Were do we draw the line? ‘Open’ and ‘free’ are different concepts. The barriers must be low, OER must be easy to find, attractive, to provide people with easy access to get them into Higher Education. The concept is new: we do not know how this will develop.

(4) The concept is too abstract: what is the position of a given teacher or student in a given country, we need a bottom-up approach, more than a top-down approach. Developing countries do not want to see themselves only as users, but as producers of Materials as well.

(5) Some findings and preliminary conclusions of the OECD study, lead by Jan Hylen, on the map and scope of the OER movement:

- it is a global movement
- there is a growing number of initiatives and resources, but accurate figures are lacking
- there is a growing number of users, mainly in the categories of post-secondary instructors, students and the general public
- user data are poor, because of the easy access, most providers have no registration.
A basic observation is that there is a growing competition among Higher Education Institutions for funding and for students. Some institutions give the content away, others are keeping it tighter, what are the implications?

(6) With MIT, Tufts, and Johns Hopkins as sources, the OECD study gives the following characterization of the use and the users of OER:

- well-educated (bachelors or masters) self-learners, from North America
- often use it as supplement or complement for its flexibility and quality
- primarily in small chunks of learning.

(7) According to the OECD study the following motives may hold for institutions:

- altruistic reasons
- leverage on taxpayer money by allowing free sharing and reuse between institutions
- “you give it away and you receive it back improved”
- good PR show window that attracts students
with the growing competition new, attractive and distinguishing models are needed
stimulation of internal improvement, innovation and reuse.
Motives for individuals can be:

- altruistic reasons
- desire to stimulate innovation
- a wish to share with therefore creative and educational purposes
- publicity or reputation
- likely the open source movement in software (boost own ego).

(8) The OECD study refers to the following main challenges:

- Quality and relevance of resources
- IPR, copyright and licensing
- Sustainability
- Goals
- Organization: size, structure, degree
- Type of resources and media format for sharing.

As possible revenue models the OECD study mentions:

- Replacement models: OER replaces other costs (has a natural limit)
- Foundation-donation models (for starting up)
- Segmentation models, offering added value services to user segments
- Conversion models (commercial mode): give away a part, build the market and convert consumer to paying customer
- Voluntary support membership model
- Contributors-pay-model: contributors pay the costs, the provider makes it available for free.

(9) The OECD study identifies as technical issues:

- open source software and standards
- metadata harvesting
- security, privacy, long term presentation
- individual faculty and students using free services outside the university network
- who owns the information? what if a company that runs it, starts charging?
- Long term preservation of information and research data.

Moreover, the OECD study also addresses the question:
“What is new with OER?”

- Way of grass root involvement as producers and users
- Strength of allowing a multiple motivational system: altruistic and economic driven
- Open-up for new business models
- Brings web 2.0 to education
- Technological developments challenge HE institutions
- New wine in old bottles:“is it a way to hype up e-learning again?”

(10) Some comments on the OECD study …

- There is a problem of lack of stimuli and incentives: what do I get back? Without a reward system academics will not be willing to collaborate. In many developing countries teachers have a source of income when preparing students, we need a business model that convinces people to give away their materials.
- There was no mention of the language issue! There is cultural hegemony. English is too dominant. We must pay attention to cultural models of learning, and academic cultures. Barrier-free and open differs among the different cultural contexts.
An Information literacy course would be essential in order to be able to discern and evaluate the quality of the materials available.

A crucial issue is to motivate key decision-makers to make materials available. Only 1% of a university budget spent on open access press would be hugely transformative.

The Task Force should identify how a free system can be designed or built to hold the reference systems or templates together. How the systems can talk to each other. Now portal and repositories do not talk to each other. There are many access questions.

The format of delivery of OER is very important, bandwidth / access to technology issues, how to deliver in a particular context varies.

What is the specific ICDE flavour: what will be the branding, uniqueness of ICDE in OER? Maybe not to be addressed to individual learners alone. It might be institutional capacity building, or a learner-centred approach from an institutional point of view.

In Annex I you may find six additional observations from the Task Force kick-off meeting regarding:

- UNESCO’s collaboration with companies like Microsoft and Apple
- The popular use of SMS mobile technology in Asia
- a Canadian initiative at Athabasca University to establish an Open Access press for the creation of content that can be put on I-pods
- the new Open University of Brazil which is trying to establish an all-Portuguese language virtual community
- UNESCO-IIEP which has built a community to support awareness internationally
- Contradictory movements, for example caused by the US Patriot Act.

**IN SUMMARY**

**Regarding the Mandate of the TF…**

A. We should not address all kinds of general OER issues (that is being done by many others already), but rather concentrate on the self-study and learner-centred approach in OER materials, in other words the ICDE flavour in OER.

B. We can lend from a variety of rich sources: UNESCO, Hewlett Foundation, OECD, Open Courseware Consortium, EADTU, …

C. There is a need for a fundamental reflection of the OER definition within the context of the open and flexible learning model as applied – although in some variety – throughout the ICDE membership.

D. An extremely important issue is the business model, as is the cultural, linguistic, political and economic diversity.

E. We underline the primary question: “How can OER contribute to respond to the ‘Education for all’ UNESCO policy, capacity building, widening participation and access?” (emphasizing the developing countries context).

F. And the secondary question: “What role can be attributed to OER in developing or strengthening a knowledge-based society?” (emphasizing the developed countries context).

4 **ICDE flavoured review notions of the OECD OER Report**

The OECD study referred to in the previous Chapter resulted in a report which in its final draft version was sent to the Task Force members for reflection from a specific ICDE point of view. The review notions that we have received have been collected in Annex II in a compact presentation, ordered according to the chapters that were reviewed².
Note that after having sent the draft OECD OER Report to the TF members for reflection, the report was published in its definite form (on May 22) by the OECD under the title: ‘Giving Knowledge for Free: the Emergence of Open Educational Resources’.³

The reviewers agree in their opinion that the OECD OER Report shows excellence. It is a very relevant and readable report, that is to be recommended to all who are active in the OER area as well as to those who wish to get a better insight into the OER concept and the global OER movement. It has the characteristics of an overviewing report on the one hand and giving direction on how to tackle some of the major OER issues in an appropriate pragmatic way on the other hand. That indeed makes it attractive and very valuable for all OER interested individuals, organizations and governments around the world.

Nevertheless the TF has generated a series of notions and comments as well, supportive, questioning, or critical. The most relevant ones are summarized below, one-to-one matching the order in Annex II, which contains more detail.

**IN SUMMARY**

*the most relevant review notions are…*

A. Besides the four forces for change with high impact on Higher Education (HE) that are mentioned: globalization, demography, governance and technology we might identify an important fifth force for change, a fifth challenge in HE, that is the need for substantial upscaling the total population in HE. The present mainstream campus-based HE cannot cope with such (large) demands. OER and the model of open and flexible learning offer relevant solutions in this respect.

B. LifeLong Learning does not receive much attention. The natural bridging between informal, non-formal and formal learning by OER and the paramount opportunities this offers to widening and increasing participation in HE, however, make OER probably a most powerful instrument in the area of LifeLong Learning(LLL).

C. Public funding is being referred to in the report. Thinking of knowledge as a public good, indeed giving it for free, and the supposed responsibility of governments for access, quality and efficiency of HE (and education in general), would justify a ‘good’ debate on the funding role of governments.

D. In the LLL perspective the freely available content on the Internet should empower learners to really study on their own in an open and flexible learning environment, with no (avoidable) references to a teacher, a classroom or an educational institution. This requires structural and explicit learner-centred content design instead of the conventional teacher-centred content approach.

E. One might question whether for Openness the ‘no cost attribute is most fundamental, or that it actually is a complex of mechanisms that away all kinds of traditional existing barriers: institutional registration, required diplomas / certificates, on-campus classes and face-to –face meetings, fixed schedules, rigid Pacing, over-specified programmes, too big programme components, etcetera. Here actually the characteristic Openness of the Open and Distance Learning (ODL) Universities is stake: in its broadest interpretation open as to access, places, scheduling, pacing, and combining courses, as
well as open to people, methods and ideas. Linking this Openness with OER, could make ODL Universities important players in the OER movement.

F. Many OER users seem to be well-education learners. This is not surprising since the OER materials generally are not designed for self-study and that’s why a high level of education is required in order to be able to learn without additional guidance or support. This means that the potential of OER is heavily underexploited. The report refers to the three European OER initiatives from ODL Universities mentioned earlier (UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL). These OER activities can be considered as a new generation (‘second wave’) in the OER development, since their learning materials are explicitly designed for self-study. This significantly lowers the barriers to self-learners as compared to providing classroom learning materials. If we take UNESCO’s goal ‘Education for All’ seriously, this is extremely important, also in connection with the earlier remarks on up scaling, LLL and informal learning.

G. Open courseware should take into account the IP and copyright heritage of other cultures, particularly China. It should be realized that open courseware could be a one-sided exercise. If there are more ‘takers’ than ‘contributors’ to open courseware will the world be richer? If Euro-American centric institutions dominate the contributions – as is likely – what will be the international outcome?

H. The ultimate openness of OER leads to a large flexibility in the process of continuous and interactive development and implementation anywhere, anytime, by anybody. The OER contributors share the willingness to devote their time to work on OER activities, and enjoy the input and feedback from others wherever and whenever. However, once the euphoria of being an OER developer subsides, maintaining the OER materials updated at high quality might be very difficult.

I. The report fails to provide concrete sound economic models for OER. HE institutions do have various options, however, to possibly find considerable revenues, not from their content, but rather from credentialing, from examination processes, and from personal support to learners.

J. In regions and areas where ICT possibilities are scarce there is a danger that ‘the (prospective) users are left behind’. So, a prerequisite for a successful OER movement is easier and better access to ICT facilities, which implies that should have a high priority in any OER action plan.

K. In many countries, where English is not widely spoken, it will be close to impossible to effectively join the international OER community. A way-out is OER initiatives in different (working) languages. This practice is encouraging and necessary. Nevertheless, what remains is the language barrier to a full sharing of experiences and lessons learned with colleagues from different parts of the world.

L. Generally translating is not enough since the conversion of the learning materials should also include adaptation to a different social-cultural context. For this so-called ‘localization’ process automation is no option, which implies ‘hard labour’.

M. OER is warmly welcomed by the developing countries, because this will provide access for students and institutions to learning resources, which previously were restricted to specific institutional use only. ODL Universities can benefit from OER materials in being able then to reduce the costs for developing their learning materials. There also exist, however, serious barriers for the use of OER in developing countries: (i) the low degree of access to ICT facilities...
and the corresponding high costs, and (ii) the social and cultural context for the learners and the society in which they live, which may be very different from the environment where the materials have been developed. Localization is absolutely necessary.

N. The Quality Assurance (QA) issue is addressed in the report but its extreme importance cannot be overestimated. The ODL Universities could contribute to this easily by labeling their OER materials with their reputations and brand names (as is suggested in the report). In Europe the EADTU has run a QA project, called Excellence, addressing the quality of e-learning along various aspects. The outcomes have been generally applauded, are very practical for direct operational use, and might be valuable for the QA of OER.

5. Outcomes of the 2007 ICDE SCOP Meeting at OUNL

The SCOP Meeting at OUNL with its theme ‘Open Educational Resources as an instrument for achieving Education for All’ was an important event for the Task Force. One could say that the SCOP Meeting was acting temporarily as an extension of the TF, developing feedback, critically reflecting, generating ideas, setting priorities, and giving direction to the OER future for ICDE and its membership…

The SCOP Meeting is an exclusive meeting for the leadership of the ICDE member institutions (Vice-Chancellors, Rectors, Presidents, Directors, Principals). SCOP 2007 was attended by about 60 participants (of whom ten TF members) from 22 countries whereby all the continents around the world were represented.

The programme of the SCOP Meeting (see Annex III) shows a mix of plenary sessions with a variety of expert speakers from academia, research, government, industry, ODL University OER initiatives, UNESCO and OECD, and a series of highly interactive thematic workshops. The Dutch Minister of Education, Culture and Science was present at the opening session, thereby underlining the importance of the overall theme for the maturing Dutch knowledge-based society. The TF Chair presented the TF Interim Report as substantial preparatory work fit to SCOP 2007.

The three thematic workshops turned out to be very fruitful and effective. The participants were split in groups based on their regional (continental) origine: one Asian group, one European group and one group for the other continents. In the first workshop on ‘What is OER for the ICDE membership?’ the discussion focused around the question what in OER is typical for ODL institutions (the ICDE membership) and what issues might be of a more general nature, for all institutions in (higher) education to consider, or for national authorities to deal with.

The second workshop on ‘Policies, impact conditions and implementation for the ICDE membership’ addressed the question what ICDE can and has to contribute to the worldwide OER movement and in service to its members. Because the participants were grouped according to their regional origine, it was easy to record the large diversity in topics that were put forward. As a basis a survey by UNESCO, identifying relevant topics when dealing with OER, was used. The topics were discussed and prioritized. Copyright issues, awareness raising and promotion, financial issues, quality assurance, learning support services, and assessment of learning were all topics scoring high amongst the participants, but in different orders of priority depending on the continental origin. This workshop resulted in a recommendation to ICDE to establish a clearinghouse or support
centre for the membership. In this support centre information on the different topics could be provided. At the same time this support centre could track the progress of OER, the progress within member institutions and share this information amongst the membership. ICDE could also set up an online training programme for faculty and contribute to the clarification of standards on the metadata level in developing OER materials.

Workshop number three on ‘Sustainability of the OER approach for the ICDE membership’ touched the fundamental discussion on the business model of the institutions. If content is no longer the unique selling point, what is it then that institutions should marker? Or does OER mean that institutions as we know them today are obsolete? The discussion was strongly related to the discussion in workshop number one, where an ICDE shaped definition of OER was considered. Depending on that definition, how ‘open’ is OER in the context of higher education and does ‘open’ necessarily mean ‘for free’?

The conclusion from this workshop was that there is not one definition of OER nor is there a single model for sustainability. There is a strong dependency on the local situation. The workshop results indicated a clear link between governments ambitions to increase participation rates in higher education and the need to redefine sustainability of OER provided by publicly funded institutions. This does not automatically mean that all learning with OER should be for free for the learner. It was concluded that ‘open’ is not equivalent to ‘for free’ for all components of the OER-based learning process. Again this workshop advised ICDE to establish a support facility for information exchange, learning from best practices and stimulating collaboration. A warning was issued not to replicate what other consortia already do.

With the TF Interim Report as input, the broad spectrum of relevant outcomes of the thematic workshops, the deep scholarly views from the variety of plenary speakers, and the engagement of all participants it was not difficult to close the SCOP Meeting with a proper and distinct set of conclusions and recommendations. The Task Force had a meeting next to SCOP 2007 in Heerlen, reviewed and virtually adopted the SCOP 2007 conclusions and recommendations, and added to then a minor extension in terms of some further actions to be planned by ICDE. The merger of the TF reviewed SCOP 2007 conclusions and recommendations and the TF extension will be presented in Chapter 7.

6. Further developments after ICDE SCOP 2007

We are witnessing a solid expansion of the global OER movement.

- There is an ever increasing number of initiatives worldwide, not only in Higher Education but also in Secondary Education, varying from top-ranked universities to regional colleges, from institutional consortia to individual actions, in a broad spectrum of disciplines.
- The UNESCO OER Community is active as ever, after intensive earlier forums run by UNESCO’s International Institute for Education Planning (IIEP).
- The Open Courseware Consortium run by MIT shows a substantially growing membership from a wide variety of institute in different countries around the world.
- The William and Flora Hewlett Foundation has been very instrumental by financing many OER projects, starting with MIT in 2001, and still is a crucial player in boosting the OER movement both with financial support and through their extensive network of expertise and advice.

The recent developments in Europe are of particular interest within the context of this TF Report dealing as it is with OER for open and flexible learning in general and OER related to ODL Universities more specifically. The projects OpenLearn from UK OU and OpenER from OUNL,
both started in 2006, have come to the stage that both front running universities UK OU and OUNL must soon resolve their strategic dilemma regarding a full conversion to OER. The other eight ODL Universities in the EADTU/MORIL project are all developing their own OER strategy or implementing their own OER policy. Of these the Turkish ODL University Anadolu is the ‘champion’ with the announcement in 2008 (at its 50th anniversary) of a comprehensive OER strategy.

An interesting new EADTU initiative, partly financed by a Hewlett Foundation supplementary grant, is to organize an OER Seminar Series. This series consists of three OER Seminars. The OER Strategy Implementation Seminar has already taken place in May 2008 at UK OU, and was mainly targeting the European ODL Universities. Products of this first seminar in the series are available. Integral cases by UK OU (OpenLearn) and OUNL (OpenER) have been presented and discussed, dealing with such issues as strategy, sustainability, technology, IP, curriculum, academic, participation, quality, and organizational structures. In addition, a participants’ confrontation was set up with various institutional approaches of ODL Universities.

The OER Strategy Development Seminar is particularly meant for regular universities and associations of those universities, providing the sharing of knowledge and experiences resulting from the EADTU/MORIL initiative. K.U. Leuven is the host and the dates are October 28 and 29, 2008 (see Annex IV for the programme).

The OER Capacity Building Seminar, which is to set the stage for OER capacity building on various continents, will start with raising awareness and gathering different points of view, strategies and priorities on OER. This seminar will be organized in close interaction with UNESCO and is scheduled for January 2009 (dates still to be fixed) at UNESCO’s Headquarters in Paris.

Finally, in this chapter on further developments after ICDE SCOP 2007 it is worthwhile to note that:

- recently UNESCO has published an interesting document ‘OER: the Way Forward’, which is the fruit of the community’s collective reflection on how to advance the OER movement: it’s about the key issues, priorities, lead stakeholders, and what to do
- one of the TF members, Fred Litto, gave a presentation on the work of the ICDE OER Task Force at the Fifth Pan-Commonwealth Forum on Open Learning (PCF5) in July 2008 in London; this was in an inspiring and well attended session dedicated to OER including other presentations by UNESCO (Susan D’Antoni ), Hewlett Foundation (Marshall Smith, Catherine Casserly ), and Vijay Kumar from MIT on the National Knowledge Commission (NKC) in India
- of course OER will be discussed, evaluated, and advanced as one of the major themes in the upcoming 2009 ICDE/EADTU World Conference on 7-10 June in Maastricht, The Netherlands (labeled as the M-2009 Conference).

7 Conclusions & Recommendations

As indicated in Chapter 5 here the merger will be presented of the SCOP 2007 conclusions and recommendations (as reviewed and virtually adopted by the TF) and the TF extension towards some further actions to be undertaken by ICDE.

The ten major conclusions in this Final TF Report are:

1. The primary question is: ‘How can OER contribute in responding to the ‘Education for all’ UNESCO policy, and to capacity building as well as widening participation & access?’
2. The secondary question is: ‘What role can be attributed to OER in developing or strengthening a knowledge-based society?’

3. Connecting the ODL universities characteristics to the OER concept promises to offer a most powerful line of action in society regarding both (primary and secondary) question.

4. ‘Open’ is not equal to ‘free’.

5. Keep OER away from a fundamentalist approach or a dogmatic view.

6. Diversity is crucial when considering the OER potential and opportunities regarding e.g. target groups, goals & ambitions, states of development, national systems, scale & scope, content share, etcetera.

7. Because of this diversity international prioritization is difficult and should be brought back to institutional and at most national level.

8. ‘Knowledge is a public good’—as stated—requires public funding.

9. Sustainability is not for granted and depends on a change in funding schemes (change in weights of components or additional money).

10. It is necessary to explore the potential and added value of public-private interactions, collaborations, and partnerships.

The eight main recommendations in this Final TF Report are that…

ICDE (and its membership) should:

A. Not address general OER issues (that is being done by many others already), but rather concentrate on the self-study and learner-centred approach in OER materials (the ODL flavour in OER as related to the profiles of the ICDE membership)

B. Make a deeper analysis of the diversity regarding OER, the underlying assumptions or grounds and the required variety in actions (e.g. collaboration between ICDE and UNESCO)

C. Develop practical reports or handbooks that relate OER to ODL regarding themes like OER implementation, Quality Assurance, sustainability, adaptation to language / culture, content & services, IPR / copyright, all of this based on case studies that can be made available (e.g. from frontrunners in Europe, from EADTU and other regional associations)

D. Exploit the ICDE website as a forum for information exchange and discussion, establish a support centre for the ICDE membership and other mechanisms in order to exchange strategies, policies, best practices, and expertise, as well as to stimulate collaboration

E. Contribute to awareness raising and mobilize political resonance as well as media exposure using ICDE as a brand

F. Make a list of possible concerns (from faculty, students, institutions points of view) that can be expected and formulate responses

G. Develop further collaboration with regional/continental ODL associations (EADTU, AIESAN, AAOU, ACDE, USDLA, ABED, etc.) and other international organizations (UNESCO, OECD, Hewlett Foundation, Open Courseware Consortium, Commonwealth of Learning / COL, SEAMEO, etc.)

H. Start OER Summer Institutes in order to prepare faculty, one per region/continent in co-operation with the appropriate ODL associations and with selected member institutions taking the lead; attendance by members of ICDE (at a discount) as well as non-members.

Recommendation (H) regarding the OER Summer Institutes has a natural link with the EADTU Initiative, financed by the Hewlett Foundation, to start an OER Seminar Series in 2008, as discussed in the previous Chapter. The last of the three EADTU OER Seminars is a capacity building seminar for the leadership at ODL Universities outside of Europe in order to reach out to the other continents. It will be held at UNESCO’s Headquarters in Paris (where we started the ICDE TF work) in the beginning of 2009 and may be considered to offer an exploratory platform (or prototype) for subsequent regional/continental OER Seminars (or Summer Institutes). It would be wise to join forces between ICDE, EATU and other ODL associations in...
Finally, the Task Force recommends to the ICDE Executive Committee to discharge the TF from its duties, to dissolve the TF, and to install a new Task Force with experts from ICDE members that can work on the recommendations provided in this report. The mandate of such a newly formed Task Force should be in agreement with the ICDE Executive Committee.

With respect to this Final Report the Task Force advises the ICDE Executive Committee to publish an appealing public version and to organize political resonance and media exposure around it. In as many countries as possible-through the intervention of ICDE members-this public report should be made available to the press and be disseminated to the relevant stakeholders.

8 Epilogue: does India show the way?

India has a high-level advisory body to the Prime Minister, the so-called National Knowledge Commission (NKC). NKC operates since October 2005 and has published two (annual) Reports to the Nation. The follow-up to the reports has shown-according to NKC-laudable support from the government in terms of adopting its recommendations and providing appropriate funding as well. The NKC Agenda places high priority on education as a central instrument for achieving rapid and inclusive growth with specific emphasis on expansion, excellence and equity.

‘Report to the Nation 2007’ reviews the (earlier)2006 recommendations and specifies the (new) 2007 recommendations.11 This 2007 set of recommendations covers a wide range of areas: Health information Network, Portals, Legal Education, Medical Education, Management Education, Intellectual Property Rights, Innovation, Traditional Health Systems, and Legal Framework for Public Funded Research, plus two areas that are specifically relevant for this Task Force Report: open and Distance Education (ODE) and open educational resources (ODR).

On page 17 of the report NKC states that ‘distance education can provide access to education for a large number of students, including for learners with special need. With the proliferation of media like television, radio and internet, its reach can be significantly increased. NKC recommendations on distance education focus on creating a national ICT infrastructure, developing web-based common open resources, establishing a credit bank and providing a national testing service.’

And on pages 51-52 the NKC report addresses open educational resources. Below we include three interesting quotes…

‘Our success in the knowledge economy hinges to a large extent on upgrading the quality of, and enhancing the access to, education. One of the most effective ways of achieving this would be to stimulate the development and dissemination of quality open access (OA) materials and open educational resources (OER) through broadband internet connectivity. This would facilitate easy and widespread access to high quality educational resources and drastically improve the teaching paradigm for all our students.’

‘A set of key institutions should be selected and experts representing diverse knowledge areas like agriculture, engineering, medicine, arts, humanities, science, education, etcetera should be asked to develop standards-based content, which can be customized to diverse user needs. This should be made available not only to Indian institutions but also for global use.’
The content in the repositories should be multimedia, interactive and available in different regional languages. These projects should cover a wide range of subjects mentioned above. To speed up the creation, adaptation, and utilization of OER, it is necessary to launch a ‘National E-content and Curriculum Initiative’.
国际开放与远程教育理事会（ICDE）
开放教育资源（OER）全球特别工作组总结报告
起草人：Fred Mulder (工作组主席)、Jos Rikers (工作组支持)

0 引言

2001年，麻省理工学院（MIT）发起了它的开放课程（OpenCourseWare）创举，自那以后，现在被称为“开放教育资源”的运动在世界范围内传播开来。在开放、灵活和远程学习领域，若干意义重大的举措正在进行之中，例如：在欧洲有英国开放大学的“开放学习”、荷兰开放大学（OUNL）的“开放教育资源”以及远程教育大学欧洲协会（EADTU）和其成员的“独立学习多语开放资源（MORIL）”等从一开始就对这种发展产生了兴趣。开放教育资源对于发展中国家来说有着特殊的现实意义。与开放、灵活和远程学习相结合的开放教育资源对“方便、更好地接受教育”甚至贡献更大。

国际开放与远程教育理事会决定成立一个国际开放与远程教育理事会开放教育资源全球特别工作组，这一决定基于对这一运动重要性的认识，并在2006年6月在利勒哈默尔举行的国际开放与远程教育理事会大学校长常设会议讨论的基础上作出的，讨论是在国际开放与远程教育理事会和联合国教科文组织（UNESCO）之间展开的，这一特别工作组包括来自不同的大陆、文化和教育途径的成员。这个新的特别工作组是在2006年9月在里约热内卢召开的第22次国际开放与远程教育理事会世界会议过程中宣布的。为显示对这一举措的支持，联合国教科文组织（UNESCO）邀集了该特别工作组在2006年9月在巴黎的联合国教科文组织（UNESCO）总部召开开幕会议。

2007年6月，由荷兰开放大学（OUNL）主办的国际开放与远程教育理事会大学校长常设会议在海尔伦召开，这次国际开放与远程教育理事会大学校长常设会议是完全专用于开放教育资源的，会议是以“开放教育资源作为建立面向所有人的教育的手段”为主题的。这次大学校长常设会议对于推进特别
工作组的工作有很大帮助，特别工作组的工作是以提交给 2007 年度大学校长常设会议的临时报告为基础的，报告由特别工作组主席起草。报告对于在大学校长常设会议参与者中间进一步推动关于开放教育资源的思考也是有帮助的，不仅是从开放教育资源作为一个具有创新性和挑战性的观念来思考，同时也是从开放教育资源战略和执行脚本上思考。紧接着海尔伦大学校长常设会议之后，特别工作组举行会议，标出了大学校长常设会议的主要结论和建议，并且在如何推进工作上达成一致。通过递交总结报告给 2008 年 10 月在上海由上海电视大学主办的国际开放与远程教育理事会大学校长常设会议，并由国际开放与远程教育理事会接受之后，特别工作组完成了它的使命。

这份总结报告包括以下章节：

1. 特别工作组的范围和组成
2. 在国际开放与远程教育理事会成员中关于开放教育资源的调查结果
3. 在巴黎联合国教科文组织（UNESCO）总部召开的 2006 年特别工作组开幕会议的成果
4. 关于开放教育资源的经合组织（OECD）报告中具有国际开放与远程教育理事会特色的一系列概念
5. 2007 年荷兰开放大学（OUNL）国际开放与远程教育理事会大学校长常设会议的成果
6. 国际开放与远程教育理事会 2007 年大学校长常设会议后的新进展
7. 结论和建议
8. 结束语：印度找到了开放教育资源的途径了吗

1 特别工作组的范围和组成

国际开放与远程教育理事会开放教育资源全球特别工作组通过其成员与世界各个地区相连接，与其他开放教育资源的举措相连接，它包括一名来自联合国教科文组织（UNESCO）的代表。

特别工作组有下列成员：
弗雷德•穆尔德 (Fred Mulder) (主席)，校长，荷兰开放大学，荷兰
（也是荷兰海尔伦 2007 年国际开放与远程教育理事会大学校长常设会议 会议主席，荷兰马斯特里赫特 2009 年 ICDE/EATU 世界会议主席和 EADTU/MORIL 特别工作组主席）

尼克•阿伦(Nick Allen)，教务长，美国马里兰大学学院，美国

苏珊•安东尼(Susan d'Antoni)，计划专家，国际教育规划研究所，教科文组织

斯图尔特•汉密尔顿(Stuart Hamilton)，首席执行官，澳大利亚开放大学，澳大利亚

赫尔穆特•霍耶(Helmut Hoyer)，校长，远程教育大学 (FernUniversität)，德国（也是 2007 年底以前代理国际开放与远程教育理事会主席）

萨莉•约翰斯通 (Sally Johnstone)，副校长，学者，薇诺娜州立大学，美国

弗雷德里克•M•里特(Fredric M. Litto) ABED 主席，巴西

贝尔纳•卢(Bernard Loing)，国际开放与远程教育理事会常驻联合国教科文组织代表，法国

弗里茨•派耐克(Frits Pannekoek) Pannekoek，校长，阿萨巴斯卡大学，加拿大

保立那•派能(Paulina Pannen)，主任，东南亚区域开放学习中心，印度尼西亚

巴尼•皮蒂亚纳(Barney Pityana)，副校长，南非大学，南非（也是 2008 年 1 月国际开放与远程教育理事会执行委员会成员，原 ACDE 主席）

雷达•罗尔(Reidar Roll)，国际开放与远程教育理事会秘书长

塔里克•肖克伊(Tarek Shawki)，主任，信息社会与教育 ICT 部门，联合国教科文组织

埃特维•苏普曼(Atwi Suparman)，校长，特巴克大学(Universitas Terbuka)，印度尼西亚

大卫•文森特(David Vincent)，代理副校长，战略规划和对外事务，开放大学，英国（也是 EADTU 主席）

另外，特别工作组受到下列人员支持：

乔斯•利克斯(Jos Rikers)，国际关系高级官员，荷兰开放大学 (OUNL)（也是 2007 年荷
兰海尔伦国际开放与远程教育理事会组委会主席和荷兰马斯特里赫特 2009 年 ICDE/EATU 世界会议组委会主席

安娜・帕罗那 (Ana Perona)，助理秘书长，国际开放与远程教育理事会秘书处（2007 年部分：代理秘书长）

妮娜・巴格雷 (Nina Bagley)，信息和成员服务主任，国际开放与远程教育理事会秘书处

特别工作组的授权是形成一个关于开放教育资源的报告。这个报告的目的地促进全球开放教育资源运动，增加国际开放与远程教育理事会特有的特色和价值，这种增加是通过采用自我和远程学习的方法而不是目前主流的班级授课的方法。

报告将处理各种事项，包括:

- 可用性/通道
- 知识产权
- 内容的国际化和本土化（指语言和文化）
- 学习社会的支持
- 质量控制
- 筹措资金和可持续商业模式
- 与适当程度学习的交接
- 在非正式、无形式和正式学习之间架设桥梁的可能性
- 目标组内的多样性
- 与已存在供应机构、各种选择、误用、供应机构的获益有关的经验/好的做法
- 发展中国家使用开放教育资源的潜力
- 公共和私有部门的角色改变
- 与小组有关的其他议题
特别工作组将产生一个报告，与其他方面一起服务于：

- 高等教育/开放和远程学习机构，当它们在决定是否作为一个提供者或接收者来介绍（或不介绍）活动的时候
- 作为概念的推进基础
- 作为有兴趣的利益相关者的指导方针
- 国际开放与远程教育理事会对自己在这一领域内的战略界定，包括成员间合作行动计划的建议
- 从一个独立（自主）学习的视角为全球运动做出贡献，这种学习是基于远程学习而不是面对面教学
- 作为2007年国际开放与远程教育理事会呈现、考虑和讨论的文本

2 国际开放与远程教育理事会成员间关于的调查

在2006年10月中旬，国际开放与远程教育理事会成员收到一份关于的调查1。

目的是获得有关生死攸关议题和在这场运动中国际开放与远程教育理事会成员参与程度的概况。

相当一部分来自世界各地的成员（17%）对调查作出回应。结果表明对于世界范围内许多机构来说是一个实际的主题。

对于他们有关运动知识的问题，68%确定知晓这个运动，然而有32%对它不是太熟悉。

作出回应的机构的地理分布

1 这个调查为乔斯•利克斯（Jos Rikers）（荷兰开放大学）起草，由ICDE秘书处处理
对于机构涉及或者参与有关项目的问题，60%是肯定的，而40%是否定的。项目参与者对此也有描述，并且提供了到相关网站的链接。

可能带给开放、灵活和远程学习机构的主要机遇，可以总结为：

- 使更多人能够便捷地获得优质的leaning材料
- 成本效益：它可帮助远程学习提供者在开发学习资源和提供支持服务方面的成本更有效
- 更多的面向所有人的学习资源
- 国家和机构能以较少的财政资源获得优质学习材料，以促进他们的能力建设
- 灵活性：学习资源的更加多样化将创造更多的灵活学习的机会
- 例如可通过创作共享（Creative Commons）许可中的“相同共享”（"Share-alike"）条款类似的方式，有机会分享可能的资源，增加成为伙伴关系的机会，

开放教育资源（）可能给开放、灵活和远程教育机构带来如下主要危险：

- 版权、知识产权问题：对作者的限制性作品潜在的版权侵害
- 质量：没有合适审查程序的可能导致低质量的资源
- 文化控制/全球化：潜在地增加了在数字形式上划分的风险
- 缺少切实可行的新商业模式来替代旧的模式
著名“品牌”机构可能吸引更多的学生

“非本地发明”综合症，使用他们自己材料的学术偏好

缺少创造性：研究和创新和对材料的统一规定的较小范围，对知识生产激励较少

内容与学习材料不同

最后，调查中在回答关于他们参与国际开放与远程教育理事会活动的兴趣时，有 92% 的人是肯定的。

关于调查结果的更多信息可从国际开放与远程教育理事会秘书处获得。

3 2006 年在巴黎联合国教科文组织 (UNESCO) 总部召开的特别工作组开始会议的成果

在巴黎 11 月 12-13 日召开的特别工作组开始会议由 UNESCO (Dr. Abdul Kahn) 为东道主，这是第一次围绕的富有成效的、必要的互动行为。所有特别工作组成员都给出了重要输入。

尤其特别地是以下人员作的三个报告：

弗雷德•穆尔德 (Fred Mulder) (OUNL, 工作组主席), 《以新的学习者中心模式带来全球运动》

( Bringing a global movement on in a new learner centered mode)

简•海伦 (Jan Hylen) (OECD), 《关于进一步发展的最重要问题的概览》 (An overview of most important issues related to the further development of)

乔斯•利克斯 (Jos Rikers) (OUNL, 工作组支持), 《国际开放与远程教育理事会 TF 调查结果》

(国际开放与远程教育理事会 TF Inquiry results)

这些报告可从国际开放与远程教育理事会秘书处获得，也可获得其他大量关于会议的报告。

这里仅呈现来自会议的十大亮点：

(1) 主要信息是，运动应更关注独立学习者，在强调数字班级内容分布的“传统”之上。这表明：“
"开放"意在有助于更好、更容易的获得

"教育"被作为是直接指向学习的，并且是以学生为中心的方式

"资源"被作为广义的解释，不仅仅为了支持教师，也是支持学习者

这是国际开放与远程教育理事会成员已经形成的一个典型视角，而且能受到国际开放与远程教育理事会与 UNESCO 的协作支持。

（2）为了标明在某种程度上不同的样式，我们本想用开放学习资源 (OLR) 一词而不是，另外，有人提出的定义太模糊，它是指一个过程，一个目标，大块还是小块？想要什么程度的间隔？它意思是为了教师还是学生者，或者是两者？然而，有一种相当普遍的感觉，那就是要有一个尽可能宽阔和普遍的概念，因而保留了"教育"一词。MIT 提供的主要是内容，不是学习材料。本特别工作组需要发展国际开放与远程教育理事会的触觉。

（3）"开放"并不意味着"免费"。MIT 把内容放在网上，但学习的经验不是免费的，教学也不是。网站上的材料可能是免费的，但通过服务加入的价值不可能是。我们如何划出一条线？"开放"和"免费"是不同的概念。门槛一定要低，一定要易于找到，有吸引力，为人们提供进入高等教育的便利途径。概念是新的：我们不知道事情将会怎样发展。

（4）概念太抽象。对于某一国家的某一教师或学生来说，其位置在哪里？我们需要一个由下向上的方法，不是由上而下的方法。发展中国家不想看见他们仅仅作为使用者，而是同样作为生产者。

（5）简•海伦 (Jan Hylen) 领导了一次于运动地图与范围的 OECD 研究，有一些发现与初步结论：

这是一个全球性运动

举措与资源的数量在增加，但缺少精确数据

使用者数量在增加，主要是中等教育以上教师、学生和公众

使用者数据缺乏，因为容易进入，大部分供应者没有注册
一种基本观察认为在高等教育机构之间对资金和生源的竞争正在加剧。有些机构拿出了学习材料，另一些机构却把内容捂得更紧，这表明什么？

（6）以麻省理工学院（MIT）、约翰霍普金斯大学（Johns Hopkins）、塔夫茨大学（Tufts）为来
源，OECD 研究给出了使用情况和使用者情况的特点：

- 受良好教育（学士或硕士）的自学者，来自北美
- 因为它的灵活性和高质量，经常用它来作为补充
- 主要以小块学习为主

（7）根据 OECD 的研究，机构可能持有下列动机：

- 利他性原因
- 通过允许机构间的免费分享和再利用来影响纳税人的钱
- “你拿出去，收回时会有改进”
- 良好的公共关系是吸引学生的窗口
- 随着竞争的不断加剧，需要新的、有吸引力的、有特色的模式
- 刺激内部改进、创新和再利用

个人动机可能是：

- 利他性原因
- 渴望刺激创新
- 希望用创造性和教育性目的进行分享
- 宣传或声誉
- 可能是软件里的开放资源活动（提升自我）

（8）OECD 研究指出下列主要挑战：

- 资源的质量和相关性
作为可能的收益模式，OECD 研究提出：

- 取代模式：取代其他费用（有天然的限制）
- 资金捐赠模式：用于起动
- 分割模式，为使用环节提供附加的价值服务
- 转化模式（商业模式）：拿出一部分来建立市场并把消费者转化为付费顾客
- 志愿者支持模式
- 捐助人付款模式：捐助人付费，提供者让别人免费使用

(9) OECD 研究认为的技术问题：

- 开放资源软件和标准
- 元数据收集
- 安全、隐私，并长期提供
- 个别教职工和学生在校园网络外使用免费服务
- 谁拥有信息？如果一个经营这些信息，怎么收费呢？
- 信息和研究数据的长期提供

另外，OECD 研究也提出下列问题：

“新在什么地方？”

- 以草根参与的方式来做生产者和使用者
多种动力系统的力量：利他性和经济驱动

向新的商业模式开放

把新的互联网模式（web2.0）引入教育

技术的发展挑战高等教育机构

旧瓶装新酒：这是再次大肆宣传电子学习的办法吗？

（10）关于OECD研究的一些评论：

- 缺少激励与推动力的问题：我拿回了什么？没有回报系统，学者们将不愿意合作。在许多发展中国家，教师在准备学生时是有收入的，我们需要一个能说服人们拿出他们的材料的商业模式。

- 没有提到语言问题！有一个文化势力范围的问题。英语的控制力过于强大。我们一定要注意学习的文化模式和学术文化。无门槛和开放在不同文化情境中是有区别的。

- 为了能够区别和评价可用材料的质量，“信息素养课程”将会是必需的。

- 关键问题是推动关键的决策者来使材料变得具有可用性。仅仅1%的大学财政预算花费在“开放存取”出版社上的状况要根本改变。

- 特别工作组应当怎样设计或建立一个免费系统，来把各参照系统或模板结合起来。各系统怎么样相互对话。现在“港口”和“仓库”互不交流，还有很多的通道问题。

- 的发送格式是非常重要的，获得技术的带宽/通道成为问题，怎样在特殊情境下发送也会不断变化。

- 国际开放与远程教育理事会的特别特色是什么：国际开放与远程教育理事会在方面品牌和独特性将会是什么？或许没有必要单独对个别学习者去陈述。它可能是习以为常能力建设，或者从习以为常的观点来看，是一个学习者中心的方法。

六条来自特别工作组启动会议上所关注的言论：

Open Praxis Volume 3, Issue 1, March 2009
Page 135
● UNESCO 与微软和苹果之类的一些公司合作

● SMS 移动电话在亚洲的普遍使用

● 加拿大在阿萨巴斯卡大学的一个尝试, 即建立一个“开放存取”出版社, 以创造能放在 i-pod 上的内容

● 试图建立一个全葡萄牙语的虚拟社区性质的新巴西开放大学

● 联合国教科文组织国际教育规划研究所 (UNESCO-IIEP) 已建立一个社区来支持国际意识

● 相矛盾的运动，如美国“爱国者法案”所导致的。

总结

关于特别工作组的授权……

A. 我们不应指出所有一般的话题 (已经有很多人在研究了), 但是在材料中, 要集中于自我学习和学习者中心的方法, 换句话说, 形成方面的国际开放与远程教育理事会特色。

B. 我们能借助各种丰富资源: UNECO、休利特基金会 (Hewlett Foundation)、OECD、开放课程联合会 (Open Courseware Consortium)、远程教育大学欧洲协会 (EADTU) 等。

C. 在国际开放与远程教育理事会成员间广泛应用的开放灵活学习情境中, 有必要对定义作出基本的回应——虽然这种情境有各种样式。

D. 一个极其重要的问题是商业模式, 文化、语言、政治和经济的多样性也是如此。

E. 我们标出首要问题：“怎样致力于回应‘为了所有人的教育’的 UNESCO 政策、能力建设、拓宽参与和获取途径?” (强调发展中国家的背景)。

F. 第二个问题是：“在建设或者完善知识社会中，以什么角色来为做出贡献？”(强调发达国家情境)。

4 国际开放与远程教育理事会对经济合作与发展组织开放教育资源 (OECD) 报告观点的评审
在前面章节所指的 OECD 研究形成了一个报告，是最终草案，送交特别工作组成员获取来自国际开放与远程教育理事会视角的反馈。

把 OECD 草案报告送交特别工作组成员反馈之后，以确定形式由 OECD 出版了（5月22日），标题是“免费送知识：开放教育资源的紧迫性（Giving Knowledge for Free: the Emergence of Open Educational Resources）”。

在检查人员的观点中，他们同意 OECD 报告是优秀的。这是一非常相关并且可读的报告，并将被推荐给那些希望对概念和全球运动有较深了解的人，同样也推荐给所有活跃于领域内的人。一方面，它有概括性报告的特点；另一方面，它以适当、实用的方式给出了如何处理主要问题的方向。它确实对世界范围内所有对感兴趣的个人、组织和政府具有价值和吸引力。

然而，特别工作组同样产生了一系列看法和评论，有支持的、质疑的或者批评的，最相关的一些总结在下面。

**总结**

最相关的检查看法是……

A． 有四个变化力量对高等教育有高度影响，它们是全球化、人口统计学、统治方式和技术，除此之外，我们可以发现第五个重要变化力量，也是第五个对高等教育的挑战，那就是大幅提升高等教育总人数的需求。目前主流的基于校园的高等教育不能满足如此大的需求。在这方面，和开放灵活学习的模式提供了相关的解决办法。

B． 终身学习没有得到较多关注。然而，提出的非正式学习、无形式学习和正式学习之间自然的桥梁架设，以及提供主要的机遇来拓宽和增加高等教育的参与性，这使可能成为终身学习（LLL）领域中最有力的武器。

C． 报告中提及了公共资金。考虑到知识是公共产品，应真正免费地提供，政府在高等教育（和

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总体教育）的通道、质量和效率方面被假定的责任，这些证明这是讨论一个政府提供资金的“产品”。

D. 从终身学习（LLL）视角来看，网上传送免费获得的内容应使学习者能够真正的在开放灵活学习环境中依靠自己学习，不（避免）涉及到教师、班级或教育机构。这要求结构化的、明确的、学习者中心的内容设计，而不上传统的教师中心的内容方式。

E. 有人可能问，对于开放，“无成本”是否是最基本的，或者这实际上是一个复杂的机制，这个机制能扫除所有传统存在的障碍：机构注册、文凭/证书要求、校内上课与面对面会议、固定课程、严格的进度、过于专门化的大纲、太大的大纲组成以及其他。这实际上是开放和远程学习（ODL）大学的有特色的开放的生死攸关所在：按最广泛的解释，对通道、地点、日程、进度和综合课程的开放，与对人、方法、观点的开放一样。把这种开放与相连，能够使ODL大学成为运动中的重要选手。

F. 许多使用者好像是有良好教育的学习者。这并不奇怪，因为材料一般不是为自学而设计，这就是为什么在没有另外引导或支持下要求学员有一个较高教育水平的原因。这意味着的潜能远没有开发出来。报告在前面指出了三个来自ODL大学的欧洲举措（UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL）。3这些活动可视为发展中的一代（“第二波”），因为它们的学习材料是明确为自学而设计的。这与提供教室学习材料相比，明显减少了自学者的困难。如果我们严肃的看待UNESCO的“人人都要受教育”的目标，这是极其重要的，这也是与前面关于人数升级、LLL和非正式学习的评论相连接的。

G. 开放课程应该考虑到其他国家的知识和版权遗产，特别是在中国。应该意识到开放课程是可能会成为一方的行为。如果对开放课程的“索取者”比“贡献者”，世界将会更富裕吗？如要

3 见：
http://www.open.ac.uk/openlearn/home.php;
http://www.opener.ou.nl/
http://www.eadtu.nl/
欧美中心的机构控制着贡献——好像就是这样——国际化成果将会是什么？

H. 的彻底开放导致在连续与互动的发展和补充过程的巨大灵活性，无论是任何地方、任何时候还是任何人。贡献者愿意投入时间为活动去工作，并且享受来自任何时间、任何地方的其他人的输入与反馈。然而，一旦作为推动者的热情减退，保持材料在高质量上的更新可能是非常困难的。

I. 报告没有提供具体有力的经济模式。然而，高等教育机构有各种选择来找到可能的收入，不是来自内容，而是来自声望，来自考试过程，来自对学习者的个人支持。

J. 在一些地区和领域，信息和通信技术（ICT）可能缺乏，有‘预期的使用者被落在后面’的危险，因此，成功的运动的先决条件是更容易、更好地通向ICT设施的通道，这一点表明，在任何行动计划中，它应有高度的优先。

K. 在许多国家，并不广泛地说英语，几乎不可能有效地加入国际社会。一个办法就是以不同的（工作）语言来开展的举措。这种做法是鼓舞人心的和必要的。然而，要与来自世界不同地区的同事一起充分分享经验和课程，语言仍是一个障碍。

L. 一般的翻译是不足够的，因为学习材料的转换也应包括对不同社会文化情境的适应。因此，所谓的”本地化”过程自动化不是办法，这里暗示了“艰苦的劳动”。

M. 受到发展中国家的热烈欢迎，因为这将为学生和机构提供通向学习材料的通道，以前这仅仅限于专门机构的使用。因为能够减少它们学习材料的开发成本，开放和远程学习（ODL）大学能从材料中受益。然而，在发展中国家，使用也有严重的障碍：（i）获得ICT设施的程度很低，并且相应的费用很高，（ii）学习者和他们生活的社会文化情境，与材料开发国家的环境是非常不同的。本土化是绝对必要的。

N. 质量保证（QA）话题在报告中提及，但它的重要性从来没有被高估。开放和远程学习（ODL）大学可通过它们声誉和品牌给材料贴标签（像在报告中建议的一样），这很容易做
到。在欧洲，远程教育大学欧洲协会(EADTU)使用一个QA项目，叫作“卓越(Excellence)”，来从各个方面把握电子学习的质量。它的成果受到普遍欢迎，在直接操作使用方面是很实用的，并且对质量保证可能是有价值的。

4 鉴定 2007 年在 OUNL 召开的国际开放与远程教育理事会的成果

在荷兰开放大学(OUNL)召开的以“开放教育资源作为建立面向所有人的教育的手段(Open Educational Resources as an instrument for achieving Education for All)”为主题，这个会议对于特别工作组来说是一个重要事件。你可以说大学校长常设会议作为特别工作组的临时延伸、开展反馈、批评性反应、产生观点、设置优先并且为国际开放与远程教育理事会和它的成员的未来指出方向……

大学校长常设会议是一个专用会议，专用于国际开放与远程教育理事会成员机构的领导(副校长、院长、主任、校长)。2007年大学校长常设会议有来自22个国家的大约60位参会者(其中有10名特别工作组成员)，全世界所有大陆都有代表。大学校长常设会议的议程显示了一个全体会议的混合，它的不同专家发言人来自学术界、研究机构、政府、产业界、ODL大学行动组、UNESCO和OECD，并且会议包括一系列高度互动的主题研讨会。荷兰教育文化科学部长出席了开幕会议，因此显示出总体主题对于荷兰建设知识社会的重要性。特别工作组主席介绍了特别工作组的临时报告，作为适应2007年的大量预备工作。

三个主题研讨会证明是非常富有成果的和有效的。参与者基于他们的地区(大陆)来源被分成小组：一个亚洲组、一个欧洲组和一个其他大陆组。

在第一个关于“对于国际开放与远程教育理事会成员来说是什么”的研讨会，讨论的焦点围绕着“在中什么是典型的ODL机构(国际开放与远程教育理事会成员)的问题和“什么问题更具有普遍本性”的问题，让所有(高等)教育机构来考虑，让国家权力部门来处理。

第二主题研讨会是关于“国际开放与远程教育理事会成员政策及其影响条件和执行”的，陈述的问题
是“国际开放与远程教育理事会能够和必须做什么来协助世界范围的运动和服务其成员”。因为参与者是按他们的地区来源分组的，很容易记录出他们提出的大量不同的主题。以 UNESCO 的一个调查为基础来发现关于的话题，这些话题经过讨论并安排出优先顺序。版权问题，意识产生和提高，资金问题，质量保证，学习支持服务和学习的评估，这些都是参与者高度关注的话题，但因来自不同的大陆，其优先顺序也有不同。

这个研讨会提出一个给国际开放与远程教育理事会的建议作为结果，要求国际开放与远程教育理事会为成员建立一个数据交换所或者支持中心。这个支持中心，提供有关不同的主题的信息。同时，这个支持中心能跟踪的进展、成员机构的进展，并在其他成员中分享这些信息。国际开放与远程教育理事会也可为全体成员建立一个在线培训项目，并且致力于在开发材料中关于原数据水平的标准澄清。

第三主题研讨会是关于“国际开放与远程教育理事会成员的方法的可持续性”的，触及了关于机构商业模式的根本性讨论。如果内容不再是唯一的卖点，机构用什么去面对市场？或者意味着我们今天所知道的机构过时了吗？这个讨论和第一个研讨会的讨论紧密联系，而且在第一个研讨会里，我们也考虑了国际开放与远程教育理事会做的定义，如果按照这个定义，那么在高等教育领域有多么开放呢？这个开放是指免费开放吗？我们可以从这次研讨会中总结出，不仅没有明确的定义，而且可持续性发展也没有单一模式。开放教育资源的发展和当地的实际情况密切相关。这次研讨会的结论表明，开放教育资源的可持续发展和社会公众的资助有明显的关联。不仅如此，一方面，政府想更多地参与高等教育发展；另一方面，政府需要对公立机构提出的开放教育资源的可持续性重新界定，这两方面是直接相关的。当然这并不意味着，开放教育资源学习资料都是向学习者免费开放的。可以说，对于所有参加开放教育资源学习程序的学习者来说，开放并不等于免费。这次研讨会还建议国际开放与远程教育理事会要建立一个能促进信息交流、学习最佳实践、加强彼此合作的技术设备。同时研讨会还提醒国际开放与远程教育理事会，不要重复其他机构已经做过的东西。

特别工作组(TF)的中期报告，专题研讨会的许多相关结论，与会发言人的深刻独特的学术见解，
以及所有参与者的积极参与，正是这些使得大学校长常设会议成功闭幕，并得出了一些合理和独特的结论和建议。在大学校长常设会议之后，特别工作组在海尔伦举办了一个会议，评审实际上采用了大学校长常设会议的结论和建议，而且还按照国际开放与远程教育理事会制定的扩展性方案，对这些结论和建议进行了稍微的补充和扩展。在稍后的第七章我们将会阐述，合并后的特别工作组对大学校长常设会议的结论和建议的评审，以及特别工作组对它们的扩展。

6. 国际开放与远程教育理事会 2007 年大学校长常设会议之后的新进展

我们正在目睹开放教育资源运动在全球稳步开展。

- 首创精神的浪潮在全球不断高涨，不论是在高等教育还是中等教育领域，从世界一流顶级大学到地方学院，从研究机构到个人实践，再到不同学科，都在追求这种首创精神。

- 自联合国教科文组织国际教育规划所（IIEP）举办了先前一系列论坛以来，联合国教科文组织开放教育资源委员会一如既往地发挥着积极作用。

- 隶属麻省理工学院的开放课件联盟发现，世界各个国家的研究机构的会员人数都在急剧增加。

- 在资助开放教育资源项目上，威廉与弗洛拉·惠普基金会（the William and Flora Hewlett Foundation）已经发挥很大作用（它首先资助了麻省理工学院 2001 年的项目）。该基金会凭借其财政以及庞大的专业技能和建议体系（可登陆网站 http://www.hewlett.org/Programs/Education/ 查看），在推动运动发展的过程中，仍然扮演着关键角色。

特别工作组报告显示，近期开放教育资源运动在欧洲的发展特别有趣，欧洲人认为开放教育资源只是大体上向灵活性学习开放，开放教育资源和开放数字图书馆大学更具体地联系在一起。英国开放
大学的开放学习项目(UK OU)以及开放大学国家图书馆(OUNL)开放教育资源项目，都启动于2006年，至如今，这两类一流大学都陷入策略困境，一方面是学术壁垒，另一方面是开放教育资源，要完全转变为开放教育资源是有难度的。欧洲远距教学大学学会(EADTU)项目中的其他八个开放数字图书馆大学都是自己制定和执行策略的。在这些开放数字图书馆大学中，土耳其阿纳多卢开放数字图书馆大学在其50年校庆上宣布，它在制定全面开放教育资源策略上做得最好。

欧洲远距教学大学学会将举办开放教育资源系列研讨会，该研讨会还得到了惠普基金会的部分资助。这个系列包括三个开放教育资源研讨会。开放教育资源策略实施研讨会已于2008年5月在英国开放大学举办，此次研讨会着重讨论欧洲开放数字图书馆大学问题。第一个研讨会的成果已经公布(可登陆网站http://labspace.open.ac.uk查看)。会议讨论了英国开放大学(开放学习)和开放大学国家图书馆(开放教育资源)提出的主要问题，这些问题涉及了策略、可持续性、技术、网络协议、课程、学术合作、质量和组织结构诸多方面。另外，参与者遭遇的难处也提供给了开放数字图书馆大学，以便更好的完善服务方式。

开放教育资源策略发展研讨会专门为那些符合规定的大学和协会而举办的，目的是分享知识和交流经验。本次研讨会由K.U.Leuven主持，时间为2008年10月28日和29日。

开放教育资源能力建设研讨会，目的是在各州为开放教育资源能力建设提供一个舞台，将着眼于提高人们对开放教育资源的认识，以及对开放教育资源问题的不同观点、策略和优先考虑的事情进行收集和整理。这次研讨会的举办将和联合国教科文组织紧密配合，研讨会时间拟定于2009年1月(日期待定)，地点在巴黎联合国教科文组织总部。

最后，这章关于国际开放与远程教育理事会大学校长常设会议2007年会议后的新进展，仍然有值得注意的地方：

最近，联合国教科文组织(UNESCO)公布了一个有趣的文件“开放教育资源：开拓道路前进”，这个文件是公众对如何推进开放教育资源运动反思的集体性成果：主要讲述了重大争议、优先
Fred Litto, special team member, at the 2008 July PCF5 conference in London, presented a report on the work of the special team (TF), which was a stimulating and worthwhile meeting, where everyone discussed education resources. In this meeting, UNESCO (Susan D’Antoni), HP Foundation (Marshall Smith, Catherine Casserly), and Vijay Kumar from MIT and the Indian National Knowledge Commission (NKC) made reports.

Without question, the participants will discuss and evaluate open education resources and select them as one of the themes of the 2009 ICDE/EADTU World Conference, which will be held in Maastricht (M-2009).

Conclusion and recommendations

As mentioned in Chapter 5, this chapter will introduce the conclusions and recommendations of the permanent meeting of university presidents in 2007, which have been accepted by the special team, as well as the special team’s further measures to implement the TF.

In this final report of the special team, there are ten major conclusions:

1. The main question: ‘UNESCO’s ‘education for all’ policy, capacity building, and increasing access to education resources, what role can open education resources play in solving these problems?’

2. The second question: What role do open education resources play in promoting and developing a knowledge-based society?

3. Linking the characteristics of open digital libraries (ODL) and open education resources, ensure effective measures to solve primary and secondary education problems.

4. ‘Open’ does not mean ‘free’.

5. Let open education resources远离教条的方法和观点。
6. 在目标群体、目标和志向、发展状况、国家体制、规模和范围、内容共享等等问题上，当我们考虑开放教育资源能给予的潜力和机会时，多样性显得尤为重要。

7. 正是由于这种多样性，开放教育资源的国际优先等级无法划分，而且这种优先权应该回归机构，最多要回归国家层面。

8. “知识是一种公共产品。”——正因为如此———因此需要公共资助。

9. 可持续性模式也并非一成不变，它随着资助方案的变化而变化（随着各个组成部分或多余的资金、权重而变化）。

10. 有必要探索社会与个人的相互作用与合作的潜力和增加值。

在特别工作组最终报告中，有如下八个建议：

国际开放与远程教育理事会（以及它的成员）应当：

A. 不要研究一般的开放教育资源问题（因为其他人已经在研究了），要集中于研究开放教育资源材料中的自学和学习者中心的学习方法（将开放教育资源中的开放数字图书馆特色和国际开放与远程教育理事会成员的概况联系起来了）。

B. 要对开放教育资源的多样性问题、潜在的假设或根据以及行动多样性（比如，国际开放与远程教育理事会和联合国教科文组织之间的合作）做出更加深入的分析。

C. 开发关于开放教育资源和开放数字图书馆联系的实践报告或是手册，包括这样一些主题，如开放教育资源的实施、质量保障、可持续性、对语言和文化的适应、内容与服务、知识产权和版权，所有这些都要以可以取得的案例为基础（例如，从欧洲的领先机构，欧洲远程教学大学学会以及其他区域型机构）。

D. 开发国际开放与远程教育理事会网站并将其作为信息交流和讨论的论坛，还要为国际开放与远程教育理事会成员以及其他机构建立一个服务中心，以便交流策略、政策、最佳实践、专业知识和
加强它们与国际开放与远程教育理事会的合作。

E．致力于提高人们对国际开放与远程教育理事会的认识与了解，鼓动政治效应和加强媒体对国际开放与远程教育理事会的宣传。

F．将教职员、学生、机构观点所关注的一些问题列成清单，这些问题应是可以预见的，还要构想出解决方案。

G．加强与区域性和欧洲大陆的开放数字图书馆机构（如 EADTU，AIESAD,AAOU,ACDE,USDLA,ABED,…）以及其他国际机构（如 UNESCO,OECD, Hewllet Foundation, Open Courseware Consortium, Commonwealth of Learning /COL, SEAMEO,…）进一步合作。

H．开办开放教育资源（）暑期学校，每个地区或是每个州开设一个这样的学校来培养教员。暑期学校不仅要和合适的开发数字图书馆机构紧密合作，而且还要和选出来带头的成员机构合作；参加学习的对象包括国际开放与远程教育理事会的成员（如果愿意的话）以及非国际开放与远程教育理事会成员的人。

建议（H）中提到的暑期学校和欧洲远距教学大学学会（EADTU）的倡议有着很大联系，正如在前一章阐述的那样，EADTU 得到了惠普基金会的资助，举办 2008 年系列讨论会。三个 EADTU 研讨会的最后一个就是能力建设研讨会，这是专门为欧洲以外开放数字图书馆大学的校长举办的，目的是为了将这个研讨会的影响传播到其他各洲。本次研讨会将于 2009 年初在巴黎联合国教科文组织总部举行（国际开放与远程教育理事会的特别工作组也是在这里开始工作的），同时我们也在考虑为随后的区域性或是大洲的研讨会（或暑期学校）建立一个探索式平台或者说模型。在这个问题上，如果国际开放与远程教育理事会、EADTU 以及其他 ODL 机构能够通力合作的话，将是很明智的。

最后，特别工作组向国际开放与远程教育理事会执行委员会建议，免除特别工作组的职责，解除
特别工作组，重新建立一个新的特别工作组，任用国际开放与远程教育理事会成员里的专家，他们能够致力于这个报告所提的建议。这样一个新的特别工作组的成立，应该取得国际开放与远程教育理事会执行委员会的同意。

关于这个最终报告，特别工作组建议国际开放与远程教育理事会执行委员会，将这次报告出版成能吸引社会公众的版本，并且要鼓动政治效应以及加强媒体宣传。借助于国际开放与远程教育理事会成员的努力，要使尽可能多的各个国家的出版社以及利益相关者都可以获得这份报告。

7 结束语：印度找到了开放教育资源的途径了吗

印度拥有直辖于总理的高级咨询机构，即国家知识委员会（NKC）。印度国家知识委员会（NKC）成立于2005年10月，截止到目前，已经向国家递交了两个年度报告。印度国家知识委员会（NKC）在其随后的一些报告中表明，NKC 得取了政府的积极支持，政府采用国家知识委员会（NKC）的建议并且向其提供适当的资金支持。国家知识委员会（NKC）的议程表把教育提到非常高的优先地位，把它看作是加快国家发展的主要工具，具体强调了教育扩张、教育优质和教育平等。

"2007年NKC报告"回顾了先前2006年报告中的建议，而且详细说明了2007年NKC报告中的建议。2007年NKC报告的建议涵盖了很多方面：卫生信息网、入口问题、法制教育、医学教育、教育管理、知识产权、革新、传统医疗卫生系统、社会资助研究的法律体制，还有两个和特别工作组特别相关的方面：开放和远程教育（ODE）和开放教育资源（）。

NKC报告的第17页这样写道，"远程教育向许多学生(包括有特殊需求的学习者)提供了他们接受教育的途径。随着媒体种类的激增，如电视、无线电和因特网，远程教育的影响范围显著增大。NKC报告对于远程教育的建议主要集中在以下几个方面：建立国家信息技术研究所（ICT）；开发基于网络的开放资源，成立信贷银行，提供全国考试服务。"

NKC报告的第51和52页陈述了开放教育资源。以下是我引用报告的三段：
“在很大程度上，我们在知识经济中所取得的成就应归功于我们着眼于提高教育质量和增加教育机会。而要达到这个目的，一个行之有效的方法就是通过宽带互联网的连接，促进开放入口（OA）优质资料的传播以及开放教育资源的发展。互联网将使学习者更加轻松地获取高质量的教育资源，也能彻底地提高教学方法。”

“我们应该挑选出一些重要的机构，还要要求一些代表多种知识领域的专家（如农业、工程、医学、艺术、人文、科学、教育等等）开发以标准为基础的不同内容，以满足有不同需求的学习者。这些开发的内容不仅供印度的机构使用，还要供全球其他国家使用。”

“知识库的内容应该是多媒体的互动性知识，而且还要翻译成不同的区域性语言。这些规划设计应该涵盖上面所提到的科目。为了加快开放教育资源的创建、适应和使用，有必要开办一次‘全国教育内容和课程会议’。”

（黄复生校）
Respected Chairman, Respected Vice-chancellors, Presidents, Ladies and Gentlemen,

It is my pleasure to have the opportunity to say something about China Radio & TV Universities (CRTVUs). Here, before I start my speech, I would like to express my sincere thanks to Prof. Zhang Minxuan, Deputy Director General of Shanghai Municipal Education Commission, for his support for Shanghai TV University and Eastern Part of China in distance education development.

Let me start my speech now. At the end of this September, Dr. Carl Holmberge sent me an e-mail. Carl told me that many of our colleagues should be interested in how to manage mega universities like CRTVU. Actually, this issue often puzzles us in our daily operation. So sometimes, I think we should thank the founders of our university who designed the structure. It is complicated, but efficient till now.

So today I will try to explain this structure to the audience. It is a case study. I would describe it in three parts. One is something about status quo of CRTVU, the second is something about management, and in the third part, I will try to discuss some challenges and perspectives.

Status quo of CRTVUs:

Let’s first look at the status quo in the CRTVUs. Here, I will mention two points, the point one is the number of students and the point two is the structure of the nation-wide ODL system.

According to Sir John Daniel, a mega-university is a distance-teaching institution with over 100,000 active students in degree-level courses and 11 institutions in the world met these criteria in 1996. China Radio & TV Universities is the largest distance education system in the world and one of the mega-universities.

The scale of the CRTVUs is amazing in the eyes of many visitors. In this diagram I will show the changing trend of student number. In the diagram, you can see the red color stands for the enrollments, the blue line refers the number of recruits, and the green one stands for the graduates. In this picture, you can see, in 2007, the enrollment is 2.2 million.

This diagram shows the changing trend of the staff in the past 20 years. The red line indicates the total full-time staff, blue line stands for full-time teachers, and the yellow line stands for part-time teachers. You can see the number of the full-time
teachers keeps up growing with the enrollments of students.

This picture is the structure of the system. On the left side, from the top to the bottom, it is Ministry of Education, Provincial-level Educational Administrative Department and City-level and County-level. On the right side, from the top down, you can see, the CCRTVU, then we have 44 RTVUs at provincial-level, and nearly 1000 RTVUS at city-level, and about 2000 RTVUS at county-level.
The System of CRTVUs

In this picture, I use the tree to describe the structure for you. In the upper part of the tree, the trunk stands for the CCRTVU, and the main branches stands for the Provincial-level RTVUs, maybe the small branches stands for the City-level RTVUs, and at the end of branches stands for the County-level RTVUs. In the lower part, the main root stands for the function of Ministry of Education, and the departments of local government, and the side roots stands for the conventional universities, trades and other government departments, and the fibres stands for the full-time and part-time teachers. This is the first part.

Management of CRTVUs

We have two lines in the management. The line one is administrative line (MOE, PEAD, CiEDA, CoEDA), and another line is academic management (CCRTVU, PRTVUs, Branch Schools, Working Stations, Teaching Venues). Generally speaking,
these two lines are separated. That means that RTVUS at different levels, they are independent in administration.

The responsibilities of administration include design for organizing structure, deposition of personnel, engagement of staff, and financial budget. All these responsibilities are managed at different levels under the auspices of the relevant authorities.

The responsibilities of academics include deposition of teaching venues, development of specialties and courses, construction of teaching resources, control of teaching and learning process, management of faculty members, and evaluation. The features of Academic management are that CCRTVU is responsible for the overall plan and unified criteria, and relevant RTVUs will implement academic management at the request of CCRTVU. In the next slides, some details will be discussed.

2.2.1 Deposition of teaching venues

In the deposition of teaching venues, CCRTVU is responsible for the overall design and control, and setting up the criteria for the requirements of hardware, software, composition of staff and teaching & learning. Provincial RTVUs have to take charge of regional design and be responsible for daily control. Teaching venue need to construct itself, implement teaching and learning, and receive evaluation.

2.2.2 Development of specialties and courses

In the development of specialties and courses, all of the following responsibilities will be assumed by the CCRTVU: providing the overall design, setting up necessary criteria, developing new specialties and courses, and conducting evaluation and examining the satisfactory from the users.

2.2.3 Construction of teaching resources

In the construction of teaching resources, CCRTVU is responsible for drawing up the comprehensive design, setting up criteria of construction, taking up the principal construction, and conducting evaluation. Provincial RTVUs are responsible for constructing teaching resources with local characteristics.

2.2.4 Teaching & learning process

In the teaching & learning process, the interaction will be stressed on in the whole process of teaching and learning. Teaching and learning is mainly implemented by the teaching venues. The PRTVUs will supervise, review and offer learning support, and subdivide responsibilities, and CCRTVU will define requirements and criteria, and inspect implementation.

2.2.5 Management of the faculty members

In the Management of the faculty members, the well-known course presenters and chief editors will be engaged and trained by the CCRTVU, and CCRTVU’s full-time course coordinators will receive regular training and organize training programs for the PRTVUs. PRTVUs’ course coordinators will not only receive training by the CCRTVU, but also organize training programs for the local RTVUs.

2.2.6 Evaluation

In the evaluation, the MOE (Ministry of Education) will evaluate the CCRTVU. The CCRTVU will organize evaluation within the system and carry out evaluation in PRTVUs. PRTVUs will organize evaluation in the local RTVUs.
Challlenges and Perspectives

Let’s talk something about the challenges and perspectives. Are there any difficulties in managing such a mega university? Of course, lots of difficulties. But, the main difficulties are to maintain two balances. The first one is how to maintain the balance between the unified academic requirements and the diversified demands in different regions. You know China is a big country. So from place to place, the economic conditions and people’s living conditions are different so that there is great challenge. Another balance is between the coordination of academic management and localization of administrative management. You know we have two lines. Generally speaking, the two lines are separate. So how to keep the balance is a hard job.

Measures to be taken

Then what should we do about these challenges? We have done a lots, but we found that if we do more, and more will wait for us to do. So, such as how to build up the culture of the virtual campus, how to increase cohesion of the systematic structure, and how to improve informationization of CRTVU according to the progress of ICT, and how to reinforce professional development, and how to enhance quality for support. We have to make concrete plan for this.

Perspectives

Generally speaking, our objectives are as follows: to gather quality learning resources, to operate high-efficient network, to provide satisfactory learning support, and conduct dynamic & effective research.

Thank you for your attention.

Commented by Prof. V. N. RAJASEKHARAN Pi, Vice-Chancellor of Indira Gandhi National Open University (IGNOU), and Chairman of Distance Education Council

Mr. Chairman, Distinguished Presidents, ladies and gentlemen,

Let me first congratulate the President and faculty of the team of Shanghai TV University for the wonderful hosting this really important meeting. We sit and talk open and distance learning in the years to come.

The China open education system is a omnipresent mode for any country, which to operate in the large scale with several hundred thousand learners in different contexts.
IGNOU and Open University System in India and Distance Education Council also face the challenges of these kinds. I am glad that the China Open university system really give the mix of the media, radio and TV. Its organization and its introduction prove that TV universities are also very effective.

In our system, in IGNOU and in the Open University System in India, we are under two puzzles up to now, how ODL can implement the quality of teaching and learning process, and enhance the quantity of education. We look at each other’s learner and each other’s teacher, not only in the open university system or distance education institutions in conventional universities. We look at the entire higher education system and the school education system as well.

We have large mandate of providing in the next five years, for people’s need of the Indian higher education system in the country, up to now IGOU and open university system in the country cater to the enrollment of 23% of doctor student population in India. 11 million students may have in the university system, and over 26% by open university system up to now.

Coming back to the technology again, what the wonderful China TV University system is doing, technology has not happened in a big way up to now, but we have structured during the last three years and will use the technology in the effective way. Just as an example, IGNOU through our satellite, cable abilities and LAN to home, we can reach now 15 million homes different levels and different learners. Compared with China TV University, our numbers are much less, but IGNOU have 1.95 million learners. 95% distance learners are even now making use of printed material, muti and multi-media materials that is 5%. The online is only very recent phenomenon.

The conventional system also being provide these capabilities, we have all 400 conventional universities in the country now and in the next 5 years in India, we call a education plan, we want to place several hundred small university, for example Knowledge Commission set by the government in India, The commission said that 1200 university have to be placed in the five years to coming in the country.

So IGNOU and Distance Education Council, a new schema which now converges conventional university system and Open university system. We provide support to the large number of colleges and large number of universities, how ODL technologies can be integrated into the teaching and learning process, for example, how a science teacher can make use of open and distance learning technology for improving the quality of teaching and learning process in his or her classroom, how that class can be available to anybody, anytime, and anywhere, and then we have the space research system of the country. We have the organization of Indian Space Research Organization probably also landing the moon in the years to come to young. We need to do more to plan it. In this space organization to provide satellite cable abilities to education and education institutions. We have schools like that for education to use it. IGNOU and open university system in the higher education as well as school education system in the country are really making use of the satellite. We have also Space Research Organization for satellite education in our country and we are providing the capabilities to large number of education institutions for making use of the satellite to reach the vast villages.
Compared to China open university system, definitely, China is a much larger and bigger country, diverse regions. But we have much challenges in the dealing with different languages, this is a challenge for us. We have 20 office languages in our country and in the relation to several hundreds of dialects. We have 13 open universities in our system, as well as conventional university system are here. The 13 open universities should use English, but they have the responsibilites to blockdarms individual language, and now IGNOU want to provide public partipation in education. We also interact and cooperate with government and non-government organizations, and survey societies to understand what type of knowledge and what type of skills are required in those regions, and then try to provide these knowledge and these skills in different languages and different dialects. These are some challenges, and we also have quality assurance systems. We finally set quality assurance system and assessment qualification in the country. We have National Assessment and Accreditation Council for this type of conventional university system. We are evolving assessment for the open university system, for the development of material, for the development of multimedia materials, and online material, and satellite education systems.

We see lot of development and lot of things to be happen in china open and distance system, let me congratulate China open university system for the wonderful work. They can provide and meet the challenges of education in the years come.

Thank you very much.

Question: About 3 years ago, at a meeting in Beijing, the question was put by one of friend in Chinese Open University, you are using Chinese dialects, and the question was in China in other minority areas, for example Xinjiang, Mongolia, we can see that professors for teaching these people are getting more and more and the Chinese unity is expanding. Has anything improved?

Answer of Prof. GE Daokai: Thank you very much for your very good question. Prof. Pilla said. In China, CRTVUs teaching the courses mainly by Chinese, but for the minority area, we have a plan to use minority language. For example, in Xinjiang Autonomous Region, we have Wei and Chinese two languages to teach the courses for three years. We have the pilot for three years. Right now, the programme goes very fluently. Maybe this year and next year, we will try in the Mongolia, and try in the Korean and Chinese bilingual teaching, you know lots of Korean people live in east.
巨型大学的管理——中国广播电视大学系统案例研究
中央广播电视大学校长 葛道凯

尊敬的主席先生、各位校长们、女士们、先生们，

很荣幸有机会在此谈一谈中国广播电视大学系统的管理。在报告开始之前，我认为首先要感谢上海市教育委员会副主任张民选教授，感谢他对上海电视大学以及中国东部远程教育发展的支持。

接着我要开始我的报告内容。9 月底，卡尔·霍姆博格博士给我发了一份电子邮件，卡尔告诉我，我们很多同事应该会对像中国广播电视系统这样的巨型大学的管理感兴趣。事实上，在我们日常工作中，这一问题也常常困惑着我们。因此，有些时候，我觉得真应该感谢我们大学的创始人，他们设计了这一体系，虽然这一体系结构如此复杂，但是今天它的运作却十分有效。

因此，今天我将试图介绍我们的这一体系，这是一个案例研究。我拟从三个方面介绍一下开放大学的管理，第一部分内容让我们共同考察中国广播电视大学系统的发展现状，第二部分我将论述中国广播电视大学系统的管理模式，第三部分，我将试图讨论我们所面临的挑战和未来前景。

中国广播电视大学系统的现状

关于现状，我想谈两点，第一点是学生的数量，第二点是国家范围的远程开放学习系统的结构。

根据约翰·丹尼尔爵士的理论，巨型大学是指拥有十万以上攻读学位课程的在校学生的远程教育大学，1996 年全世界范围内有 11 所大学属于巨型大学。中国的广播电视大学是
世界上规模最大的远程教育系统，也是巨型大学之一。

许多来访者都曾为中国广播电视大学的规模感到震惊。在如下图中，我将介绍学生数量的变化趋势。在该图中，你可以看到，红线指的是在校生人数，蓝线指的是招生人数，绿线指的是毕业生人数。不难看出，2007年，我们的在校生人数达到220万。这是官方统计的数据。

下图反映了过去20年来教职工的变化趋势。红线表示教职工人数变化，蓝线表示全职教师的变化，而黄线表示兼职教师的变化。从中你可以看到，全职教师的数量随着在校生人数的增长而不断增加。
下面的图片是系统结构图。图的左半部分，从上到下，是教育部、省级教育管理部门，以及市、县级教育部门。图的右半部分，从上往下，你可以看到中央广播电视大学、44 所省级广播电视大学、近 1000 所市级广播电视大学，以及 2000 所县级广播电视大学。

在下图中，我给大家用一棵大树来描绘我们的结构体系。在树的上半部分，主干代表中央广播电视大学，主要的树枝代表省级广播电视大学，小树枝代表地、市级分校，而树枝的...
末梢代表的是县级工作站。在树的下半部分，主要的树根表示教育部和当地政府的作用，旁侧根表示传统大学、行业和其他政府部门，而须根则表示全职和兼职教师。这是我要讲的第一部分内容。

中国广播电视大学系统的管理

我们有两条管理线索。第一条线是行政管理（教育部、省级教育部门、市级教育部门和...）
县级教育部门，另外一条线是学术管理（中央电大、省级电大、地市分校、县级工作站和教学点）。一般来说，这两条线是分离的，这意味着不同层次的广播电视大学在行政管理上是相对独立的。

行政管理的职能包括组织结构的设计、人员任命、员工聘用，以及财政预算。所有这些职能管理都是在不同层次的政府部门支持下运行的。

学术管理的职能包括教学点的设置、专业和课程的开发、教学资源的建设、教学和学习过程的控制、员工的管理，以及评价。学术管理的特色在于中央广播电视大学负责整体规划和制定统一的标准，而相关的广播电视大学按照中央电大的要求实施学术管理。在下面几页PPT中，我们将详细讨论这些内容。

2.2.1 教学点的设置

关于教学点的设置，中央广播电视大学负责整体的规划与监控，制定软件、硬件、人员组成、教学和学习等方面要求的标准。省级电大负责在地方的规划和日常监控。教学点需要自建、实施教学，同时接受评估。

2.2.2 专业和课程的开发

在专业和课程的开发方面，中央广播电视大学承担以下职能：提供整体的设计，设定必要的标准，开发新的专业与课程，开展评估，并考察使用者的满意度。

2.2.3 教学资源的建设

在教学资源建设方面，中央广播电视大学负责整体规划，设定资源建设标准，从事主要的资源建设，并开展评估。省级电大根据地方特色，建设适合本地的教学资源。

2.2.4 教学和学习过程

在教学过程中，我们强调交互的重要性。教与学之间的互动主要由教学点来实施。省级电大负责监督、检查地方电大并提供相关的学习支持，细化职责等，而中央广播电视大学将
负责确定要求和标准，并检查实施情况。

2.2.5 教师管理

在教师管理方面，中央广播电视大学负责聘任并培训知名的主讲教师和主编，中央广播电视大学的全职课程主持教师一方面定期接受中央电大组织的培训，另一方面还要负责组织省级电大教师参与培训项目。省级电大的主持教师不仅要接受中央广播电视大学的培训，还需组织对地方电大的培训项目。

2.2.6 评估

在评估方面，教育部组织对中央广播电视大学进行评估，而中央广播电视大学将组织系统内部的评估，重点对省级广播电视大学进行评估，省级广播电视大学则对地方电大进行评估。

挑战与前景

让我们谈谈挑战与前景吧！或许大家会问：“管理这样一所巨型大学一定会碰到许多困难吗”？是的，我们的确遇到了许多困难。在我看来，主要的困难是如何保持两个平衡。首先是如何在统一的学术要求与不同区域的多样化需求之间达到平衡。众所周知中国是一个大国，不同地区的经济条件和人民生活水平都有所差异。因此挑战是巨大的。另一个问题是如何处理教学管理与地方行政管理之间的平衡。我们有两条管理线，且这两条线是相对分离的，因此如何保持平衡的确是一项艰巨的任务。

拟采取的措施

我们如何应对以上这些挑战呢？我们做了很多工作，但是我们发现做得越多，就会有更多的事情等着我们去做。因此，如何建构虚拟校园文化，如何提高系统结构的凝聚力，如何在信息通信技术快速发展的过程中提高广播电视大学的信息化水平，如何加强队伍的专业化建设，以及如何提升学习支持服务的质量等，在这些方面我们将做出具体的规划。
前景

我们的目标如下：汇聚优质的教学资源，运行高效的办学网络，提供体贴的支持服务，开展鲜活的科学研究。

感谢各位的聆听！

点评：印度英迪拉·甘地开放大学校长、印度远程教育理事会主席，V. N. RAJASEKHARAN Pi教授对葛道凯校长报告的点评。

主席、尊敬的各位校长、女士们、先生们，

首先，恭喜上海电视大学的校长及员工组织了如此重要、精彩的会议，我们坐在这里共商未来的开放与远程学习。

对于任何国家来说，中国开放大学系统是世界上独一无二的模式，其拥有来自不同背景的成千上万的学生。

英迪拉·甘地开放大学和印度的开放大学系统同样也面临上述挑战，我很高兴听到中国开放大学系统在使用各种各样的媒体，而且其组织结构和运作证明该系统是如此有效。

在我们的系统中，在英迪拉·甘地开放大学和印度开放大学系统中，目前我们有两大难题，即如何利用开放与远程学习实施高质量的教学和学习过程，同时还要提高教育数量。我们不仅考虑开放大学系统或传统大学的远程教育机构，而且还考虑高等教育系统和学校教育系统中的学生和教师。

在印度，未来的五年，我们要满足大众对高等教育的大量需求。目前为止，印度23%的在读博士是在英迪拉·甘地开放大学及印度开放大学系统就读，而我们的大学系统有一千
一百万学生，其中 26% 以上的学生是在开放大学系统就读。

再回头谈谈技术，中国电视大学系统在这方面有精彩之处，但是直到目前为止，我们还
没有很好的利用技术，但是在过去三年我们已经进行了规划，并将有效的利用技术。举例来
说，通过利用卫星、电缆和局域网，英迪拉·甘地开放大学目前能深入一千五百万家庭，面
向不同地区的学习者。与中国电视大学系统相比，我们的学生数量虽然有点少，但英迪
拉·甘地开放大学目前有 195 万学生，95% 的远程学习者目前仍利用印刷材料，使用多媒体
和多种媒体材料的学生仅占 5%，而网络仅仅初露端倪。

传统大学系统也提供远程学习，现在印度全国有 400 所大学，未来五年，我们有一个
教育规划，希望创办几百所小型大学。例如，据印度政府设置的印度知识委员会（Knowledge
Commission）说，在未来五年要在国内创办 1200 所大学。

因此，英迪拉·甘地开放大学和印度远程教育委员会身处一个新的规划中，这一规划既
包括传统大学系统，也包括开放大学系统。我们为很多学院和大学都提供了支持，帮助他们
如何将开放与远程学习技术整合到教学和学习过程中，例如，一个科学老师如何利用开放与
远程学习技术改善课堂教学和学习过程，并让任何人、在任何时间、任何地点可以访问到课
堂。此外，我们还有国家太空研究系统。印度太空研究组织（Indian Space Research
Organization，简称 ISRO）可能也计划登月。我们需要进一步做规划，印度太空研究组织
也准备为教育和教育机构提供卫星、电缆服务。印度高等教育中的英迪拉·甘地开放大学和
开放大学系统，以及学校教育系统正在充分利用卫星。我们还有太空研究组织支持卫星教育，
我们正在帮助大量教育机构充分利用卫星，将教育传输到边远山区。

与中国开放大学系统相比，无疑，中国比印度更大、人口更多、地区差异大。但是我们
所面临的一个很大的挑战就是不同语言所带来的问题。我们现在有 20 种官方语言，还有上
百种方言。我们有 13 所开放大学，以及传统大学系统。这 13 所开放大学都用英语，但是
他们也有责任使用个别语言，目前英迪拉·甘地开放大学希望提供公共参与的教育，我们也和政府和非政府组织，以及调查机构合作，了解哪些知识、技能是这些地区所需的，从而利用不同的语言和方言提供这些知识和技能。确实这有一定的挑战，同时我们也有质量保证系统。我们建立了质量保证系统和国家评估标准。我们有国家评估与鉴定委员会（National Assessment and Accreditation Council，NAAC）对传统大学系统进行评估。我们还开发了对开放大学系统的评估，包括对材料开发、多媒体材料的开发、在线材料和卫星教育系统等的评估。

我们欣喜的看到中国开放大学系统所取得的成绩，让我们恭喜中国开放大学系统所做的出色工作，他们能够接受未来教育的挑战。

非常感谢！

问题：大概3年前，在北京召开的一次会议上，一个中国开放大学的朋友提出了一个问题，你们在用汉语方言教学，我的问题是，在中国的少数民族地区，例如，新疆、内蒙古，少数民族语言在教学中的应用现状如何？

回答：非常感谢Pilla教授的问题，您提的问题非常好，在中国，中央广播电视大学主要用汉语开展课程教学，但在少数民族地区，对于少数民族语言的使用，我们有一定的规划。例如，在新疆维吾尔族自治区，我们已经用维语和汉语进行双语教学三年了。目前，该项目进展顺利，也许今年或者明年，我们将在内蒙古进行试验，以及在朝鲜人聚集的东北地区用朝鲜语和汉语进行双语教学。

（黄复生校）
Flexible Learning Futures
Jim Taylor
Deputy Vice-Chancellor of
the University of Southern Queensland (Australia)

I want to highlight the first ICDE/ICCE conference that I went to in Vancouver in 1982. Some of you may have been there. The theme of the conference was *Technology is the Answer, But What is the Question?* Something that is still somewhat relevant today.

Because of time constraints, I want to concentrate on the financial exclusion divide that’s been referred to earlier. It is not just the digital divide that is a problem. There are a lot of people who have access to the internet, but who cannot afford the fees necessary to gain access to online higher education. They are the target group I’d like to suggest that we can work towards helping. I’m not going to talk much about the OpenCourseWare Consortium because many of you are familiar with it. But just this September, at the OpenCourseWare Consortium Conference in Utah, Christine Geith (Michigan State University, USA) and Philipp Schmidt (University of the Western Cape, South Africa), whom I am working with on a project, raised the question, “What might it mean to offer credit for open courseware?” The consensus reached by the Conference delegates was, “Everything!”

I think it is clear as a message in talking about “open courseware futures” that it is just a matter of time before some form of credit is offered to students who study conscientiously using open courseware. Christine, Philipp and I have prepared an application for funding from the Hewlett Foundation to establish three working teams on each of the approaches to credit outlined in the PowerPoint presentation, which also includes some reference to the continuing growth of the open educational resource movement and open source software. Further, the number of open access journals and the number of institutions offering open courseware is growing rapidly.

The logical extension of the open courseware movement is to move beyond content to providing open academic support, assessment-on-demand, varying the curriculum to what I’ve called open curriculum, and ultimately to awarding accreditation. My own university has registered the domain name for “Academic Volunteers International” and we are developing open source architecture to support the volunteers. Operating as *communities of practice* the volunteers will provide academic support for open courseware students. So that's one approach to managing the variable cost of providing academic support. We can’t, however, see an alternative way to provide access to assessment, without the open courseware students having to pay the variable costs associated with the assessment process. The business model underpinning the approach is summarized in this second last slide. The slide also provides a live link to a paper that I published last year, which refers to “Creating a Parallel Universe”. The approach is not aimed at undermining mainstream higher education, or challenging the existing business model. At the moment, then, we have learners who only have access to open courseware with no academic support and...
extremely limited opportunities for gaining credit. We believe that we could provide academic support by volunteers working in communities of practice by allocating a small amount of their time on a regular basis. There is a strong tradition in Australia of volunteering, and I’m sure that the proposed approach will work.

With academic support available, many open courseware students will achieve a state of readiness to be assessed. What is then required is some form of assessment-on-demand, similar to that provided by Athabasca University in its system of challenge examinations. That’s one of the things we are looking at, so that assessment and ultimately credit could be offered for a much reduced fee. It is important that the open courseware student has the opportunity to gain credit for a course. In this model, a number of participating institutions could work together to grant credit by offering perhaps just 5 or 6 open courses from each institution that could be put together to accumulate credit towards a degree. It would then be feasible for a student who couldn’t afford the fees for main stream access to higher education to qualify for the award of a Bachelor of Transdisciplinary Studies from the combined open courseware offerings from a number of universities working together.

The expertise, experience and tradition of collaboration based on the existing network of ICDE SCOP institutions could provide a practical foundation for granting an open courseware degree. The business model behind this is that we use the expertise and investment that we have already put into our mainstream courses. We make a selected number of these courses available as open courseware. We support them with academic volunteers. When students are ready to be examined, they should be able to pay a fee for assessment, which would be very much less than the course fees charged for the mainstream higher education experience. By implementing the proposed model, an ICDE SCOP network of institutions working together could enable many students currently excluded by the financial divide to gain an open courseware degree, without challenging the existing mainstream higher education business model.

I ask you to think about the future of higher education. The problems associated with providing sufficient access through conventional approaches to meet the growing demand seem insurmountable. It is clear that we will never be able to meet the exponentially growing demand with the existing systems of higher education. We need more innovation. We need to use the technology judiciously, and we need new business models. Will higher education ever become a viable universal aspiration, or will it remain a universal exasperation? Provided we work together to make judicious use of emerging technologies, and to develop innovative business models, in time ubiquitous access to higher education could become a universal reality. The first meaningful step we can take to tackle the challenge of providing affordable access to higher education on a global scale is to keep an open mind!

Thank you!
灵活学习的未来

澳大利亚南昆士兰大学副校长 詹姆斯·泰勒

非常感谢！

首先我想提及1982年在曼谷召开的首次国际开放与远程教育理事会（ICDE，当时为国际函授教育理事会ICCE）会议，你们中的一些人可能也出席了那次会议。会议的主题是“技术是答案，那问题是什么呢？”这和今天的主题仍旧有些相关。

由于时间有限，我想集中探讨之前提到的金融排斥鸿沟（Financial Exclusion Divide），这不仅仅是指数字鸿沟而涉及到一个难题。许多人能使用互联网但仍无法承担获得高等教育所需的费用，这正是我想建议大家共同努力来帮助的目标人群。我不想谈论更多有关开放课件协会（OCC）的内容，许多人对OCC都已经熟悉。我想谈及的是今年9月份在犹他州举行的开放课件协会会议上，和我正在合作项目的克里斯蒂·盖斯（Christine Geith）和菲利普·施密特（Philip Schmidt）提出的问题：“为开放课件提供学分将意味着什么？”克里斯蒂来自美国密歇根州立大学，菲利普来自南非西开普大学。关于这一问题的回答，与会代表达成的共识是“结论是可能发生的一切”。

在谈论开放课件的未来时，我想有一点很清楚，即要真正实现为那些想认真学习开放课件的学生提供相应的学分仅仅是时间问题。克里斯蒂、菲利普和我准备向休利特基金会（Hewlett Foundation）提出资金申请，以用于成立三个工作组分布实施PPT中描述的学分授予计划，其中也涉及正在不断发展的开放教育资源运动和开放源代码软件。此外，提供开放课件的开放存取期刊（Open Access Journals）和开放教育机构的数量也在迅猛增长。

按逻辑发展来看，开放课件运动的拓展将表现在从内容提供拓展为提供学术支持，提供按需评估，评估对象也从课程发展为课程的开放课程，并最终授予资格认证。我所在的大学已经为“国际学术志愿者”注册了域名，同时我们正在为这些志愿者研发开放源代码体系。如同社团实践活动一样，这些志愿者将为开放课件的学生提供学术支持，为此这是一种对不同类型课程的管理模式。尽管如此，我们仍不能设想出不用学习者通过缴纳相关费用来获得评估的可选方式。用来支持这种方式的商业模式在倒数第二张幻灯片中已经提及。幻灯片中还提供了我去
年发表的“创建平行世界”这一论文的链接。这种方式并不是为了破坏主流高等教育或者说挑战现存的商业模式。当前，我们的学习者只能获得开放课件学习而不能获得相应的学术支持，甚至几乎没有机会获得学分。我们相信参与社团工作的学术志愿者通过合理的时间分配一定能够为学生提供学术支持。参加志愿服务在澳大利亚已是一种根深蒂固的传统，我相信这种方式将会发挥很大作用。

在获得学术支持后，许多开放课件的学习者将会处于被评估的准备状态；那时就需要某种形式的个别化评估，类似于阿萨巴斯卡大学在其教学系统内提供的挑战考试。这也是我们看到的一种形式，因此评估和最终资格鉴定可以通过很少的付费而获得。有机会获得课程学分这对开放课件学生来说是很重要的。在这一模式中，众多参与机构共同努力，每个参与机构可以提供5或6门开放课程并准予学分，这些学分累积到一定程度可获得学位。这对于那些无力支付主流高等教育的，但有能力通过参与院校提供的开放课件的学习获得跨学科学士学位的学生而言将是可行的。

基于专业知识、经验和合作传统的国际远程教育理事会校长常设会议（ICDE SCOP）成员机构形成的网络将为开放课件学位授予提供实践基础。这背后运作的商业模式是在主流课程上使用的专门技术和投资模式，从中我们选取一定数量作为开放课件，并由学术志愿者提供支持。当学生准备参与评估时，他们应该能支付一笔费用进行评估，这笔费用要比主流高等教育的课程学费少的多。通过实施这一模式，由众多机构参与的ICDE SCOP网络能够为那些受金融鸿沟拒绝在外的众多学习者提供开放课程的学位，同时也不会对现存的主流高等教育模式带来挑战。

然后，我想请大家思考一下高等教育的未来。通过传统教育方式提供足够的教育机会及其他问题以满足不断增长的教育需求似乎无法解决。显然，现存的高等教育体系将无法满足呈指数级增长的需求。我们需要更多的改革创新，我们需要充分利用技术，我们需要尝试新的商业模式。高等教育是愿意被视为广泛的期待，还是维持一种引起全世界愤怒的状态？假如我们一起努力，充分利用新兴技术，开发创新的商业模式，无处不在的高等教育机会将在全球成为现实。在全球范围内应对提供负担得起的接受高等教育的机会带来的挑战，我们需要迈出的有意义的第一步就是保持开放的心态！

谢谢！

（李娟校）
The Challenges and Perspectives of Borderless Higher Education

Dr. Don Olcott, Jr., Chief Executive

The Observatory on Borderless Higher Education (OBHE)

and

Chairman of the Board, United States Distance Learning Association (USDLA)

Thank you very much. Distinguished guests, colleagues, and to our Chinese hosts’ here today, it’s a pleasure to be here. I’m humbled by your generous introduction given. There are so many leading presidents and vice chancellors gathered together. However, I must share with you that about four months ago, I was on the island of Corfu in Greece with a couple of colleagues of mine and we were having dinner. I was telling them about my upcoming trip to Shanghai to speak to the SCOP presidents and vice chancellors. One of them commented to me, ‘I’ve been waiting my entire career to be able to tell a room full of presidents exactly what I think.’ Anyway, it’s nice to with you in Shanghai.

Reflections – 1988: A Look Back to the Future

One of the things I would like us to do, recognizing you are all very very young, is to go back 20 years and reflect about where we were in this profession. 1988 was the origins of open and distance education as we know it today. But just think about the world in 1988, it’s pretty remarkable when you reflect about how far we’ve come in the last 20 years. At the same time, I was reminded of some my own experiences in distance education about 1988. If you recall, maybe some of you can relate to this, but I remember this time as the beginning of more and more journals of distance education. In some corners of the globe, associations began to arise around distance education. And there were very few professional conferences compared to today. In the U.S., at that time, there were three distance conferences, three. Today, there are probably 100 conferences related to educational technology and/or distance learning each year around the world. We also began to hear public assertions that distance learning can make money or at least save us money. And, most importantly, that distance learning can reduce faculty workload and free up time for other academic pursuits. Well, we’ve learned some lessons along the way. What I find interesting is that I think we may be at another critical crossroads for technology and the future of higher education.

Access: The Global Challenge

Indeed it was around 1988 that we began hearing that quintessential question: Is distance learning as effective as classroom instruction? I remember a president charging me with ensuring that our distance learning program would mirror the standards of our classroom instruction across the university. I said, “Are you certain that’s what you want to use as the standard Mr. President?” Of course, he was perplexed by my response. It is important to remember that our faculty’ were truly
autonomous and for anyone to question the quality of teaching was not in the public
domain. Faculty assessment was fundamentally a departmental oversight
responsibility laden with the typical politics and unwritten rules that govern the
academic organization. We presumed that regular classroom instruction must be high
quality, I have had faculty over the years who have engaged in distance learning tell
me that distance learning had made them better teachers. Why? Faculties began to
question their assumptions about the teaching-learning process and systematically
examine how their content objectives, student interactions, and assessment methods
contributed to better teaching and learning. In retrospect, I think we’ve made
incredible progress over the past twenty years. I also think we have some very real
challenges on the horizon to move forward in the global environment. Lets look at the
key driver in this new global higher education market: access.

This opening slide on access depicts what you already know. We have a lot of
people coming back to higher education. The number of eligible students is increasing
yearly. One of the last estimates was there will be 100 million eligible students in the
year 2010 and recently that estimate has increased to approximately 120 million.
Paradoxically, if these estimates are correct, why is it such an increasingly
competitive marketplace? Well, of course 120 million students don’t come back to
school at the same time. They have different reasons, varying family, employment,
and community responsibilities they must manage. The fact of the matter is the
number of learners out there is increasing certainly much faster than we could even
imagine accommodating by building new campuses. What role will open and distance
education play in the future in meeting this increasing global demand? I’ll return to
this question a bit later.

Playing on the International Stage: The Driving Factors

i. Financial factors

What factors are driving universities into global markets? First and foremost is
the need to secure additional revenues. University leaders have to look at the financial
aspect as one of the key considerations in going global. In sum, government
reductions in funding to higher education is driving institutions toward new ways of
securing alternative revenue sources.

ii. International language: English

We are seeing a gravitation towards “English” as the global language,
particularly in business and commerce. More and more universities across the world
are offering programs in English most notably at the post-graduate levels. This trend
has also served as a catalyst for increased levels of competitiveness of competition for
international students. It is not clear to me that this movement will continue over the
long-term or if there will eventually be cultural and social resistance to English.
Although there are valid reasons for business degrees to require English fluency for
international commerce, I do not believe we will see this same increase in the arts and
sciences, education, and other academic disciplines. For example, there is a private
business school in France called ESC Lille where all the masters’ and doctoral
programs are taught entirely in English. These type of institutions are, in fact, competing with traditional Anglo universities for international students. The historic English speaking countries like the U.S., UK, and Australia are now seeing their foreign competitors remove one of the traditional Anglo competitive edge factors.

iii. Diversification and increase in international student mobility

We are seeing one result of the interconnectedness of a global society and economy by the diversification and increase in international student mobility. Students believe having a study abroad experience and/or some international experience as important to their portfolio for future employment after university. Students today are also simply more adventurous in exploring global learning experiences and engaging in the benefits of travel, exposure to new cultures, meeting new friends, and living in another country.

iv. Workforce needs – skills migration

Obviously, workforce needs and skills migration is a priority for many governments to attract a highly talented workforce for the future. Many of you are familiar with the Bologna Process in Europe. This mobility model is driven by a reciprocal recognition of credentials and skills that will allow today’s students, who are tomorrow’s workforce, to move seamlessly across international borders for employment. The Bologna model is being considered in other regions of the world for facilitating the mobility of the labor force to meet national demands for high skill labor. There is no question that this model will increase in the future. It will become a competitive edge for nations who can attract workers to meet critical labor shortages and needs.

Trends in Global Cross-Border Higher Education

i. Host nations are becoming more selective of entering foreign providers

What are some of the key trends in cross-border higher education? First, host nations are becoming more selective of entering foreign providers. I think this has been happening probably for about the last four years. Certainly China has become a bit more selective in the kinds of institutions and partnerships allowed into the country. This trend is occurring in other regions of the world and is likely to increase in the future. The important questions for you are what kinds of partnerships are in the best interests of your university? Who do you want to compete with in the global market? Who don’t you wish to compete with in this arena? And finally, what competitor institutions can you effectively compete with to ensure future success? In sum, you will have to assess the competitive attributes of your institution in the global market and adapt accordingly to changing economic and market demand circumstances.

ii. Cross-border research exchange is a rapidly growing priority among nations

Cross-border research exchange is also an essential component of international partnerships between nations and universities. Institutions that can combine academic
programmes and research exchange into their partnership formula will be well positioned for the future. I should also mention that quality assurance agencies are engaging in broader oversight of cross-border higher education programs and are paying more attention to what institutions are doing abroad.

iii. Emerging hosts and sources

This slide provides a general visual graphic of cross-border activity across the globe. Host nations are those that have foreign providers located in-country. Source nations are those that deliver programs into another country. During the past five years, most of the cross border growth has occurred in East Asia and the Gulf states. Unsurprisingly, the three countries that deliver the most across-border higher education are the UK, the U.S., and Australia. These three nations also have the largest foreign student populations. However, this global landscape is changing and we are seeing a new regionalism emerge across the globe. This means more and more students are considering study abroad within their region and institutions are exploring more partnerships with their sister institutions in the region.

Defining the Global University

One view of what it means to be a global university has been presented by Vice Chancellor Eric Thomas of the University of Bristol. Professor Thomas argues that a global university has global brand penetration, it has comprehensive excellence in research, teaching, academic staff, it is engaged in global research, it delivers programs abroad, it has many foreign visitors on its campus, and it impacts global issues and policy formation. Of course, not every institution can do all these things. If we agree with this model then only large, comprehensive research universities can truly be global universities. In some respects this is an elitist and rather narrow view of the global landscape. With the many global issues this planet must resolve, we need many players on the international stage. Leaders need to determine the global role of their own institution and engage in activities that reflect the academic strengths of the institution. And maybe this is the easiest way to suggest to all institutions if you don’t know where you’re going, it really doesn’t matter which path you take. As former U.S. president Dwight David Eisenhower once said, ‘the plan is nothing, planning is every thing.’

Given we have a broader understanding of the factors and drivers of the new global higher education market, the question I pose to you is this. Why has the level of global distance learning failed to keep pace with the broader progress of educational technology? Given the progress we have made with technology over last 20 years, it would seem plausible that we would be seeing an increasing amount of global distance education in today’s global market. This is not the case. Why? What are the barriers to global distance learning? Let’s take a look at some of these.

The Global Distance Factors

i. The credibility of “real people” and choosing for the best learning practices

When you spend a lot of money for technology, for research, for academic programs, having ‘real people’ on the ground seems to carry some credibility. Another possible
reason is the limited research base for addressing the interconnected impacts of online learning, language and culture. I don’t know if we really know very much about what is ‘lost in translation’ when online programs in English are delivered to non-native speakers of English. When I talk to faculty about teaching international students they often tell me about the miscommunication that goes on in the face to face classroom. The next question, of course, is then what happens in online environment where content is delivered in English? I think we need to take a more empirical look at this process.

ii. Technology is not culturally neutral

Technology is not culturally neutral. We know that technology can be very threatening to culture, to language. How do we find ways to communicate that is not the intent, even though sometimes that maybe an intentional consequence in some way? I believe it was two years ago in Thailand, they limited the number of programs delivered in English. Why was this done? In Thailand, as in many other cultures, language and culture are intimately connected. The increasing number of programs in English was perceived as a threat to the language and to the culture. Now, those are not the kinds of issues we necessarily talk about and grapple with every day. But I think they are issues we must talk about in a global environment of partnerships where language and culture are critical issues in the delivery of higher education.

iii. Digital divide

There is a growing disparity between the haves and have-nots in terms of free and easy access to technology. We can break it down by developing or developed countries, we can break it down by rural and urban and by age and gender. We can go on and on and on. Access to programs is irrelevant if potential students lack the basic access to the technology tools, infrastructure, and support services to support their learning.

iv. Funding or redistributing resources to conduct research in international distance teaching

It’s amazing how many conferences I’ve been to on distance and open learning and I heard keynote speeches address distance learning potential as if everybody was wired by Bill Gates and had everything they needed technologically. And I’m talking about conferences where half of the participants were from third world countries and developing countries. To them, the issue of access isn’t about the students being able to take online courses, the issue here is to have reliable, low-cost technologies to get to the content. So, you know, what means one thing to us at times it means something different to others. And for some institutions, doing some of these things, particularly in challenging economic times, means making difficult financial decisions. Are you willing to redistribute resources to engage in research that looks at these cultural and language barriers to online learning? If you are going to serve students online in international markets, these are not easy questions and I certainly have no definitive answer to offer you. We have competing interests for resources within the university.
This competition for resources thereby requires leaders to make difficult decisions about what gets funded and what doesn’t.

Strategic Considerations for Institutional Leaders

i. Articulating clearly that international distance education initiatives align with institutional mission and strategic goals

   Global distance learning requires leaders to clearly articulate how these initiatives align with institutional mission and goals. For you, in this room, who lead stand alone open and distance learning universities, that’s probably a given, but I assure you in the rest of higher education it is often an afterthought by some leaders. In fact, at times it is fascinating to see how quickly distance education was marginal on Friday but became very important by Monday to respond to a potential global initiative.

ii. The instructional design formats of distance teaching should respect language, culture and social norms of foreign students

   Aligning distance teaching with instructional design formats that compensate and respect language, culture and social norms is a critical barrier to global online learning. I’m not suggesting that we haven’t done work in this area. There has been excellent work done by some institutions yet generally these issues have been overlooked.

iii. Developing a risk management strategy for major international open and distance learning endeavors.

   It never ceases to amaze me how truly great universities are at creating things, research, partnerships, academic programs, and the list goes on and on. What universities are usually notorious at is their capacity for getting out of partnerships. How do you get out of a partnership that’s not working? How can you say, oh well, we thought this would be a good partnership for many positive reasons? Perhaps no one is fault but the partnership is not working and the irony is that the only response sometimes is for more resources to be expended in an effort to save an initiative.

   So what do you do? The answer is an exit strategy needs to be talked about from the outset. The problem, of course, is that when you have opening discussions, everyone wants to be positive and gracious and what to do if the partnership isn’t working is left out of the discussions. Indeed, this is only natural but I think you have to find ways to have discussions about those kinds of difficulties and challenging questions. What if it doesn’t work out the way we planned? How do we remove our organization from the partnership, learn from the process, and move on? Why can you do it better than your competitors? Again the competitive questions you need to ask are these. Who do you want to compete with? Who don’t you want to compete with? And, perhaps the most important practical question is what organizations can you compete with successfully?

iv. Enlightenment of a little story: How can you do it better than your competitors?

   Perhaps a story often told by Sir John Daniel, President of the Commonwealth of
Learning, will illustrate this competitive challenge. Given we are being hosted by our colleagues here in Shanghai, I’ll use a Chinese metaphor and call this the crouching tiger story. Two gentlemen who come out the jungle glance back to see a tiger is chasing them. As they start running away, one of the gentleman says ‘there’s no way we can out-run that tiger’. The other gentleman glances over his shoulder at his friend and says ‘oh I’m not trying to out-run the tiger, I’m just trying to out-run you!’

Who do you want to compete with and why? And the competition issue is only part of the challenge. There is also the partnership issue. Who are you going to partner with? What are the characteristics that you are looking for in your potential partners? Are you interested in short-term or long-term partnerships? The criteria for these may be different. So, again, the competitive issue is an important one. Who do you want to compete with and why and how can you do this effectively?

The Future

i. The global distance learning landscape and market will expand exponentially

The future for global open and distance learning, as I said earlier, is wide open. I think it is very interesting that in a 20 year period we’ve almost come full circle, and open and distance education is once again in a very strategic position to move higher education forward. Today, there are different reasons for this and one is simply that someone went and invented the Internet. This transformation has changed the way we do everything from education, banking, and insurance to entertainment, personal relationships, and travel. We truly do live in cyberspace on a daily basis.

ii. Maintaining the focus on effective teaching and learning

We also have an important responsibility for maintaining the focus on effective teaching and learning rather than the technologies. Perhaps this sounds a bit obvious and yet we have forgotten this at many junctions along our journey. I would also acknowledge to you that the scrutiny faced by distance educators about academic quality, effective learning and removing the primacy of the faculty member from the teaching and learning process is not only unwarranted, it is simply not true.

We have a substantial body of research that has shown clearly that distance learning is as effective as face-to-face classroom instruction and that students perform equally well academically. Do any of you ever remember having arguments in the 60s and 70s about whether faculty were using overhead projectors or chalk boards? These were the technologies of teaching and learning and yet we called them teaching aids.

The technologies of open and distance learning empower learners across the globe and provide access where access otherwise would not exist for learners. We need not apologize or make undue claims about the potential of our profession. We simply need to embrace our profession and educate others on the tools of our trade. Remember, being challenged at times is good for all of us, for our students, and for our profession.

iii. Engaging in partnerships with the right partners
As I shared earlier, universities must also assess their research capacity along with the academic programs they can offer globally. We must engage in partnerships with the right partners. I believe this is one of the biggest challenges we will have in the future. In conclusion, and as Henry L. Mencken once wrote, ‘for every complex problem there is a simple solution and it’s wrong! I wish you well on your journey. Thank you!

Response and remarks

Remak1 [Pranee Sangkatavat, President, Sukhothai Thammathirat Open University]:

Thank you! Mr. Chairman, executive ICDE committee, President and vice-chancellor from open and distant university and dear friends. I feel very much honor to have joined this conference and I am just appointed to be the fifth president of STOU a couple months ago, So, I was just new. (I just know that I have to respond for this presentation when I step on the bus). Anyway, let’s get back to the presentation. First of all, I’m very impressed with Dr. Don’s presentation with you look back and look forward for the future, for global open and distance learning. Let me talk a little bit about Thailand, especially about my open university and I will ask you a few questions according to your presentation. In Thailand, I may say, 30 years ago, we have the real boundaries. Higher education was established with the establishment of STOU (Sukhothai Thammathirat Open University). Before 1978, all higher education in Thailand was classroom-base university. STOU then was established to open to border of classroom, to the working people who do not have opportunity to enter to the university. Besides, these groups, we also serve a specific group, such as the leader from the religious all to our country. And also, the worker from the industrial even though the prisoner, so, we serve a variety group of people. OK, anyway, up until now, STOU was produced more than 300,000 graduates to serve the nations. However, due to the development of the new technology, such as information and communication technology. We are challenging by the penetrating, information and communication technology and by the global languages. I mean the English. It is also our real barrier, OK, and the different culture between western and eastern is also need to be justified. In this case, can you suggest me how to overcome these issues?

Response (Dr. Don Olcott, Jr.):

We have opened up dialogues and leadership institutions need to truly define what the overall international strategy is. Let me explain what I mean, Mandam. The US has 4,130 colleges and universities. I know about 10 million students, less than 1 percent of American students study abroad, 1 percent. And there is a president in anyone of those institutions in America who isn’t going out publicly and saying we need internationalized curriculum, we need to prepare global students, and we need to do all these kinds of things which in ways some hypercritical if you ask me, and so, I think what we need to do is…and I just use that as an example. It’s not a critique of American higher education. It’s just again…it were the right interaction you don’t lie up and I think we need to open up dialogues with our international students. One of the things I will share with presidents who are trying to recruit lots of international
students to the personal question I will used to ask is: Are you prepare to spend the money and use the staff necessary to ensure that you can provide support services to those students when they are on your campus? And it’s amazing how many answers I don’t care. I mean he just look at me like as this silly question. So, I think we need to teach each other about each other’s culture, each other’s languages. I, myself, am a bit concern about this push to global English, I mean certainly it makes cities here a times, go places, and do things. But what we are loser on that? I mean I love other languages; I’m a language person, so I happen to…but I just wonder if we ever take the time to think about what we may lose in this process that we think would be so creative by moving forward. And I think in the same win we need to stop long enough to have dialogue and talk about these issues across eastern and western cultures. 

Remark2: (Professor Helge Hoivik, Oslo University College):
I would like to give a brief comment on that. Since last summer we conducted the first summer school with participants from many different countries including China and Sudan. And one of the amazing experiences was to define the courses mostly the linguistic from the outside. Using all the available materials on the internet in the various personal in Norwegian English but also all the languages. And at the same time, using the automatic translation mechanisms now available. So that, the entire course material could be translated into a rapidly port of Sudanese participants into Chinese for the Chinese participants by the click one button. Now, the quality of the translation, you know, is on the high level at this stage, but that will improve in next five to ten years. So, it was more a conceptual issue, to define the learning environment as having more multiple languages, so that the word faces at the same time. Thank you!

Remark1 (Pranee Sangkatavat):
Even though, right now in Thailand, we put English course to be our compensatory course for primary and secondary school level, but still, you know, English is thinking to be a great barrier for us to be global to learn internationally. But we use English as, you know, a media for learning.

Remark3:
I really take back to the also ICDE conference 1988. I don’t think that one as many as in this room. I usually think that’s a nice experience. Dr. Berry, they found that open university in Britain, organized in Saedeglu. Not on that mean program of the agenda of the conference. He showed us an experiment, this is why I want to speak about it. It was at that time a cold war. It also organized between the MIT in the United States and the University of Beijing in China. How can you give a classroom on technological subject being the satellite was, at that time, a new invention? How you can use satellite and have an interactive Chinese students. Here is the lecture going mantic only with the help of Chinese professor. The second experiment was to get a Chinese professors give their lecture to the MIT, American students on mainly. The answer was you have to care even in technology for local needs, local mentality, language problems, things like this and it didn’t work. This is just a reflection on the reflections.
无国界高等教育的挑战与前景

无国界高等教育观察组织执行主任与美国远程教学协会董事会主席 唐·奥尔科特（美）

尊敬的各位嘉宾、各位同行以及我们的东道主，大家好！能来这里我感到非常高兴。刚才对我如此慷慨的介绍令我感到愧疚，因为今天有这么多的校长、副校长聚集在一起。但是我必须和大家分享的是大约四个月前，我和几位同事去在希腊的科学岛上聚餐，我跟他们说我要来参加上海的这次会议，并在开放教育大学校长常设会议上为校长们做报告。他们中有人对我说：“在我的整个职业生涯中，我一直期待着能在校长云集的会议厅里把我的真实想法告诉大家。”不管怎样，我很高兴能和大家相聚上海。

一、反思 1988 年：回顾过去展望未来

首先，我想和大家一起把时间倒退到 20 年前，那时的我们都非常年轻，请各位回忆一下当时我们的事业处于何种情形。我们都知道，1988 年是开放与远程教育开始的一年。但当时我们若细想一下 1988 年的世界就会发现，20 年之间我们所取得了极大的进步。同时，这让我想起了 20 年前自己在远程教育领域的一些经历。如果你回忆一下，或许你们中的某些人也有与我相似的经历。但我记得在这一时期，越来越多的远程教育杂志开始创办。有关远程教育的协会在世界的某些地方也开始建立了。而在今天，全球每年都有近上百场有关教育技术或远程学习的会议。我们也开始听说一些远程学习能够赚钱或者至少为我们省钱的公开论断。并且更加重要的是远程学习能够减少在职人员的工作负担，能有空闲的时间来实现学术追求。当然，我们在这一过程中也吸取了不少经验与教训。我发现比较有意思的是，在我们当时可能正处于科技与未来高等教育发展的另一个关键的十字路口。

二、受教育权：全球性的挑战

事实上，大概就在我 1988 年我们开始听到这样一个经典的问题：远程学习与课堂教学同样有效吗？我记得一个校长曾指责我并让我保证远程学习计划将会反映大学课堂教学的标准。我说：“校长，您真的想把它作为标准吗？”当然，他被我的这个回答弄得不知所措。非常重要的是，我记得我们的教工是真正自治的，并且在非公共领域内，任何人都可以对教学质量提出质疑。教师评价根本上就是部门的监督职责，通过各种象征性的政纲和未明文的规定来管理学院机构。我们由此推测常规的课堂教学标准是高质量的，在那些年进行远程学习的教师告诉我，远程学习使他们成为了好教师。为什么？教师们开始质疑他们关于教学过程的设想，并系统地考察他们的教学目标、学生互动、评价方式对提高教学是如何起作用的。回顾过去的 20 年，我认为我们已经取得了巨大的进步。同时，我认为在全球化环境下，远程学习在向前推进的过程中还面临着一些非常重大的挑战。让我们一起审视在这个新的全球高等教育市场中的关键驱动力：受教育权。

第一张幻灯片中关于受教育权的描述大家都已经了解。我们有很多人回来接受高等教育。
三、走向全球：大学的驱动因素

(一)经济因素

是什么因素把大学推向全球市场呢？首先是保证额外收入的需要。大学领导们必须将财政方面看成是大学走向世界的关键因素之一。大体上，政府减少对高等教育的投入正促使高等院校寻找其他经济来源的新方式。

(二)国际性语言：英语

其次，大家都知道，英语是国际通用语言，尤其在商业活动中。世界上越来越多的大学都在开设英语课程，最为显著的是在研究生课程中。这种趋势也已作为增加留学生竞争力和竞争水平的一种催化剂。我不清楚这种运动是否将长期持续或者它们最终是否会对英语产生文化与社会阻力。尽管有一些合理的理由要求获得商学位的学生有流利的英语来进行国际商务活动。我不相信在文理科、教育学及其他学术性科目上也会让我们看到同样的增长。例如，在法国有一个名为里尔高等商学院的私立商业学校，在那里，所有的硕博士课程都是全英语教学的。事实上，这种类型的大学正与传统英式大学竞争留学生。历史上重要的英语国家例如美国、英国和澳大利亚正在看着他们的外来竞争者移除传统英式的竞争优势因素。

(三)留学生流动性的增强及其多样化

我们见证了由于留学生交流的增加与多样化带来的全球社会与经济相互联系的结果。学生们认为，有一种国外留学经历或者一些国际交流经历对于他们在大学毕业后就业是非常重要的。如今学生在探寻国外学习经历、参与国际旅行、暴露新文化、遇见新朋友以及在其他国家生活方面更加喜欢冒险，敢做敢为。

(四)劳动力需求及技术迁移

显然，劳动力需求和技术迁移是未来许多政府在引进未来高水平人才和劳动力方面是优先考虑的。你们中的许多人都熟悉欧洲博洛尼亚进程，这种迁移模式是受证书和技能方面的相互承认而推动的。它将允许今天的在校生及学生（明天的劳动力）顺利地跨过国界去进行就业。博洛尼亚模式正在为世界其他地区所考虑来加速劳动力的迁移，从而满足国家对高技术劳动者的需要。毫无疑问，这种模式在将来会增加。对于那些能够引进劳动者来满足严重的劳动力短缺与需要的国家来说，这将成为他们的竞争优势。

四、全球跨边界高等教育的趋势

(一)东道国对国外课程提供者更加挑剔

跨界高等教育的关键趋势有那些呢？首先，在国内提供教学课程的外国提供商的审批
与选择正在变得更加挑剔。我想这大概也就是最近四年的事情。其中之一就是中国，中国现在对寻求合作伙伴的开发机构的选择也越来越严格了。这种趋势在世界的其他地方也正在发生而且在将来还可能会增强。重要的是，什么样的合作伙伴是你的大学最大利益？你想和谁一起在全球市场中竞争？在这个领域你不想和谁一起竞争？最后，你将不得不评估你的大学在全球市场中的竞争力，并根据经济和市场需求状况的改变而相应地进行调整。

二、跨国研究交流快速成为各国大学的首要任务

国家之间，大学之间的跨国研究交流也是国际合作的一个不可或缺的部分。将来，那些能够把学术计划与研究交流结合起来并成为他们的合作规则的机构则会占据有利位置。我已经提到中国也在关注国外的研究机构正在做些什么。

三、新兴的东道国与来源国

这张幻灯片中的概览图为大家形象地说明了全球高等教育机构的跨国活动情况。东道国是国外课程的进口国，而来源国则是课程的出口国。在过去的5年间，大多数的跨国交流增长发生在东亚和美国的墨西哥湾延岸各州。不足为奇的是，英国、美国和澳大利亚三个国家输出了绝大部分的跨国教育课程，他们拥有最大的外国学生人数。但是，这个全球前景正在改变，我们正在见证一个新的区域政策在全世界的诞生。这意味着越来越多的学生正在考虑在他们所在的区域内留学，同时高等教育机构正在与区域内的姊妹机构开拓越来越多的合作伙伴关系。

五、全球大学定义

布里斯托尔大学的副校长托马斯为全球大学下了定义，他认为全球大学有着全球性的品牌渗透力，有着全面而又出色的研究、教学、专业人员，致力于全球性的研究，向国外输出一些课程，有许多外国游客参观校园，对全球问题和政策形成产生一定的影响。当然，并非每个机构都能完成所有这些事情。如果我们赞同这个模型的话，那么只有那些大的，综合性的研究型大学才是真正的全球大学。从某种程度上讲，我们考虑到这也是一种“杰出人物统治论”的观点，而且也是对全球视野的一种相当狭隘化的理解。因为有许多全球性问题需要去解决，在国际舞台上，我们需要许多“表演者”。领导者们需要确定他们自己机构的全球性角色，同时也要参加一些能够反映他们机构的学术实力的活动。如果你不知道你要走那条路的话，可能这就是对于所有机构来说最简便的一个方式，而你选择那一条道路则无关紧要。正如美国前总统艾森豪威尔所说，“计划是无关紧要的，计划的过程才是一切”。

假如我们对于新的全球高等教育市场的因素和推动者有了更广泛的理解的话，那么我想问大家一个问题——为什么全球远程学习的程度跟不上教育技术的大跨步前进的步伐呢？由于我们的教育技术在过去的20年里取得了长足的进步，我们似乎非地看到，在今天的全球市场中的远程教育的份额也在日益增加。然而，事实并非如此。这是为什么呢？全球远程学习的障碍是什么？下面，我们来看看几个因素。

六、全球远程因素
(一)“真人”的可信度及最优学习实践的选择

当你为了技术、研究、学术项目花了很多钱的时候, 现场“真人”看起来好像意味着某种可信度。另一个可能的原因就是关于在线学习、语言与文化之间的相互影响的有限研究基础。我不知道是否我们真正的了解在英语网络课程传送给非英语国家的学习者时所产生的“翻译中的失真”现象。当我和我的教职员工谈论有关留学生教学的时候, 他们经常讲到面对面的课堂教学中所发生的“错误传达”的问题。下一个问题, 当网络学习环境中的所有内容都是用英语表达的话, 那么又将会发生什么事呢？我想，我们需要以更加经验化的方式来看待这一过程。

(二) 科技不具有文化中立性

科技并不是文化中立的。我们知道, 科技会对文化、语言造成很大的威胁。尽管有时候从某种程度上说这种威胁是一种带有目的性的结果, 但我们如何才能找到一种交流的方式来说明这种威胁实际上不带目的性的呢? 我相信泰国在两三年前就限制了英语授课课程的数量。为什么要这样做? 在泰国, 正如其他国家一样, 语言和文化是紧密联系在一起的。他们感觉到用英语教授的课程数量的持续增长会对他们自己的语言和文化造成威胁。那些并非是我们每天必须讨论的和解决的问题。然而，在全球合作的环境下，语言和文化成为了高等教育过程中的关键问题，因此，我认为它们是我们必须要加以讨论的问题。

(三) 数字分配

能够自如简捷的拥有科学技术的国家和不能这样做的国家在对技术的拥有上的差别越来越大。这种科技方面的差异，我们可以通过发达国家与发展中国家之间的努力消除它, 我们可以通过城乡之间的努力消除它, 我们也可以通过年龄与性别的努力消除它。我们可以持续不断的这样做。如果有潜力的学生们无法使用科技工具、基础设备以及为支持他们学习提供的服务，那么学习课程就是无关紧要的。

(四) 开展国际远程教学研究的投资或资源的再分配

令人非常惊异的是，我参与过的许多关于远程与开放学习的会议中，我所听到的关于远程学习的潜力的演讲就像所有的人都被比尔盖茨用金属丝连接了起来, 好像他们需要的任何一样东西都要藉由科技来完成。而且我所上面谈到的“会议”的参加者几乎有三分之一来自第三世界国家和发展中国家。对于这些国家来说，问题并不在于学生有没有能力学习网络课程的问题，而是他们是否有机会利用可靠、低廉的技术获得学习内容的问题。因此，对于我们来说有着某种含义的事情对于其他人来说却有着不同的含义。而且，对于某些机构来说，尤其是面对经济时代的挑战时，利用科技的问题就意味着要做出艰难的财政决策。你愿意把资源再分配到那些有关“文化和语言是在线学习的障碍”的研究上去吗？如果你将要在国际市场中提供给学生在线服务, 那么这些就不是简单的问题, 而我, 当然也无法给大家确定的答案。我们对于在大学之间争夺资源有着浓厚的兴趣。这种对资源的竞争也因此要求领导者在“什么能和什么不能带来资金”方面做出艰难的选择。

七、机构领导者的战略考虑

(一) 清晰说明与机构使命和战略目标相一致的国际远程教育行动

全球远程学习要求领导者清晰说明远程教育行动是如何与机构使命和目标相一致的。
于在座各位开放和远程学习大学的领导者来讲，这可能是一个已知的问题，但是我相信这也会引起高等教育的其他领域的一些领导者的再思考。事实上，有时候我们看到远程教育在星期五是不重要的但到了星期一很快又对潜在的全球行动做出回应从而变得非常重要，这是一件非常吸引人的人事。

(二)远程教学的教学设计形式应该尊重语言、文化和外国学生的社会规范

对于全球在线学习来说，教学设计形式要均衡并且要尊重语言、文化和社会规范这是一个关键性的障碍。我并不是说我们在哪一方面没有做出过努力。有些机构已经做得相当出色了，然而总体来讲这些问题还没有被注意到。

(三)为重要的国际开放和远程学习的努力开发风险管理策略

大学在创造、研究、合作、学术项目等等许多方面都是多么的优秀，这向来让我感到震惊不已。大学做的不好的地方通常是它脱离合作伙伴关系的能力。你如何脱离一种不再起作用的合作伙伴关系？你怎么能说：“本来我因为由于各种积极的原因这会是一种好的伙伴关系。”？可能，任何一个人都没有错，但是伙伴关系已经不再起作用了。具有讽刺意味的是唯一的回应有时只是针对为了保留主动性而消耗更多的资源而做出的。

所以你该怎么做？答案就是从一开始我们就需要讨论一种策略的存在。当然，问题是当你身处一个开放式讨论的时候，每个人都想要表现的积极、亲切。那么当这种合作伙伴关系不再发挥作用的时候你怎样才能从讨论中抽身而出呢？确实，这是很自然的，然而我想你应该寻找一些方式来讨论一下这些困难和具有挑战性的问题。如果它没有按照我们计划的方式运行，我们怎样让我们的组织脱离伙伴关系，从这个过程学习，然后继续前进？为什么你能够比你的竞争者做得好？同时，你需要在这里问的一些竞争性的问题是——你想要和谁竞争？你不想和谁竞争？可能最重要的实际问题是你能成功地和什么样的组织竞争？

(四)一则小故事的启发：你如何比你的竞争对手做得更好？

约翰·丹尼尔先生——英联邦学习共同体主席经常会讲的一则小故事或许可以阐明这种竞争性的挑战。既然我们来到了上海，那么我想借用一个叫做“蜷缩的老虎”的中国寓言故事来加以说明。有两个绅士正并肩前行，其中一个无意中向丛林中瞥了一眼并看到了一只老虎正在追赶他们。两个人赶快跑了起来。其中一个说：“我们没办法跑过那只老虎！”另一个人瞥了他的朋友一眼说：“我没想跑过那只老虎，我只是尽力跑过你！”

你想要和谁竞争？为什么？同时，竞争的问题只是挑战的一部分。与此同时还有合作伙伴关系的问题。你想要和谁合作？你寻找的潜在合作伙伴有着怎样的特点？你对长期合作感兴趣还是对短期合作感兴趣？标准是不同的。所以，我再次强调竞争问题是一个非常重要的问题。你想要和谁竞争？为什么？你怎样有效地做这些事？

八、未来

(一) 全球远程学习前景和市场将会大幅度扩大和拓展

正如我所说，全球开放和远程学习的未来一片光明。在 20 年的时间里，我们几乎走完整个一圈，开放和远程教育再一次站在了高等教育前面的战略位置上，这是非常有趣的。现在有各种不同的原因可以用来解释这件事，其中一个非常简单的原因就是有人发明了因特网。这项改革改变了我们做的事情方式，从教育、银行业、保险业到娱乐、个人关系和信息
的传播。我们确实生活在一个建立在日常生活基础上的电脑空间中。

(二)连续将注意力放在有效教学和学习上

我们还有一项重要责任就是要把注意力放在有效教学和学习上而不是科学技术上。可能这听起来是显而易见的，然而我们在我们的“旅途”中的许多“交叉点”上将这一点忘记了。同时，我也想告知大家，远程教育者关于学术质量、有效学习、和消除教职员工在教学和学习过程中的首要地位的审查是未获承认的，简直就是错误的。

我们有一个研究的实质部分清晰表明了远程学习和面对面的课堂教学一样有效，学生在学业上也有着同样好的表现。不知在座各位有没有人记得在六七十年代的时候有一个有关教师要使用放映机还是要使用黑板的争论。这些都是教学和学习技术。迄今为止，我们都称之为教学辅助手段。

开放和远程学习能够使得学习者“穿越”整个世界，并且能为学习者提供别的地方不能提供给他们的访问入口。我们不必为我们的职业潜能感到抱歉或做出不适当的要求。我们仅仅需要信奉我们的职业并用我们的商业工具去教育他人。请记住，不时地接受挑战对于我们所有人来说都是好事。我们的学生，还有我们的职业。

(三)致力于与合适的合伙人建立伙伴关系

正如我上面所讲到的，大学必须评估他们的研究能力和他们能提供的全球性的学术课程。我们必须致力于与合适的合伙人建立伙伴关系。我相信这是我们将来会遇到的最大挑战。总而言之，正如亨利•麦凯恩以前所写的：“每一个复杂的问题都有一个简单的解决方法,但它是错的！”祝愿你们在旅程上一切顺利！

谢谢！

评论与回应:
评论：(布兰妮·桑卡塔维特(Pranee Sangkatavat)，泰国苏可泰开放大学)：
非常感谢！主席先生、国际远程教育会议的执行委员会以及来自开放大学与远程教育大学的校长们，特邀官员及各位亲爱的朋友们，大家好！能够参加这次会议我感到非常荣幸，几个月之前，我刚被任命为泰国苏可泰开放大学的第五任校长，所以，在各位面前，我还是新人，请多多包涵！(就在我踏上车的时候才得知我要给这个演讲做出回应。)

让我们回到今天的演讲上，首先，唐·奥尔科特博士演讲给我留下了深刻的印象，您首先回顾了全球开放与远程学习的过去，然后又展望了它的未来。下面请允许我来谈一下泰国的情况，尤其是我所在的苏可泰开放大学，然后再根据您的讲演提一些问题。可以这么说，30年前的泰国存在真正意义上的边界。高等教育是随着苏可泰开放大学的创办而开始建立起来的。1978年之前，泰国所有的高等教育都是基于课堂教学的大学，后来苏可泰开放大学建立了开放教室。这些教室为那些没有机会进入大学学习的劳动者提供学习的场所。我们不仅为这群人服务，还为一些特定的团体服务，例如全国的宗教领袖、来自工厂的工人甚至是囚犯。所以，我们为各种各样的人服务。一直到今天，我们的开放大学总共为国家培养了30多万名毕业生。然而，由于新科学技术的发展，例如信息与通信技术，我们不仅受到了信息通讯技术的挑战，也受到了国际性语言——英语体系的渗透。我们也有自己的现实阻碍，比如东西方文化差异需要加以正视。针对这种情况，您能否给我提些建议来克服这些问题?
吗？

回应（唐·奥尔科特）：我们前面已经展开了关于此问题的探讨，其中一点就是需要领导机构界定真正的整体国际战略是什么。下面我来解释一下自己对此的理解。美国现有4130所高校，大概1000万学生，其中仅有不到1%的美国学生在国外留学。但我们却不知道有哪一位美国校长敢站出来公开发表言论说我们需要国际课程，我们需要为国际学生做准备，我们需要做与此相关的所有事情。如果您一定要问我们需要做什么，我认为我只是把它当作一个例子，这并非是对美国高等教育的批评，它只是一种正确的交互关系，您没有必要对此隐藏什么，我们需要做的就是开展与国际学生的对话与交流。对那些想要大量招收国际学生的校长而言，我想与大家分享一个我经常问的问题：从那些国际学生踏入您的大学校园之日起，您有没有准备好投入足够的资金与教师来保证对他们的服务质量？而在座的各位也将会吃惊的发现我对他们的许多答案都很不以为然。我的意思是他们会认为我提出的问题很愚蠢。而我的观点是我们的教员需要相互教授彼此的文化与语言。就我自己而言，我比较关心英语这一全球语言的推行问题。因为我们的城市只有在稳定的环境下才能发展，我们个人在一个有共同语言的环境里才能顺利出行，也才能做自己想做的事情。在这个语言的推行过程中，我们失去了什么？我热爱其他民族的语言，我是一个使用语言的人，我只是想知道我们在此过程中将要失去什么，假如我们在前进的道路上就会有所创新了。而且我也认为在前进的过程中我们需要留下足够的时间展开对话并讨论有关东西方文化的问题。

评论2（Professor Helge Hoivik，奥斯陆大学学院 (Oslo University College)）：
我想对您的发言做一个简短的评论。自去年夏天开始，我们开办了第一期暑期学校，参与者来自世界上各个不同的国家，包括中国和苏丹。其中最令我惊讶的经历就是要从外部界定课程的语言问题，并且使用互联网上可利用的所有材料，它们有很多的语言版本，不仅包括挪威式的英语这一种语言，还有其他的语言。不过，现在我们可以利用自动翻译器了。所以，只要您按一下按钮，整个课程资料就会自动译成您所需要的语言，例如，苏丹学习者需要苏丹语，中国学习者需要汉语，语言自动翻译器就会按照您的操作翻译成苏丹语或汉语。但目前，要想达到较高水平的语言翻译质量，还需要5到10年的时间。所以，如何界定多样化的语言学习环境更是一个概念上的问题，同时，也是整个世界所面临的问题。谢谢大家！

评论3（Pranee Sangkatavat），泰国苏可泰开放大学：即使在今天的泰国，我们把英语课程当作是小学和初中阶段的补修课程，但是，英语仍被认为是我们成为我们走向全球，进行国际化学习的一个巨大障碍。不过，好在我们只是把英语当作一种学习的媒介。

评论4：回想起1988年的国际远程教育会议，我也有幸参加了。虽然参加那一次会议的人数还没有这间会议室的人多，但我一直认为那也是一次非常美好的经历。那次会议上，贝瑞博士发现英国的开放大学其实是在萨伊德格鲁（Saedeglu）组织的，这可不像我们的会议议程那样一目了然。当时，他给我们展示了一个试验，这就是我为何要提及的原因。那时还处在冷战时期，试验是在美国的麻省理工大学和中国的北京大学进行的。您如何才能讲授一堂科技课？那时卫星是一样新发明。您如何利用卫星与中国的学生保持相互联系？只有在中国教授的帮助下，这个讲演的内容才具有预言性。第二个试验是如何让一位中国的教授
为美国麻省理工学院的学生（主要是美国学生）讲课。解决的方法是你必须关注当地科技的需要，当地的精神，语言问题之类的事情，但这并不起任何作用。这仅是一种反射引起的倒影而已。

（夏冬杰校）
Open and Distance Learning Using ICTs
——UNESCO’s Perspective*

Abdul Waheed Khan

Thank you very much for your very kind introduction. Being associated with the Chinese National Commission for UNESCO, I suppose what else you can say about anyone coming from UNESCO except a few good words. So, thank you for your kind words. But I again repeat I really truly feel very comfortable being with this group of people. I said I used to be profited very much. But that is also the reason for my discomfort because I have not been in open and distance learning for the last at least 7 or 8 years. Nothing in this area and I’m sure that there had been many profound developments. So, that is why I feel deeply uncomfortable, also speaking in your forum. But being part of the family I’m sure that you will overlook my shortcomings.

I. Background of Building Knowledge Societies
   . UNESCO’s Work

In the major restructuring of this program, following the World Summit on the Information Society, UNESCO adopted a six year medium term strategy plan, one of the overarching objectives is building inclusive knowledge societies. And this was clearly based on UNESCO’s advocacy throughout the World Summit on the Information Society, which was held in two phases: phase one was held in Geneva in 2003 and phase two was held in Tunis in 2005. And throughout the preparing processes, UNESCO continued to make the case, that the phenomena that we are witnessing today is not merely information society, but is knowledge societies in plural. Not knowledge society, but knowledge societies. As the discussions progress, there is more and more acceptance of the notion of knowledge societies, because the emphasis of information society is more on technology, on hardware, on connectivity and so on. While the UNESCO stresses more on the human dimensions of the knowledge societies, and because UNESCO has an attractive record of working with, modestly called partners, such as civil societies and organizations, NGOs in private sector, somehow, that advocacy works well for UNESCO and finally in the final declarations at Tunis. There was an acceptance that it is the phenomena that the world is witnessing today is one of knowledge societies. So, that is the background to what I might have something to say.

   . Transform of society and Transformation power of technology

Now, as the world moved from the agriculture society to industrial society, and now, what we call we are entering knowledge societies. Actually, you find societies living even today many societies I come from —are poles apart. People in my village are certainly not part of industrial society even today. And
there are lots of people who are still living in the agriculture society. So, it is not
as if the knowledge societies here exalt pervasive. Nonetheless, the significant
part of the world population today is experiencing what I have called
knowledge societies.

When we moved from agriculture society to industrial society, it was the
machines that replaced the muscle power. The muscle power was multiplied
by machine. So the machine was able to do a lot more than human beings
could do. And as we move from the industrial society to knowledge societies, it
is the information and communication technologies that multiply the brain
power. That is what is happening frankly. That is the main difference between
the industrial society and the knowledge societies. If you look at the historical
development—the steam power from 1780s to 1840s, the railways from 1840s
to 1890s, the electric power from 1890s to 1930s, and motor car from 1930s to
1980s—it is the advances in communication information technology after that.
That is really now triggering what we called the knowledge societies.

II. UNESCO's Model of Knowledge Societies

And today, it is generally recognized that knowledge is a key factor of
economic growth, social development, cultural enrichment and political
empowerment of people. And nothing is more permanent long-lasting than
empowering people living access to information and knowledge. Now, we
believe that any vision of being knowledge societies must be based on at least
two fundamental principles of pluralism and inclusion, because one of the
threats that we face today which is also, by the way, manifested in the global
economic crisis is homogenization. So, there is a need that, as we develop the
vision for building knowledge societies that vision must be based on pluralism
and inclusion, because if you leave out the very significant portion or
percentage of the world population which is not part of the phenomena, then
perhaps there would be not only insecure development but there would also be
a major threat to the world security.

The second, perhaps more fundamental, is that the vision of knowledge societies must be based on human needs and human rights. And we see that four major elements or pillars as you can see are shaped in UNESCO's house logo: knowledge creation, knowledge preservation, knowledge dissemination and knowledge sharing or knowledge utilization.

i. Knowledge creation
If you look at the contribution of information and communication technology, many of us or our students in universities will still remember punching cards to process the information and data. Our children today don't want to even memorize the tables and so on for they all work with the calculators. I'm sure that university has access to all kinds of guidance. But what is really happening is the people or some people argue that knowledge doubles itself every three years. Some people argue now it's two years. They also try to establish the linking between the part of the trip and doubling of knowledge and information. Whatever it is, I think it is safe to say that it is unprecedented today that the way the amount of knowledge and information being created in the world. The result of that is very rapid creation of knowledge, and also very rapid obsolescence of knowledge. Knowledge is becoming obsolete much more quickly, yet it has an implication on the work that we do as open and distance learners. It is also our responsibilities to update knowledge and skills.

ii. Knowledge preservation
Knowledge preservation is an important work for UNESCO because, somehow, people believe that knowledge that we are witnessing today was produced in somewhat 300, 500, and 600 or even a thousand years. That is not the case. The knowledge that we are benefiting from today was medicine, fundamental sciences or plans, sciences of knowledge that is applicable to life. Well, it was not developed in last 500 years but even a thousand years. It is accumulated knowledge centuries and therefore, it is important that knowledge that has been developed over centuries must be preserved. And fortunately again today, the information and communication technology is a great way of preserving that knowledge if you digitalize knowledge, for example, manuscripts for us. We have a program called memory of the world and documents that are of significance to humanity, which can be lost or broken especially when there are natural disasters. But if you preserve that information in digital form, then you are not only able to preserve and pass it on to next generation, but you are able to move it, to make it mobile, make it useful for good of humanity.

iii. Knowledge dissemination
Knowledge dissemination is challenge again, I don't need to believe of this point. This is precisely what we do as educators that from generation to generation: we share whatever knowledge that has been developed. That's
why many universities, especially the land ground university, agriculture universities in U.S. started the tradition of teaching research extension, a triangle interaction between the research that is done, which provides the information for teaching and the extension of the knowledge to the people at large.

iv. Knowledge utilization

At the start of sixties in my own country, India, there're many new agriculture universities, many agriculture research centres established, but only a very small fraction of knowledge that was being generated by those newly established studios was utilized by the farmers. So, it is not only important to create knowledge, to preserve that knowledge but also to share that knowledge so that knowledge can have an impact and people can benefit from that knowledge. So, these are the four pillars that are talked about and included in models of knowledge societies.

III. Description of Knowledge Societies

i. Knowledge societies: Basic features

Anyway, I think I have mentioned about the inclusiveness, plurality, equitability, openness and participation of people. Their knowledge and vision of knowledge society must have been based on these principles. Societal choices inform by democratic debate and consultation with all stakeholders and combination of human factors and technological forces. Technology by itself is not going to bring about positive result society unless it is shaped and governed and is based on certain phenomenon principles and the vision of building the society.

ii. Future of knowledge acquisition and sharing

Any future work that we do in the area of knowledge acquisition and sharing has to be based on openness we talked about in the area of content, standards, structures and interoperative systems so that the technologies can talk to each other. And for the long term of availabilities of this contents that we developed, there are also all kinds of new communities being formed and that is the processes of sharing knowledge and information that also being revolutionized when they especially look at the various new society and new media that allow social interaction today. The architecture of communication from one source to many people is now becoming from many to many. And that is really the process that is very recent. And we must take notice of that if you want to really benefit from it.

iii. Knowledge Societies: New social phenomena

When you look at the societies, of course, for the first time, I believe it was last year that more than 50 percent of the overall world population now lives in the urban areas. And of course, as a result of that, when a lot of people are displaced for the serious issue in this country, certainly the serious issue in my country, we talked about globalization with the human face harmonious development, inclusive development, no matter what you talked about, but that
realization is a problem of divide within societies. And especially, those who are moving from rural areas to urban areas, for them knowledge acquisition, updating of knowledge and still acquiring new knowledge and new skills is very very vital in order for them to survive in new environment. There's also rapid technological change. They also are faced with new structures, new organizations and new interaction in their environment. They also face the issue of cultural diversity because, when people from so many diverse backgrounds and cultures assemble together, it also creates a major problem of cultural and linguistic diversity. And of course, the globalization also has an impact on the climate change and therefore, there's also a need for the eco-literacy.

IV. Background and Challenges of Building Learning Cities

i. For the first time in history, more than half of its population, 3.3 billion people, will be living in urban areas. This will be, in fact, they are living in urban areas. By 2030, this is expected to swell to almost 5 billion. Let us imagine, urban population in Africa and Asia will double between 2000 and 2030. And by 2030, the towns and cities of the developing world will make up 81 percent of urban humanity. That's not surprisingly considering that India and China had long shared one third of humanity.

So, when you talk about learning cities, there has to be a consideration of the availability of resources, institutional capacities, shared community values and of course, I have to plug ICT. That's my bragger button, so I believe that ICT has something to create a learning process by facilitating interactions between these four companions.

Main challenges of “learning cities”

Now, there are some challenges of building learning cities and ensuring good governance, participation, inclusion and empowerment, especially
because of the very skilled background of people, especially the new migrants to the cities. Addressing the good question, the pollution, transportation, energy, natural disasters, and crime, and I did mention a few years ago that I was visiting Shanghai and I went to visit the department of Informatization and I think if you will stay here for a few more days, please take time to visit this department. It does amazing work—how it has analyzed all the processes and has tried to use the information technology to solve things out for all of areas, in most of these areas around them. I don’t define the new investors and creating or preparing people for new professions. That’s where we are coming as distance educators or learners.

Well, I don’t think this community really requires any liberation of this. We do address not the traditional learners who come to universities and colleges or schools only a period of time. Once the traditional learners who come to universities and colleges or schools only a period of time graduate, they’ll have working life and then retirement life. I’m afraid that is changing rather rapidly. The sooner we recognize that, the more we are adding new variety of learners than those traditional learners, particularly, the ordinary citizens, and the people with disabilities. It is estimated that we have roughly 10 percent people with disabilities worldwide. How do you bring them to the full of “learning”? In this country, we have disabilities foundation, and in fact, it is very active. Also, in normal sociologist, the question is: how do you bring the benefit of information and communication technology to what is estimated roughly about 90 million people in this country and about the same number in my country. So, that is about 180 million in two countries in all. I just want to make the point that there’re part of citizens undertaking the responsibility, and that they live a life with dignity.

Then, of course, my communication organizations, simply, I want to make the point that new category of learner, whose learning needs have to be addressed. This is nothing new if you are familiar with UNESCO’s work in the area of learning to know, learning to do, learning to live together and learning to be. It has never been more important than in the context of learning cities frankly. Learning, especially, learning to live together is far more challenging when you pack millions of people crowded in the environment who come from different backgrounds, not only culturally, but also in some cases linguistically.

Well, this is again really nothing new for you. We need greater flexibility. We need cost-effective solutions. We need provision for greater linguistic and cultural diversity and there has to be a direct stronger link to income generation and learning. And that’s why the area of learning that usual represent truly is and has to be the future in the field of education and learning. There’s no question about that. But I keep saying that if it is the future and never present, then nobody will think of giving you the resources to do the office that we need to do today. And that’s why I think it’s the need today, not tomorrow.

V. New Methods of Building Knowledge Societies and Learning Cities
Reengineering the role of traditional knowledge providers

Now, in new environment and invention you need to acquire leadership skills, tolerance, personal communication skills, participation and transparency because if you are living in a village environment, you live that village for centuries, tradition and family bounds that you are up rooted there. If you come to a new place, you have to acquire a new set of knowledge and skills, completely new set of values as well. Therefore, what is called soft skills? Soft skill is going to play much more vital role in learning in future. So, there is a need for reengineering the role of traditional knowledge providers. There is a need for reforming secondary and higher education what profound the statement to group like this, making better use of cultural organizations and their services, such as museums and galleries, the reviewing the role of research institutions with effective links to industries and innovative management and harnessing the role of libraries as knowledge brokers. Again, as UNESCO, we value the work of libraries as centers of knowledge, but there isn’t utilization in the library, community museum or not as community. They have to play new roles and they have to use new tools in order really to serve as knowledge centers or knowledge semi-centers.

New paradigm in education

I’m sure it should be obvious to us that there would be new kinds of knowledge that people need to acquire. But, we believe that education has to go through a new better time shift. But it’s important to realize that it is moving from industrial to service, from supply-driven to demand-driven, from taught learning to flexible learning, from uniform provision to manifold providers, from institutions to networks, from knowledge transmission to personal learning, and from…I wouldn’t say, I don’t know how best the phrase of that, from formal to informal. I wouldn’t say that formal learning is going to be outdated, but that informal learning will become progressively more important that I have no doubt about. So the future would reply bridging new and old learning, fostering network learning, boosting classroom effectiveness, augmenting lifelong learning opportunities, and expanding teaching competencies.

Establishing new processes and building efficient structures

Now, come back again to those three formal areas that we have mentioned earlier. New processes, for example, the think tanks, the academia, the science sector, and the research on the industry, those are the elements in knowledge creation centers, in schools and universities of lifelong learning, in libraries and media. Just imagine today, that they are in study, indicate that our children are spending more time with media and information and communication technology than they are spending with their parents and schools. Now, if that is not going to have profound impact on their learning, psychology and behavior, I think we’d better recognize that today and that’s why it’s important for us to have media educational or media literacy for them and also information literacy that emphasis on how to analyze information and how to provide secure environment for the children from harmful contents, and,
then knowledge users. They are individual learners, communities, government, industry and business. And there has to be interaction and that’s why when you talk about learning cities, you have the environment, you have the knowledge centers, you have media infrastructure and the schools and the universities and then you have concentrated population within the urban centers that can benefit from the interaction among the three.

Figure 3  New processes and efficient structures

There are more efficient structures, competence centers, for example, networks and strategic alliances, lifelong learning centres and collaborative pilot activities. Last year we organized a what-was-called global knowledge park conference. I’m sure many countries’ knowledge park must be a part of the learning city processes, and this is emerging as growth centres where you are able to provide very quickly and very effectively link between the centres that created knowledge and the means.

. ICT in Open and Distance Learning

Figure 4  Open and distance learning process using ICT

Now, what can ICT do? Widen access, that’s obvious. Improve quality. Such large number of learners have been flocking into open universities and distance learning centres simply because these centres provide liberal feeling and uniform quality education irrespective of people’s geographical, social and
gender factors, improve effectiveness, offer personalized learning and reduce cost. I think all of these are true and I’m sure that expectations and advocates of open and distance learning are not something new. Figure 5 Development team based on ICT  You have the companions unlike the traditional education. It is a team approach. It is industrial process. It involves the whole set of knowledge and skills to put together open and distance learning, including the source, the authors, publishers, industries, academia and institutions, digital content developers, technology digital experts and technology utilization in communities.

![Figure 5 Development team based on ICT](image)

Unlike usual teaching, the flexible learning and open and distance learning requires whole set of expertise that comes together. That’s why it’s almost like movie production, you have a commander, you have a script writer, you have an editor, you have structure designer. In other case the structural designer places such a vital role and that’s why the product is really the wholesome product. It’s the product that is developed for learning unlike the traditional system again where learning varies from one teacher to another teacher, from one classroom to another classroom, and certainly from one institution to another institution.

UNESCO’s role

Now, what is UNESCO? What UNESCO does in this area? Of course, it serves level tree of ideas. UNESCO is all of you here because we are greatest explorers of intellectual academia, researches and so on, thousands of people who work on various projects. But one that I would like to mention is the future of knowledge acquisition, which is sharing and I know that some people who participated in that even last year. It is very similar to one that you’re talking about a short while ago about the Shanghai declaration. Perhaps it’s similar to the Columbia Declaration and we’ll be more than happy to share with you the ICT in particular. There’s also declaration from knowledge parks conference that was held up this year in April. Then standards are setting, for example, the
new models of distance learning and ICT competences standards for teachers. It is an example in that area. Acting as a clearing house, we have for example, recently set up what is called open training platform, where we have got the material available from audio and in this season, other international or even indeed from national agencies and that is made available to anyone who wants to use it free of cost. My colleague has been meeting with the UNESCO chairs this year. We have a network called UNESCO chairs, or a network of UNESCO communication information chairs and this serves as a network for us to reflect on various issues relating to information communication technologies.

That’s all, thank you, ladies and gentlemen, for your patience. It was a pleasure for me again to be with you and I look forward to participating in your establishment. Thank you!

(The above is a transcript of recorded keynote speech of 2008 Global Forum on Open and Distance Education at Shanghai TV University and not reviewed by the author.)
USING A ‘PORTFOLIO’ AS AN ASSESSMENT TOOL FOR CONTINUOUS PROFESSIONAL DEVELOPMENT THROUGH OPEN DISTANCE LEARNING IN THE MAURITIAN CIVIL SERVICE

INTRODUCTION

The Mauritius College of the Air (MCA) developed a 60-hour open distance learning course entitled ‘Customer Care and Quality Management’ at the request of the Ministry of Civil Service and Administrative Reforms (MCSAR). The course was designed for public officers of the different Ministries/Government Departments. Over 2000 participants have enrolled this course already.

Each of the participants developed a portfolio for the purpose of both participant assessment as well as course assessment. This paper describes and analyses the assessment through the portfolio development.

WHAT IS PORTFOLIO ASSESSMENT?

It is the assessment of a systematically organised collection of samples of work used to demonstrate knowledge acquisition, skills development, growth and learning. When properly developed, portfolio assessment can provide valuable information about a learner’s background and the learning contexts, the process (how learning has progressed) and ability to apply and extend learning.

Thus portfolios are collections of learner’s work that demonstrates the learner’s progress and achievement in a programme or course of study. A portfolio used for assessment purposes can include examples of learner’s work, projects, improvements, self-evaluations, journals and case studies among others.

The objectives of the course/programme dictate the criteria for portfolio assessment. The portfolio is an assessment tool that can provide to all stakeholders information pertaining to accountability. Here the stakeholders include the learners, the employers, the sponsors, the course provider and the tutors. The process of developing the portfolio rests on an on-going interaction between the participants, tutors and the employer.
Portfolio assessment of a learning programme or participants provides a means of conducting assessments throughout the duration of the programme. Various items pertaining to the work situation and the learning outcomes are carefully selected for inclusion in the portfolio as evidence of learning progress towards learning outcomes.

The portfolio serves as a tool for programme evaluation as well. In fact, one of the strengths of portfolio assessment in programme/course evaluation can be its ability to communicate the impact of the programme/course to all those concerned. It can provide a visually clear description of evidence of achievement. This is more appealing to many employers, policy makers and funders find visual or descriptive evidence of successes of individuals or programs to be very persuasive.

For the ‘Customer Care and Quality Management’ Course, a portfolio is used as an innovative assessment tool – both at the level of the course and the individual participants. The portfolio is developed by the learner as a document according to guidelines provided and with regular interactions with the tutor. The portfolio development starts on day 1 of the course till the end of the course. It is then submitted to the tutor for assessment.

The portfolio aimed at assessing the knowledge, skills and the various activities during the learning processes including the critical self-reflections. The emphasis is on learning rather than on teaching. Klenowski’s (2000) work demonstrates that “the use of portfolios leads to the development of skills such as independent learning, self-evaluation, reflective practice, organisation and meta-cognition.”

In fact, the portfolio assessment is used to illustrate learning in progress. It is often considered an “autobiography of the learner.”

**USING PORTFOLIO ASSESSMENT**

**Design and Development**


the key factors that guide the design and development of a portfolio include the
What is the purpose of the assessment portfolio?
The primary concern in getting started is being clear about the purpose of the portfolio. The first question is ‘What purpose is it expected to serve?’ This will define the operational guidelines for developing the assessment portfolio. For example,

- Will the portfolio be used just as data to inform programme development?
- Will it report learning/development progress?
- Is it just as an assessment tool?
- Is it meant to identify any special need?
- Is it meant to initiate innovation and change?
- Is it part of the accountability mechanism?
- Is it for a combination of the above?

What assessment criteria will be used?
Now that the purpose of the assessment portfolio is clear, the next step is to agree on the assessment criteria. It is also important to select appropriate strategies in line with the purpose of the portfolio. Relevant elements are then identified to constitute the portfolio. This is necessary because they provide evidence of meeting criteria, or progressing in line with the purpose of the assessment portfolio.

What sorts of evidence are required?
While developing a successful portfolio, careful attention is required to a number of questions:

- What sources of evidence should be used?
- How much evidence do we need to make good decisions and determinations?
- How often should we collect evidence?
- Who should certify the elements collected as evidence?
- How congruent should the sources of evidence be?
- How can we make sense of the evidence that is collected?
- How should evidence be used to modify programme and evaluation?
Evidence can relate to knowledge and skills development through understanding; critical self-reflection and application of knowledge and skills developed. The evidences include

- Identification of weaknesses in the normal current work activities following observations, surveys and collection of feedback from customers – These weaknesses can relate to the job structures/system including the processes and procedures, the various tools used and how these weaknesses impact on the vision, mission and objectives of the organization;
- Identification of gaps in personal knowledge, skills/competencies following a self-assessment;
- Actions taken towards elimination of the weaknesses – suggestions for modification of the processes, procedures and tools that are currently being used;
- Actions to initiate new projects, innovative solutions and change;
- Gaps identified and bridging the gap identified in terms of knowledge, skills/competencies – through the self-learning and development processes;
- Self-reflections on the participants choices and learning outcomes – this includes critical reflection regarding the work environment, current practices and learning outcomes pertaining to the learning programme;
- Attestations from employer, supervisor/mentor and external customers – these attestations provide further evidence for putting into practice what is learnt and customer satisfaction;
- Decrease in customer complaints.

**DEVELOPING THE PORTFOLIO**

It is useful to note that the objectives of the portfolio are

- provide evidence of participant’s self-directed learning and development of the required skills;
- promote active learning and focus more on the learning process systematically to show progress over time;
- encourage participant’s development as a critical and reflective practitioner;
- enhance participant’s skills for life-long learning and continuous professional development;
provide for quality formative assessment, ie assessment which assists participant to plan future learning experiences.

Thus portfolio assessment emphasizes the learning process. The first step is therefore to work out “portfolio pathway”. This documents growth over time towards goal(s) identified.

The documentation can relate to statements of the

- end goals;
- criteria and learning/development plans for the future.

This should include baseline information, or items describing the participant's work environment and self-assessment of performance at the start of the learning programme.

Other items include aspects of "works in progress", selected during the learning programme to demonstrate learning progress. Thus at this point, the portfolio is a formative evaluation tool. It is no doubt most useful for the internal information of the participant(s), tutor, supervisor/mentor and employer as they plan forward.

The subsequent step involves developing a collection of the best pieces of participant’s work. This includes examples of the best efforts of a participant during the learning/development process for putting into practice the knowledge and skills developed. These also include evidences that demonstrate achievement of programme goals and objectives. The best pieces of participant’s work encourage reflection about change or learning. For the participant this provides opportunities for a sense of ownership and strength. It helps to show-case or communicates the accomplishments of the participant in the learning/development programme. Now the portfolio serves as summative evaluation tool. This may be particularly useful for the providers of training, the sponsors and the employers.

**WHAT ARE THE ESSENTIAL CHARACTERISTICS?**

Effective assessment portfolios are associated with a six characteristics as identified by Barton and Collins (1997) - [quoted by Meg Sewell, Mary Marczak, & Melanie Horn, in the ‘Use of Portfolio Assessment in Evaluation’]
The portfolio needs to be

- **multi-sourced** - This allows for the opportunity to evaluate a variety of specific evidences.

- **authentic** - The context and evidence are directly linked. The items selected or produced for evidence should be related to learning/development programme activities, as well as the programme purpose and criteria.

- **dynamic** – It must capture both the learning and the learning process, capturing growth and change. Evidence is added at many points in time, not just as "before and after" the programme. Thus in addition to the best work, the portfolio includes examples of different stages of learning/development.

- **explicit** - the purpose and goals are clearly defined and understood by all concerned. The participants should know in advance what is expected of them, so that they can take responsibility for developing their evidence.

- **integrated** - (evidence should establish a correspondence between programme activities and life/work experiences. Participants are required to demonstrate how they can apply their skills or knowledge to real-life situations.

- **based on ownership** - the participant helps determine evidence to be included and goals to be met. The portfolio assessment process requires that the participants engage in some critical reflection and self-evaluation as they select the evidence to include and set or modify their goals.

- **multi-purposed** –This allows assessment of the effectiveness of the programme while assessing performance of the participant. A well-designed portfolio assessment process evaluates the effectiveness of the learning/development programme at the same time that it evaluates the
growth of the participants. It also serves as a communication tool when shared with the sponsors, employers, tutors, supervisors/mentors and course provider.

**LIKELY SUCCESS FACTORS**

Effective portfolio assessment relies on a number of critical considerations:

- Careful planning;
- Matching the design of the assessment portfolio with the programme objectives:
- Providing all the necessary information and guidelines to the participants and tutors in advance;
- Indicating clearly the usefulness of the assessment portfolio to the participants and the employers;
- Motivating and sustaining the motivation of the participants;
- Adequate briefing/training of all those who would be involved in the development and assessment of the portfolio during the training period;
- The mechanisms by which the assessment portfolios are developed must be established in a manner that all the learners, tutors, employers, peers, etc are comfortable with the types of evidence, the confidentiality of the evidence and the control over that evidence.
- Assessment criteria need to BE as transparent/clear as possible;
- A clear set of acceptable types of work/creation or evidence of learning outcomes must be established more objectivity.
- In addition to the range of acceptable evidence, it is important to identify quality benchmarks that determine the quality of learner performance.
- Nature of acceptable evidences must be clear;
- Support and collaboration of employers, providers of training, supervisors/mentors;
- Adequate logistics and resources to support and sustain the learning and development process;
- Commitment, openness and flexibility of employers, supervisors/mentors for innovation and change;
Monitoring and addressing problems during the learning and development process. A systematic review of the process must be developed and implemented, to ensure that the process meets all needs.

THE CUSTOMER CARE AND QUALITY MANAGEMENT COURSE

This programme is associated with three new elements:

- **Flexible open distance learning** compared to traditional face to face teaching and learning;

- **CDROM-based for e-learning** with occasional face to face tutorials compared to print-based learning materials;

- **Assessment through portfolio development** compared to traditional assessment in terms of marks/grades resulting from assignments/tests and/or examinations.

OBJECTIVES OF THE PROGRAMME

At the end of the programme, participants are expected to:

- Explain the importance of customers and customer care in the public sector;
- Explain the rationale behind customer service excellence;
- Identify customers needs and expectations in terms of public services;
- Explain the factors that determine customer service excellence;
- Identify the features of customer service excellence;
- Deliver & maintain customer service excellence;
- Build and enhance customer relationship;
- Respond to customer services problems effectively;
- Handle customer complaints effectively;
- Demonstrate effective communication skills;
- Practise customer care skills;
- Devise a plan for customer service excellence;
- Monitor and assess the effectiveness of customer service excellence.
WHAT AREAS ARE CONSIDERED IN THE PORTFOLIO ASSESSMENT?

The portfolio developed by the learner needs to demonstrate three key elements. These are

- **understanding** - Learners have to complete a number of tasks or answer a number of questions related to the course and their current work practices;

- **self-reflection** – Learners have to summarise their learning experience and reflect critically on what is being learnt; the current work practices and the learning outcomes for the course;

- **application of knowledge and skills developed** – Learners have to explain how they are putting into practice the knowledge and skills developed and how these are contributing to improving quality, efficiency and effectiveness of services provided. This is where they have to provide evidence to demonstrate application of the knowledge and skills.

BRIEFING OF PARTICIPANTS/TUTORS

The tutors were trained for the delivery of the course and the provision of learner support. The areas covered during the training included

- Tutoring for open distance learning;
- Supporting open distance learners;
- Assessment portfolio.

All participants were briefed at the induction sessions regarding the

- Rationale for the course;
- Course structure & contents;
- Course assessment;
- Portfolio development.
Clear instructions and guidelines were provided to the participants concerning the development of the portfolio. Opportunities for regular interaction between participants and the tutors were incorporated in the course delivery plan.

KEY ELEMENTS OF THE PORTFOLIO

**Cover Note:** To start with the learner prepares a brief about him/her and his/her work context/practices. This provides sufficient details that enable the tutor to situate the contexts under which the learner is operating.

**A pre-course and post course self-assessment of competencies:** The learner undertakes a self-assessment of skills/competencies related to the course using a scale 1 – 5 as follows:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Poor</td>
<td>Poor</td>
<td>Satisfactory</td>
<td>Good</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

The self-assessment is done before the course and then after the course. This helps the learner to assess the learning that has taken place. Learner self-assessments and goals demonstrate how learning is taking place and how progress is being made.

**Summary of the Learning Process:** As the learner progresses with the course, he/she records the essentials details that help him/her to prepare the summary of the learning process. This includes the general feeling; what has been learnt; what has been put into practice; what improvement has been noted; what cannot be applied at the workplace; what are the constraints; what is irrelevant, etc.

**Self-reflection:** The self-reflection process starts on day 1. The self-reflection pertains to learning outcomes of the course, the learning content, the current work practices and possible improvements. Learners have to write down these self-reflections according to guidelines provided. This part is important in promoting reflective practices. As defined by Schon (1996), “reflective practice involves thoughtfully considering one’s own experiences in applying knowledge to practice while being coached by professionals in the discipline.”
Completion of Tasks/Answering questions to demonstrate understanding: Here the learner answers a number of questions related to the learning contents and the current practical work problems. Through this part the learner demonstrates understanding of knowledge, key concepts and principles.

Compiling evidence to demonstrate application of knowledge and skills to improve work practices in terms of quality, efficiency and effectiveness: In this part the learner explains how he/she is applying what has been learnt. Evidences must also be furnished by the learner to support what is claimed.

The reliability of the portfolio as an assessment tool can be improved when the evidences are derived from various sources, such as identification of weaknesses in the delivery of services, initiatives taken towards improvement, customers, peers and the boss. Reliability is also increased when participants create evidences for the portfolio. This is possible and tends to be credible when the participants are actually putting into practice what has been learnt.

The evidences compiled by participants included the:

- Critical analysis of the tools, means and methods used in service delivery;
- Identification and assessment of weaknesses in the delivery of services;
- Development of new/innovative ideas to address the problems identified;
- Initiation of change for improvement;
- Creation of new service delivery tools;
- Attestations from customers;
- Confirmation note from the superiors.

Sometimes journal entries can be used to demonstrate writing skills and/or a self-assessment tool. The purpose of the journal and the goals of the portfolio determine how the entries are included in the portfolio.

LEARNER FEEDBACK
Feedback collected from the 181 participants out a group of 225 through a questionnaire demonstrated the following:
Course outcomes
Most respondents agreed that the course outcomes related to knowledge recall, understanding, application and critical thinking. They agree that the course lived up to their expectations, they accomplished the objectives of the course and they are applying what they have learnt. 2.76% did not agree to the above.

Course assessment
Most respondents found the mode of assessment for the course satisfactory. 16.6% of respondents claim that the opportunities for them to assess their own progress were not sufficient.

How learners View a Portfolio?
Most learners stated that the portfolio development had a positive impact. Part of the results sheet of the evaluation exercise is reproduced below:

<table>
<thead>
<tr>
<th>The portfolio development helped me to</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>reflect on what I learnt during the course</td>
<td>85.6</td>
</tr>
<tr>
<td>reflect on my experience</td>
<td>89.5</td>
</tr>
<tr>
<td>apply the customer care principles in my work</td>
<td>89.5</td>
</tr>
</tbody>
</table>

There was also an open ended question regarding the portfolio in the questionnaire. The question was related to the relevance and validity of the Portfolio as an assessment tool. - **What is your opinion about the assessment through your portfolio development? How far does it help reflective practice – that is reflecting on what you learn and putting into practice what is learnt?**

A few learners were initially worried about the development of the portfolio. This was because it was a new assessment tool different from the traditional one. Although a few complained about the fact that the development of the portfolio takes much time, most of them acknowledged that it is a relevant and valid form of assessment for this course.
Some typical responses include:

- **Good means of assessment and helps reflective practice**
- **Is appropriate - It is pragmatic**
- **This is new to me - A rich experience. A good experience**
- **It is very good, well guided and useful**
- **Good but difficult to produce evidence**
- **It is a good way to help us reflect on how we should practice what we have learnt. The portfolio has helped me to develop and reflect what I have learnt – reflective practice**
- **It helps to apply what I learn. The portfolio has benefited me and improved my skills to put into practice what I learnt**
- **Practical - It is a good exercise**
- **Is a good method of assessment – it enlarges our horizon. Objective way of assessment. Very good way of assessing understanding and progress**
- **Portfolio is appropriate for this type of course**
- **It brings more consciousness and helps to apply what is learnt**
- **The portfolio has compelled me to reflect and apply what is learnt**
- **Helped to realise the improvements that can be made – The portfolio encourages reflective practice and deep thinking. It helped me to analyse my weaknesses and strengths**
- **The portfolio helps to insert our own reflective part**
- **It is an opportunity to use the experience - I can express what I have learnt in the portfolio**
- **Testing the understanding capabilities**
- **The portfolio has helped me to better understand customer care course, its principles and application in everyday life**
- **It is most appropriate mode of assessment – the portfolio is well worked one - It’s a new way of self-assessment**
- **A good practice as it helps to reflect on our behaviours**
- **Very good – helps us to correct our bad habits, perform better and serve better**
- **The Portfolio has helped us go through our past experiences, reflect and to deal with similar situations with better attitudes**
- Reflective practice helps in self assessment and improvement
- It is well planned and - Quite demanding
- Allows me to ponder over the realities surrounding my work
- It is an essential element of the course
- Preparing the portfolio helps to learn more about your strengths and what can be done to improve work practices
- Quite good – motivates us to put into practice what is learnt
- The portfolio enables the tutor to judge the extent the participant has engaged with the course
- You get the practical aspect when you do the portfolio
- Helps to assess exactly what has been learnt
- It helps to assess our own weaknesses and strengths
- Ensuring that objectives of the course are attained

LESSONS LEARNT

Portfolio assessment is a reliable assessment tool for continuous professional development programmes through open distance learning. It provides useful information both for the employer and the employee (learner).

The strengths - Portfolio assessment

- Enables the assessors/tutors to see the learner as an individual, each unique with his/her own characteristics, strengths and diverse needs.

- Provides a basis for future analysis and planning. By viewing the total pattern of individual participants, one can identify areas of strengths and weaknesses and barriers to excellence.

- Serves as a powerful means of communication, providing on-going communication or exchanges of information among those involved.

- Promotes a shift in ownership; employers and employees (learners) can take an active role in examining where they are and where they want to go.
Offers the possibility of addressing shortcomings of traditional assessment. It offers the possibility of assessing the more complex and important aspects of an area or topic with inputs from the participants.

Covers a broad scope of knowledge and information, from many different people who know the programme or person in different contexts (e.g., participants, colleagues, providers of training, tutors, peers, or employers).

Personalisation of the assessment.

The weaknesses - Portfolio assessment

May be seen as less reliable or fair than more quantitative evaluations such as test scores;

Can be very time consuming for tutors or programme staff to organize and evaluate the contents;

If goals and criteria are not clear, the portfolio can be just a miscellaneous collection of pieces of work that don't show patterns of growth or achievement.

REFERENCE


A Golden Combi?! -

Open Educational Resources and

Open, Flexible and Distance Learning

Final report from the ICDE Task Force on Open Educational Resources

Fred Mulder and Jos Rikers

December 2008

Summary

This final report of the ICDE Global Task Force on Open Educational Resources addresses the relevance of the worldwide OER movement to educational institutions - such as ICDE member institutions - engaged in the field of open, flexible and distance learning.

The composition of the Task Force, with members from open and distance learning universities around the world, sought to provide representation for OER developments worldwide. In order to gain an overview of the penetration of OER developments and involvement, an initial survey of ICDE member institutions was conducted. The Task Force found that it could build on a report from OECD on OER that was published just as the Task Force held its launch meeting. The OECD report “Giving Knowledge for Free: the Emergence of Open Educational Resources” gives a very thorough overview of OER developments so far and in addition identifies the major problems and topics for further consideration. The Task Force has used this report for general reference and has focused on the topics and issues that are particularly relevant for open and distance learning institutions, concentrating on higher education.

The ICDE SCOP Meeting 2007 at OUNL in Heerlen, The Netherlands was used to consult the presidents and rectors of ICDE member institutions on the expected outcomes of the Task Force’s work.

This Final Report describes major milestones during the work of the Task Force and summarizes its conclusions and recommendations in a final chapter.
Introduction

In 2001, the Massachusetts Institute of Technology launched its Open Courseware initiative. Since then the so-called “Open Educational Resources” (OER) movement has spread around the world. In the arena of open, flexible and distance learning several significant initiatives have been undertaken, for example in Europe: Open Learn by the Open University in the UK, Open ER by the Open Universiteit Nederland (OUNL), and MORIL (Multilingual Open Resources for Independent Learning) by EADTU (European Association of Distance Teaching Universities) and its members. Organizations like UNESCO have taken an interest in this development from the start. OER is of particular relevance for developing countries as OER combined with open, flexible and distance learning can contribute to easier and better access to education.

Recognizing the importance of this movement, and based upon discussions between ICDE (International Council for Open and Distance Education) and UNESCO at the ICDE SCOP Meeting in Lillehammer in June 2006, ICDE elected to establish the ICDE Global Task Force on Open Educational Resources, to be composed of members from every continent, and with differing cultural and educational perspectives. This new Task Force (TF) was announced during the 22nd ICDE World Conference. In order to show its support for the initiative, UNESCO invited the TF to hold its launch meeting at UNESCO’s Headquarters in Paris in November 2006.

The ICDE SCOP Meeting hosted in June 2007 by OUNL in Heerlen was fully devoted to OER with the theme ‘Open Educational Resources as an instrument for achieving Education for All’. This SCOP Meeting was instrumental in advancing the work of the TF on the basis of the Interim Report presented to SCOP 2007 by the TF Chair, and to further develop the thinking among SCOP participants on OER as an innovative and challenging concept as well as on OER strategies and implementation scenarios. The TF held a parallel meeting alongside the SCOP Meeting in Heerlen, observing the major conclusions and recommendations of the SCOP Meeting and agreeing on how to proceed. The TF completed its work by delivering its Final Report to the ICDE SCOP Meeting hosted by Shanghai TV University in October 2008, and by having this report accepted by ICDE.

This Final Report contains the following chapters:

1. Scope and composition of the TF
2. Results of the OER questionnaire distributed to ICDE member institutions
3. Outcomes of the 2006 launch meeting of the TF at UNESCO’s Headquarters in Paris
4. The ICDE membership perspective on the OECD Report on OER
5. Outcomes of the ICDE SCOP Meeting 2007 at OUNL
6. Further developments after the ICDE SCOP Meeting 2007
7. Conclusions and Recommendations
8. Epilogue: does India show the way?
1 Scope and composition of the Task Force

The ICDE Global Task Force on OER is - through its members - connected to several world regions, links to other initiatives on OER, and includes representation from UNESCO.

The TF has the following members:

- Fred Mulder (Chair), Rector, Open Universiteit Nederland, The Netherlands (also Chair PC 2007 ICDE SCOP Meeting-Heerlen/ NL, Chair PC 2009 ICDE/ EADTU World Conference-Maastricht/ NL, and Chair EADTU OER/ MORIL Task Force)
- Nick Allen, Provost Emeritus and Collegiate Professor, University of Maryland University College, USA
- Susan D’Antoni, Programme Specialist, Open Educational Resources Project, UNESCO
- Stuart Hamilton, CEO, Open Universities Australia, Australia
- Helmut Hoyer, Rector, FernUniversitat in Hagen, Germany (also acting ICDE President until the end of 2007)
- Sally Johnston, Vice President Academic Affairs, Winona State University, USA
- Fredric M. Litto, President of ABED, Brazil (also member ICDE Executive Committee as of January 2008)
- Bernard Loing, ICDE Permanent Delegate to UNESCO, France
- Frits Pannekoek, President, Athabasca University, Canada (also ICDE President as of January 2008)
- Paulina Pannen, Director, SEAMEO Regional Open Learning Centre (SEAMEO SEAMOLEC), Indonesia
- Barney Pityana, Vice Chancellor, University of South Africa, South Africa (also member ICDE Executive Committee as of January 2008, former ACDE President)
- Reidar Roll, Secretary General, ICDE (until Spring 2007)
- Tarek Shawki, Director, Cairo Office, UNESCO
- Atwi Suparman, Rector, Universitas Terbuka, Indonesia
- David Vincent, Pro Vice-Chancellor, Strategy Planning and External Affairs, The Open University, UK (also EADTU President).

Furthermore the TF is supported by:

- Jos Rikers, Senior Officer International Relations, OUNL (also Chair Organizing Committees of the 2007 ICDE SCOP Meeting - Heerlen/NL and Of the 2009 ICDE/EADTU World Conference - Maastricht/NL)
- Ana Perona, Assistant Secretary-General, ICDE Secretariat (part of 2007: Acting SG)
- Nina Bagley, Chief of Information and Membership Services, ICDE Secretariat.

The mandate of the Task Force was to develop a report on Open Educational Resources. The report aims to contribute to the global OER movement, adding specific ‘ICDE’ flavor and value by adopting the self-and-distance-learning perspective rather than the mainstream content-in-classroom perspective.

The report tackles subjects including:

- Availability/access
- Intellectual property rights
- Internationalization versus Localization of content (regarding language and culture)
- Support for learning communities
• Quality control
• Financing and sustainable business models
• Interfacing with conventional degree studies
• Opportunities for bridge-building between informal, non-formal and formal learning
• Diversity in target groups
• Experiences/ good practice with existing offers, various options, misuse and benefits to institutions offering OER
• Potential for developing countries using OER
• Changing roles of the public and private sectors
• Other issues considered relevant by the group

The aim of the TF is to produce a report that will serve:

• As an aid to Higher Education and Open and Distance Learning institutions in their decision to introduce, or not to introduce OER activities, either as a provider or as a recipient
• As a promotional basis for the OER concept
• As a guideline for interested stakeholders
• To assist ICDE in defining its own strategy in this field, including a proposal for an action program for collaboration among its membership
• To contribute to the OER global movement from the perspective of independent (or autonomous) learning in a distance learning setting rather than teacher dependent learning in a face-to-face setting
• As a paper for presentation, consideration and discussion at the 2007 ICDE SCOP Meeting

2 Results of the OER questionnaire distributed to ICDE member institutions

In the middle of October 2006 ICDE members were sent a questionnaire on OER. The purpose was to obtain an overview of the issues at stake and the level of involvement of the ICDE membership in this movement.

A fair number of ICDE members (17%) from different world regions responded.

The results showed that OER is a very actual theme for many institutions around the world.

To the question about their knowledge on the OER movement, 68% were definitely acquainted with the movement, while 32% was not too familiar with it.

To the question of the institution’s involvement or planned involvement in a Project on OER, 60% were positive while 40% were negative. Those involved in projects have also described them, and provided links to the relevant websites.

The major opportunities which OER could bring to open, flexible and distance learning institutions, can be summarized as follows:

• Easy access to quality content, reaching a wider audience
• Cost effectiveness: it can help distance learning providers to be more cost effective in developing learning materials and support
• Greater volume of learning resources available to all

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4 The Questionnaire was composed by Jos Rikers (OUNL), and the process administered by the ICDE Secretariat.
• Quality learning materials can be obtained by nations and institutions with scarce financial resources to help solve capacity problems
• Flexibility: greater variety and diversity of learning resources will create more flexible learning opportunities
• Opportunities for sharing of available resources, increase opportunities for partnerships, for instance through a “Share-alike” protective clause in a Creative Commons license.

The following major threats that OER could represent for open, flexible and distance learning institutions have been mentioned:

• Copyright, Intellectual Property Rights issues: there is potential for copyright infringement of restricted works by OER authors
• Quality: OER without appropriate review processes can lead to low quality materials
• Cultural domination / Globalization: there is a potential risk for increasing the digital divide
• Lack of a viable new business model that may replace the old one
• Well known “brand” institutions may attract even more students
• “Not invented here” syndrome, academic preference to use their own materials
• Lack of initiative: less scope for research and innovations and uniform prescription of materials, less incentive to produce knowledge
• Content is not the same as learning materials.

Finally, 92% of those who answered the inquiry responded positively to the question about their interest in participating in ICDE activities in this topic.

Further information about the questionnaire results can be obtained from the ICDE Secretariat.

3 Outcomes of the 2006 launch meeting of the Task Force at UNESCO’s Headquarters in Paris

With UNESCO and Dr. Abdul Kahn as host, the launch meeting of the Task Force on November 12-13 in Paris proved to be a fruitful and necessary first interactive exercise on OER.

Important input was given by all members of the TF. More specifically there were three presentations, by:

• Fred Mulder (OUNL, TF Chair), ‘Bringing a global movement on OER in a new learner centered mode’
• Jan Hylen (OECD), ‘An overview of most important issues related to the further development of OER’
• Jos Rikers (OUNL, TF support), ‘ICDE TF OER Questionnaire results’.

These presentations are accessible through the ICDE Secretariat, as is the case with a rather extensive report on the meeting.

Here we only present the ten main highlights from the discussions:

1. The main message was that the OER movement should focus more on the Independent learner, on top of the ‘traditional’ emphasis on the distribution of digital classroom content. This implies:
• ‘Open’ is meant to contribute to better and easier access
• ‘Educational’ is to be read as directed towards learning and in a student-centered approach
• ‘Resources’ is to be interpreted in a broad sense, and not only to support teachers but also to support learners

This is a perspective that typically can be achieved by the ICDE membership and can be facilitated by ICDE in collaboration with UNESCO.

2. In order to underline this somewhat other paradigm we might want to use the term Open Learning Resources (OLR) rather than OER. Furthermore it was raised that the OER definition is too vague. Does it refer to a course, an object, large pieces or small pieces? What degree of granularity is intended? Is it meant for teachers, or learners, or both? However, it was a rather general feeling that we should work with a concept that stays as broad and general as possible, keeping the word ‘Education’. What MIT offers is mainly content, not learning materials. This TF needs to develop the ICDE touch.

3. ‘Open’ does not necessarily mean ‘free’. MIT puts the content online, but the learning experience is not free, neither the pedagogy. Materials can be free on the web, but added value through services cannot. Where do we draw the line? ‘Open’ and ‘free’ are different concepts. The barriers must be low, OER must be easy to find, attractive, to provide people with easy access to get them into Higher Education. The concept is new: we do not know how this will develop.

4. The concept is too abstract: what is the position of a given teacher or student in a given country? We need a bottom-up approach, more than a top-down approach. Developing countries do not want to see themselves only as users, but as producers of materials as well.

5. Some findings and preliminary conclusions of the OECD study, lead by Jan Hylen, on the map and scope of the OER movement:

• It is a global movement
• There is a growing number of initiatives and resources, but accurate figures are lacking
• There is a growing number of users, mainly in the categories of post-secondary instructors, students and the general public
• User data are poor, because of the easy access and most providers have no registration requirement.

A basic observation is that there is a growing competition among Higher Education Institutions for funding and for students. Some institutions give the content away while others are keeping it under tight control. What are the implications?

6. With MIT, Tufts, and Johns Hopkins as sources, the OECD study gives the following characterization of the use and the users of OER:

• Well-educated (bachelors or masters) self-learners, from North America
• Often use it as supplement or complement for its flexibility and quality
• Primarily in small chunks of learning.

7. According to the OECD study the following motives may hold for institutions:
• Altruistic reasons
• Leverage on taxpayer money by allowing free sharing and reuse between institutions
• “You give it away and you receive it back improved”
• Good PR show window that attracts students
• With growing competition, new, attractive and easily distinguishable models are needed
• Stimulation of internal improvement, innovation and reuse.

Motives for individuals can be:

• Altruistic reasons
• Desire to stimulate innovation
• A wish to share for creative and educational purposes
• Publicity or reputation
• Like the open source movement in software (boost own ego)

8. The OECD study refers to the following main challenges:

• Quality and relevance of resources
• IPR, copyright and licensing
• Sustainability
• Goals
• Organization: size, structure, degree
• Type of resources and media format for sharing

As possible revenue models the OECD study mentions:

• Replacement models: OER replaces other costs (has a natural limit)
• Foundation-donation models (for starting up)
• Segmentation models, offering added value services to user segments
• Conversion models (commercial mode): give away a part, build the market and convert consumer to paying customer
• Voluntary support membership model
• Contributors-pay-model: contributors pay the costs while the provider makes it available for free

9. The OECD study identifies as technical issues:

• Open source software and standards
• Metadata harvesting
• Security, privacy, long term presentation
• Individual faculty and students using free services outside the university network
• Who owns the information? What if a company that runs it, starts charging?
• Long term preservation of information and research data

Moreover, the OECD study also addresses the question:

“What is new with OER?”

• Way of grass root involvement as producers and users
• Strength of allowing a multiple motivational system: altruistic and economic driven
• Open-up for new business models  
• Brings web 2.0 to education  
• Technological developments challenge HE institutions  
• New wine in old bottles: “is it a way to hype up e-learning again?”

(10) Some comments on the OECD study:

• There is a problem of lack of stimuli and incentives: what do I get back? Without a reward system, academics will not be willing to collaborate. In many developing countries teachers have a source of income when preparing students. We need a business model that convinces people to give away their materials.
• There was no mention of the language issue! There is cultural hegemony. English is too dominant. We must pay attention to cultural models of learning, and academic cultures. Barrier-free and open differs among the different cultural contexts.
• An information literacy course would be essential in order to be able to discern and evaluate the quality of the materials available.
• A crucial issue is to motivate key decision-makers to make materials available. Only 1% of a university budget spent on open access press would be hugely transformative.
• The Task Force should identify how a free system can be designed or built to hold the reference systems or templates together. How the systems can talk to each other. Now portal and repositories do not talk to each other. There are many access questions.
• The format of delivery of OER is very important, bandwidth / access to technology issues, how to deliver in a particular context varies.
• What is the specific ICDE flavor: what will be the branding, uniqueness of ICDE in OER? Maybe not to be addressed to individual learners alone. It might be institutional capacity building, or a learner-centred approach from an institutional point of view.

Summary of recommendations for the TF mandate:

1. We should not address all types of general OER issues (that is being done by many others already), but rather concentrate on the self-study and learner-centered approach of OER materials, in other words the ICDE flavor in OER.
2. We can lend from a variety of rich sources: UNESCO, Hewlett Foundation, OECD, Open Courseware Consortium, EADTU
3. There is a need for fundamental reflection on the OER definition within the context of the open and flexible learning model as applied – although in some variety – throughout the ICDE membership.
4. An extremely important issue is the business model, as is the cultural, linguistic, political and economic diversity.
5. We underline the primary question: “How can OER contribute to respond to the ‘Education for all’ UNESCO policy, capacity building, widening participation and access?”(emphasizing the developing countries context).
6. And the secondary question: “What role can be attributed to OER in developing or strengthening a knowledge-based society?”(emphasizing the developed countries context).

4 The ICDE membership perspective on the OECD Report on OER

The OECD study referred to in the previous Chapter resulted in a report which in its final draft version was sent to the Task Force members for reflection from a specific ICDE point of view. The reviews that we have received have been collected in a compact presentation, ordered according to
the chapters that were reviewed\(^5\).

Note that after having sent the draft OECD OER Report to the TF members for reflection, the report was published in its definitive form by the OECD under the title: ‘Giving Knowledge for Free: the Emergence of Open Educational Resources’\(^6\).

The reviewers agree in their opinion that the OECD OER Report shows excellence. It is a very relevant and readable report that is to be recommended to all who are active in the OER area as well as to those who wish to get a better insight into the OER concept and the global OER movement. It has the characteristics of an overview report on the one hand and giving direction on how to tackle some of the major OER issues in an appropriate pragmatic way on the other hand. That indeed makes it attractive and very valuable for all OER interested individuals, organizations and governments around the world.

Nevertheless the TF has generated a series of notions and comments as well, supportive, questioning, or critical. The most relevant ones are summarized below.

Summary of the reviews:

1. Besides the four forces for change with high impact on Higher Education (HE) that are mentioned: globalization, demography, governance and technology, we might identify an important fifth force for change, a fifth challenge in HE, that is the need for substantial up-scaling of the total population in HE. Present day mainstream campus-based HE cannot cope with such (large) demands. OER and the model of open and flexible learning offer relevant solutions in this respect.

2. LifeLong Learning does not receive much attention. The natural bridging between informal, non-formal and formal learning by OER and the paramount opportunities this offers to widening and increasing participation in Higher Education, however, make OER probably a most powerful instrument in the area of Lifelong Learning (LLL).

3. Public funding is referred to in the report. Thinking of knowledge as a public good, indeed giving it for free, and the supposed responsibility of governments for access, quality and efficiency of HE (and education in general), would justify a ‘good’ debate on the funding role of governments.

4. In the LLL perspective, freely available content on the Internet should empower learners to really study on their own in an open and flexible learning environment, with no (avoidable) references to a teacher, a classroom or an educational institution. This requires structural and explicit learner-centered content design instead of the conventional teacher-centered content approach.

5. One might question whether for openness the no cost attribute is fundamental, or is actually a complex system of mechanisms that removes all traditional existing barriers: institutional registration, required diplomas/ certificates, on-campus classes and face-to-face meetings, fixed schedules, rigid pacing, over-specified programs, too big program components, and so forth. Here the characteristic Openness of the Open and Distance Learning (ODL) Universities is at stake: in its broadest interpretation open as to access, places, scheduling,

\(^5\) Input has come from: Susan D’Antoni, Stuart Hamilton, Helmut Hoyer, Sally Johnstone, Frits Pannekoek, Paulina Pannen, and Tian Belawati (on behalf of Atwi Suparman).

pacing, and combining courses, as well as open to people, methods and ideas, linking this openness with OER, could make ODL universities important players in the OER movement.

6. Many OER users seem to be well-educated learners. This is not surprising since OER materials generally are not designed for self-study and that’s why a high level of education is required in order to be able to learn without additional guidance or support. This means that the potential of OER is heavily underexploited. The report refers to the three European OER initiatives from ODL Universities mentioned earlier (UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL)⁷. These OER activities can be considered as a new generation (‘second wave’) in OER development, since their learning materials are explicitly designed for self-study. This significantly lowers the barriers to self-learners as compared to providing classroom learning materials. If we take UNESCO’s goal of ‘Education for All’ seriously, this is extremely important, also in connection with the earlier remarks on up-scaling, LLL and informal learning.

7. Open courseware should take into account the IP and copyright heritage of other cultures, particularly China. It should be realized that open courseware could be a one-sided exercise. If there are more ‘takers’ than ‘contributors’ to open courseware will the world be richer? If Euro-American centric institutions dominate the contributions – as is likely – what will be the international outcome?

8. The ultimate openness of OER leads to a large flexibility in the process of continuous and interactive development and implementation anywhere, anytime, by anybody. The OER contributors share the willingness to devote their time to work on OER activities, and enjoy the input and feedback from others wherever and whenever. However, once the euphoria of being an OER developer subsides, maintaining the OER materials updated at high quality might be very difficult.

9. The report fails to provide concrete sound economic models for OER. HE institutions do have various options, however, to possibly find considerable revenues, not from their content, but rather from credentialing, from examination processes, and from personal support to learners.

10. In regions and areas where ICT opportunities are scarce there is a danger that ‘the (prospective) users are left behind’. So, a prerequisite for a successful OER movement is easier and better access to ICT facilities, which implies that they should have a high priority in any OER action plan.

11. In many countries, where English is not widely spoken, it will be close to impossible to effectively join the international OER community. A way out is OER initiatives in different (working) languages. This practice is encouraging and necessary. Nevertheless, there remains a language barrier to a full sharing of experiences and lessons learned with colleagues from different parts of the world.

12. Generally translating is not enough since the conversion of the learning materials should also include adaptation to a different social-cultural context. For this so-called ‘localization’ process automation is no option, which implies ‘hard labor’.

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⁷ See:
http://www.open.ac.uk/openlearn/home.php;
http://www.opener.ou.nl;
http://wwweadtu.nl.
13. OER is warmly welcomed by the developing countries, because this will provide access for students and institutions to learning resources, which previously were restricted to specific institutional use only. ODL Universities can benefit from OER materials in being able then to reduce the costs for developing their learning materials. There also exist, however, serious barriers for the use of OER in developing countries: (i) the low degree of access to ICT facilities and the corresponding high costs, and (ii) the social and cultural context for the learners and the society in which they live, which may be very different from the environment where the materials have been developed. Localization is absolutely necessary.

14. The Quality Assurance (QA) issue is addressed in the report but its extreme importance cannot be overestimated. The ODL Universities could contribute to this easily by labeling their OER materials with their reputations and brand names (as is suggested in the report). In Europe, the EADTU has run a QA project, called E-xcellence, addressing the quality of e-learning along various aspects. The outcomes have been generally applauded, are very practical for direct operational use, and might be valuable for the QA of OER.

5 Outcomes of the ICDE SCOP Meeting 2007

The SCOP Meeting at OUNL with its theme ‘Open Educational Resources as an instrument for achieving Education for All’ was an important event for the Task Force. One could say that the SCOP Meeting acted temporarily as an extension of the TF, developing feedback, critically reflecting, generating ideas, setting priorities, and giving direction to the OER future for ICDE and its membership.

The SCOP Meeting is an exclusive meeting for the leadership of the ICDE member institutions (Vice-Chancellors, Rectors, Presidents, Directors, and Principals). SCOP 2007 was attended by about 60 participants (of whom ten TF members) from 22 countries whereby all the continents around the world were represented.

The program of the SCOP Meeting shows a mix of plenary sessions with a variety of expert speakers from academia, research, government, industry, ODL University OER initiatives, UNESCO and OECD, and a series of highly interactive thematic workshops. The Dutch Minister of Education, Culture and Science was present at the opening session, thereby underlining the importance of the overall theme for the maturing Dutch knowledge-based society. The TF Chair presented the TF Interim Report as substantial preparatory work to SCOP 2007.

The three thematic workshops turned out to be very fruitful and effective. The participants were split in groups based on their regional (continental) origin: one Asian group, one European group and one group for the other continents.

In the first workshop on ‘What is OER for the ICDE membership?’ the discussion focused around the question what in OER is typical for ODL institutions (ICDE membership) and what issues might be of a more general nature, for all institutions in (higher) education to consider, or for national authorities to deal with.

The second workshop on ‘Policies, impact conditions and implementation for the ICDE membership’ addressed the question of what ICDE can and has to contribute to the worldwide OER movement and in service to its members. Because the participants were grouped according to their regional origin, it was easy to record the large diversity in topics that were put forward. As a basis, a survey by UNESCO, identifying relevant topics when dealing with OER, was used. The topics were discussed and prioritized. Copyright issues, awareness raising and promotion, financial issues,
quality assurance, learning support services, and assessment of learning were all topics scoring high amongst the participants, but in different orders of priority depending on the continental origin.

This workshop resulted in a recommendation to ICDE to establish a clearing house or support centre for their membership. In this support centre information on the different topics could be provided. At the same time this support centre could track the progress of OER and the progress within member institutions and share this information amongst the membership. ICDE could also set up an online training program for faculty and contribute to the clarification of standards on the metadata level in developing OER materials.

Workshop number three on ‘Sustainability of the OER approach for the ICDE membership’ touched the fundamental discussion of the business model of the institutions. If content is no longer the unique selling point, what is it then that institutions should market? Or does OER mean that institutions as we know them today are obsolete? The discussion was strongly related to the discussion in workshop number one, where an ICDE shaped definition of OER was considered. Depending on that definition, how ‘open’ is OER in the context of higher education and does ‘open’ necessarily mean ‘for free’?

The conclusion from this workshop was that there is not one definition of OER nor is there a single model for sustainability. There is a strong dependency on the local situation. The workshop results indicated a clear link between governments’ ambitions to increase participation rates in higher education and the need to redefine sustainability of OER provided by publicly funded institutions. This does not automatically mean that all learning with OER should be for free for the learner. It was concluded that ‘open’ is not equivalent to ‘for free’ for all components of the OER-based learning process. Again, this workshop advised ICDE to establish a support facility for information exchange, learning from best practices and stimulating collaboration. A warning was issued not to replicate what other consortia already do.

With the TF Interim Report as input, the broad spectrum of relevant outcomes of the thematic workshops, the deep scholarly views from the variety of plenary speakers, and the engagement of all participants it was not difficult to close the SCOP Meeting with a proper and distinct set of conclusions and recommendations. The Task Force had a meeting next to SCOP 2007 in Heerlen, reviewed and virtually adopted the SCOP 2007 conclusions and recommendations, and added to them a minor extension in terms of some further actions to be planned by ICDE. The merger of the TF reviewed SCOP 2007 conclusions and recommendations and the TF extension will be presented in Chapter 7.

6 Further developments after the ICDE SCOP Meeting 2007

We are witnessing a solid expansion of the global OER movement.

- There is an ever increasing number of initiatives worldwide, not only in Higher Education but also in Secondary Education, varying from top-ranked universities to regional colleges, from institutional consortia to individual actions, in a broad spectrum of disciplines
- The UNESCO OER Community is growing in membership and remains as active as ever, after initial intensive forums run by UNESCO’s International Institute for Education Planning (IIEP)
- The Open Courseware Consortium initially launched by MIT and incorporated as a non-profit organization shows a substantially growing membership from a wide variety of institutes in different countries around the world

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9 See: http://www.ocwconsortium.org/.
• The William and Flora Hewlett Foundation has been very instrumental by financing many OER projects, starting with MIT in 2001, and still is a crucial player in boosting the OER movement both with financial support and through their extensive network of expertise and advice\textsuperscript{10}.

The recent developments in Europe are of particular interest within the context of this TF Report dealing as it is with OER for open and flexible learning in general and OER related to ODL Universities more specifically. The projects OpenLearn from UK OU and OpenER from OUNL, both started in 2006, have come to the stage that both front running universities UK OU and OUNL must soon resolve their strategic dilemma regarding a full conversion to OER. The other eight ODL Universities in the EADTU/ MORIL project are all developing their own OER strategy or implementing their own OER policy. Of these the Turkish ODL University Anadolu is the ‘champion’ with the announcement in 2008 (on its 50\textsuperscript{th} anniversary) of a comprehensive OER strategy.

An interesting new EADTU initiative, partly financed by a Hewlett Foundation supplementary grant, is to organize an OER Seminar Series. This series consists of three OER Seminars. The OER Strategy Implementation Seminar has already taken place in May 2008 at UK OU, and was mainly targeting the European ODL Universities. Products of this first seminar in the series are available\textsuperscript{11}. Integral cases by UK OU (OpenLearn) and OUNL (OpenER) have been presented and discussed, dealing with such issues as strategy, sustainability, technology, IP, curriculum, academic, participation, quality, and organizational structures. In addition, a participants’ confrontation was set up with various institutional approaches of ODL Universities.

The OER Strategy Development Seminar is particularly meant for regular universities and associations of those universities, providing the sharing of knowledge and experiences resulting from the EADTU/MORIL initiative. K.U. Leuven is the host and the dates are October 28 and 29, 2008.

The OER Capacity Building Seminar, which is to set the stage for OER capacity building on various continents, will start with raising awareness and gathering different points of view, strategies and priorities on OER. This seminar will be organized in close interaction with UNESCO and is scheduled for January 2009 at UNESCO’s Headquarters in Paris.

Finally, in this chapter on further developments after ICDE SCOP 2007 it is worthwhile to note that:

\begin{itemize}
  \item UNESCO has published an interesting document ‘OER: the Way Forward’, which is the fruit of the community’s collective reflection on how to advance the OER movement: it identifies the key issues, priorities, lead stakeholders, and what to do\textsuperscript{12}, and is currently available in 13 languages
  \item One of the TF members, Fred Litto, gave a presentation on the work of the ICDE OER Task Force at the Fifth Pan-Commonwealth Forum on Open Learning (PCF5) in July 2008 in London; this was in an inspiring and well attended session dedicated to OER with other presentations by UNESCO (Susan D’ Antoni), Hewlett Foundation (Marshall Smith, Catherine Casserly), and Vijay Kumar from MIT on the National Knowledge Commission (NKC) in India
  \item Of course OER will be discussed, evaluated, and advanced as one of the major themes in the upcoming ICDE 23\textsuperscript{rd} World Conference on 7-10 June 2009 in Maastricht, The Netherlands\textsuperscript{13}.
\end{itemize}

\textsuperscript{10} See: \url{http://www.hewlett.org/Programs/Education/OER/}.
\textsuperscript{11} See: \url{http://labspace.open.ac.uk}.
\textsuperscript{12} See: \url{http://oerwiki.iiep-unesco.org/index.php?title=OER:_the_Way_Foward}.
\textsuperscript{13} See: \url{http://www.ou.nl/icde2009}.
7 Conclusions and Recommendations

As indicated in chapter 5, here, the conclusions and recommendations of the 2007 SCOP Meeting (as reviewed and adopted by the TF) are presented here in combination with recommendations from the TF for further steps to be undertaken by ICDE.

The ten major conclusions in this Final TF Report are:

1. The primary question is: ‘How can OER contribute in responding to the UNESCO policy of ‘Education for all’, in capacity building, as well as in widening participation and access?’
2. The secondary question is: ‘What role can be attributed to OER in developing or strengthening a knowledge-based society?’
3. Combining the strengths of ODL universities with the OER concept is the most effective method for society to tackle both the primary and secondary questions.
4. ‘Open’ is not equal to ‘free’.
5. It is imperative to keep OER away from a fundamentalist approach or a dogmatic view.
6. Diversity is crucial when considering the potential for OER and opportunities regarding e.g. target groups, goals and ambitions, varying stages of development, national systems, scale and scope, content sharing, and so on.
7. Because of this diversity, international prioritization is difficult and should be brought back to institutional and at most national level.
8. ‘Knowledge is a public good’ and requires public funding.
9. Sustainability is not to be taken for granted and depends on a change in funding schemes (change in weighting of components or additional money).
10. It is necessary to explore the potential and added value of public-private interaction, collaboration, and partnerships.

The eight main recommendations in this Final TF Report are that ICDE and its membership should:

1. Avoid addressing general OER issues as is being done by many others already, but rather concentrate on the self-study and learner-centered approach to OER materials - the ODL flavor of OER as reflected in the profile of ICDE membership institutions.
2. Undertake a more detailed analysis of the diversity regarding OER, the underlying assumptions or grounds and the required variety in actions (e.g. collaboration between ICDE and UNESCO).
3. Develop practical reports or handbooks that relate OER to ODL on themes such as OER implementation, quality assurance, sustainability, adaptation to language/ culture, content and services , IPR/ copyright, all of this based on case studies that can be made available (e.g. from frontrunners in Europe, from EADTU and other regional associations).
4. Exploit the ICDE website as a forum for information exchange and discussion, establish a support centre for the ICDE membership and other mechanisms in order to exchange strategies, policies, best practices, and expertise, as well as to stimulate collaboration.
5. Contribute to awareness raising and mobilize political resonance as well as media exposure using ICDE as a brand.
6. Make a list of possible concerns (from faculty, students, institutions points of view) that can be expected and formulate responses.
7. Develop further collaboration with regional/ continental ODL associations (EADTU, AIESAN, AAOU, ACDE, USDLA, ABED) and other international organizations (UNESCO, OECD, Hewlett Foundation, Open Courseware Consortium, Commonwealth of Learning, SEAMEO).
8. Organize OER Summer Institutes in order to prepare faculty, one per region/ continent in co-operation with the appropriate ODL associations and with selected member institutions.
taking the lead; attendance by members of ICDE (at a discount) as well as non-members.

Recommendation (H) regarding the OER Summer Institutes has a natural link with the EADTU Initiative, financed by the Hewlett Foundation, to start an OER Seminar Series in 2008, as discussed in the previous Chapter. The last of the three EADTU OER Seminars is a capacity building seminar for heads of ODL universities outside of Europe in order to reach out to the other continents. It will be held at UNESCO’s Headquarters in Paris (where we started the ICDE TF work) in the beginning of 2009 and may be considered to offer an exploratory platform (or prototype) for subsequent regional/continental OER Seminars (or Summer Institutes). It would be wise for ICDE, EADTU and other ODL associations to join forces in this respect.

Finally, the Task Force recommends to the ICDE Executive Committee to discharge the TF from its duties, to dissolve the TF, and to install a new Task Force with experts from ICDE members that can work on the recommendations provided in this report. The mandate of such a newly formed Task Force should be in agreement with the ICDE Executive Committee.

With respect to this Final Report the Task Force advises the ICDE Executive Committee to publish an appealing public version and to organize political resonance and media exposure around it. This public report should be made available to the press and be disseminated to relevant stakeholders in as many countries as possible with the help of ICDE members.

8 Epilogue: does India show the way?

India has a high-level advisory body to the Prime Minister, the so-called National Knowledge Commission (NKC). NKC has been in operation since October 2005 and has published two annual Reports to the Nation. The follow-up to the reports has shown-according to NKC-laudable support from the government in terms of adopting its recommendations and providing appropriate funding as well. The NKC Agenda places high priority on education as a central instrument for achieving rapid and inclusive growth with specific emphasis on expansion, excellence and equity.

‘Report to the Nation 2007’ reviews the (earlier) 2006 recommendations and specifies the (new) 2007 recommendations. This 2007 set of recommendations covers a wide range of areas: Health information Network, Portals, Legal Education, Medical Education, Management Education, Intellectual Property Rights, Innovation, Traditional Health Systems, and Legal Framework for Public Funded Research, plus two areas that are specifically relevant for this Task Force Report: open and distance education (ODE) and open educational resources (OER).

On page 17 of the report NKC states that ‘distance education can provide access to education for a large number of students, including for learners with special need. With the proliferation of media like television, radio and internet, its reach can be significantly increased. NKC recommendations on distance education focus on creating a national ICT infrastructure, developing web-based common open resources, establishing a credit bank and providing a national testing service.’

And on pages 51-52 the NKC report addresses open educational resources. Below we include three interesting quotes…

‘Our success in the knowledge economy hinges to a large extent on upgrading the quality of, and enhancing the access to, education. One of the most effective ways of achieving this would be to


NKC, its mission and its work was referred to at PCF5 in July 2007 in London through an interesting presentation by Vijay Kumar from MIT (see also Chapter 6).
stimulate the development and dissemination of quality open access (OA) materials and open educational resources (OER) through broadband internet connectivity. This would facilitate easy and widespread access to high quality educational resources and drastically improve the teaching paradigm for all our students.’

‘A set of key institutions should be selected and experts representing diverse knowledge areas like agriculture, engineering, medicine, arts, humanities, science, education, etcetera should be asked to develop standards-based content, which can be customized to diverse user needs. This should be made available not only to Indian institutions but also for global use.’

‘The content in the repositories should be multimedia, interactive and available in different regional languages. These projects should cover a wide range of subjects mentioned above. To speed up the creation, adaptation, and utilization of OER, it is necessary to launch a ‘National E-content and Curriculum Initiative’.’