

教育部所屬各機關因公出國人員出國報告書

(出國類別：出席國際研討會)

第七屆經濟合作暨發展組織 (OECD) 研討會  
E-Learning in Post-Secondary Education

## 出國報告

出國人：韓善民 (教育部電子計算機中心高級管理師)

出國地點：日本東京

出國期間：民國 90 年 6 月 4 日至 6 月 7 日

報告日期：民國 90 年 3 月 25 日

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公務出國報告提要

頁數: 共約70 含附件: 是

報告名稱:

赴日本東京出席OECD國際會議

主辦機關:

教育部

聯絡人/電話:

馬淑珍/23565907

出國人員:

韓善民 教育部 電算中心 高級管理師

出國類別: 其他

出國地區: 日本

出國期間: 民國 90 年 06 月 04 日 - 民國 90 年 06 月 07 日

報告日期: 民國 90 年 09 月 05 日

分類號/目: I8/資訊科學 /

關鍵詞: OECD, E-Learning, 網路學習, 經濟合作暨發展組織

內容摘要: 赴日本東京出席OECD國際會議主要心得: 一· E-Learning學習模式的發展已是不可擋的趨勢, E-Learning學習人數增加快速。二· 提供 E-Learning發展環境、課程、師資、相關服務的輸出國如美國、澳洲等有很強的企圖心打開各國市場。三· 經貿組織會議碰到學習與教育相關議題時, 討論的重點與思考方向幾乎都以商業利益為主軸, 教育與學習發展的遠景很難回歸以教育本質來思考。四· 在由E-Learning 輸出國強勢主導相關遊戲規則的情況下, 若要取得多一點的自主權, 我們整合並發展華文網路聯盟或華文E-Learning市場, 或許是一個突破點。五· 看見E-Learning商機的人多, 投入開發市場的經費與資源也多, 大家忙著推廣E-Learning卻很少深入了解E-Learning的發展對學習者、對社會、對教育會帶來什麼樣的影響與衝擊。各單位規劃推動E-Learning的同時亦應重視這個問題。

本文電子檔已上傳至出國報告資訊網

教育部所屬各機關因公出國人員出國報告摘要表

編號:C09003613

報告名稱	第七屆 OECD 國際研討會			報告時間	90.08.25
姓名	韓善民	服務機關	教育部電算中心	職稱	高級分析師
出國類別	出席研討會	出國地區	日本	使用經費	58329 元

## 壹、任務範圍

參加於東京舉行之第七屆經濟合作暨發展組織 (OECD) e-Learning in Post-Secondary 會議。

## 貳、內容重點

### 一、目的

- (一) 經濟合作暨發展組織 (OECD) 為我國尋求加入之國際組織組織，能獲邀參加相關會議，有利交流。
- (二) 研討各國推動 e-Learning 相關事宜。

### 二、行程

- 六月四日 搭機赴東京
- 六月五日 OECD 研討會
- 六月六日 OECD 研討會
- 六月七日 搭機返台

### 三、研討內容

- (一) 討論 E-Learning 的發展趨勢。
- (二) 討論 E-Learning 在教育方面的商業服務。
- (三) 討論如何確保 E-Learning 教學品質。
- (四) E-Learning 帶來的商業行為與商機相關政策討論。

## 參、主要心得

- 一、E-Learning 學習模式的發展已是不可擋的趨勢，E-Learning 學習人數增加快速。
- 二、提供 E-Learning 發展環境、課程、師資、相關服務的輸出國如美國、澳洲等有很強的企圖心打開各國市場。
- 三、經貿組織會議碰到學習與教育相關議題時，討論的重點與思考方向幾乎都以商業利益為主軸，教育與學習發展的遠景很難回歸以教育本質來思考。
- 四、在由 E-Learning 輸出國強勢主導相關遊戲規則的情況下，若要取得多一點的自主權，我們整合並發展華文網路聯盟或華文

E-Learning 市場，或許是一個突破點。

- 五· 看見 E-Learning 商機的人多，投入開發市場的經費與資源也多，大家忙著推廣 E-Learning 卻很少深入了解 E-Learning 的發展對學習者、對社會、對教育會帶來什麼樣的影響與衝擊。各單位規劃推動 E-Learning 的同時亦應重視這個問題。

#### 肆、建議事項

- 一· 建立華文網路學習聯盟。
- 二· 建立發展 E-Learning 環境之相關規範及標準。
- 三· 建立 E-Learning 實施成效評鑑機制。
- 四· 將國內大學與業界發展 E-Learning 的資源做適度整合，發展具特色的 E-Learning 課程，開發國際市場。
- 五· 在商業利益掛帥的 E-Learning 國際市場中保存一些以文化、教育為主軸的人文思考來規劃、觀照我國的 E-Learning 發展，這樣較不會迷失了教育與學習的真正目的，也能發展出自己的特色。
- 六· 針對 E-Learning 對學習者、社會、教育、文化帶來的衝擊作深入的了解與分析，以期發揮正面效應減少負面影響。

# 議 程

6月5日	
09:00-09:30	報到
09:30-09:50	開幕典禮
09:50-10:30	<p>專題演講</p> <ul style="list-style-type: none"> <li>* 網路學習應用在回流教育的整體發展趨勢</li> <li>* 網路學習與終身習的發展趨勢</li> </ul>
10:30-10:45	即席問答
11:05-11:45	<p>專題演講</p> <ul style="list-style-type: none"> <li>* 日本網路學習的發展事宜與趨勢</li> <li>* 全球網路學習市場近況？</li> </ul>
11:45-12:00	即席問答
13:30-15:30	<p>分組研討</p> <p>主題：</p> <ul style="list-style-type: none"> <li>* 網路學習政策應用在回流教育的範圍與趨勢</li> <li>* 網路學習相關的法規（含立法）事宜</li> <li>* 確保網路學習品質的方法</li> </ul>
15:30-16:45	分組總結報告
18:00-20:00	晚宴
6月6日	主題：在教育服務方面的網路學習與商機
09:30-10:30	專題演講

10:30–10:40	問與答
11:00–12:00	綜合討論
12:00–13:30	午餐 主題：網路學習應用在回流教育：確保品質的挑戰
13:30–14:30	專題演講
15:00–15:30	綜合討論 主題：當前相關政策及下一步的走向
15:30–17:00	專題演講

# 第七屆經濟合作暨發展組織 (OECD) 研討會

## 出國報告書

### 壹·前言

網路學習 (E-Learning) 蔚為風潮，不但成為不可擋的學習趨勢，也帶來了龐大的商機。經濟合作暨發展組織 (OECD) 此次在日本東京召開的會議主要就在研討網路學習應月於回流教育的相關議題。會中討論的重點大多以解決 E-Learning 輸出國在開拓國際市場時面臨的問題為導向，而這些輸出國的考量則是以商業利益為主軸，所以美國代表在會議中點名泰國、日本 (本次會議主辦國) 等網路學習輸入國應加強改善諸如關稅等政策與法規，以利 E-Learning 課程與相關服務的輸入。然而 OECD 雖為經貿組織，促進國際經貿合作勢所難免，但是畢竟 E-Learning 的發展有文化、教育、社會的因素在其中，教育與學習內涵的發展涉及到教育的目標與思想的層次。本次會議在這方面幾乎完全沒有探討，恐導致 E-Learning 未來雖然在量上會快速成長，但在教育與學習的本質上確可能失焦。

### 貳·大會專題發表摘要

#### 一·日本 E-Learning 發展現況與趨勢

日本大學需修 124 個學分，其中 60 個學分 (含以上) 用視訊會議系統或 Internet 進行教學。其資訊與通訊科技用在大學的部分主要有即時互動衛星、Internet、視訊會議系統及單向衛星傳播四種。2000 年日本國立大學使用多媒體教學的比例約 63%，其中基礎建設項目的比率為視訊 30%、Internet 27%、CD-ROM 26%、DVD-Video



8%、DVD-ROM 7%。整體而言，國立大學發展的情形比地方的公立及私立大學要好。

日本 E 化政策為：提升全民資訊素養、加強各級學校資訊科技教育、推動成人終身教育及相關資訊。

## 二· E-Learning 在回流教育上發展的四個要項：

- 1.人類智慧及更上層樓學習需求的時代
- 2.Internet 的崛起
- 3.新方式新重點的學習
- 4.E-Learning 成功實現的要件

E-Learning 市場已充斥許多提供學習資源、平台、內容、編輯工具、多媒體軟體的供應者，但是上述任一項目皆無法單獨有效的完成 E-Learning。一個整合上述所有項目（甚至更多）的系統是實施 E-Learning 成功的要件。

### 三·教育服務貿易的發展及相關事宜

#### 1.教育服務相關貿易金額（不含公司及海外貿易的部分）

金額單位：百萬美元 1970年—1999年（出口）

	1989年	1997年	1999年
澳洲	584	2190	2030
加拿大	530	595	703
墨西哥	——	44	47
紐西蘭	——	282	209
波蘭	——	16	26(*)
英國	2214	4080	4464(*)
美國	4575	8346	9572

(\*)資料提供自 1998年

資料來源：OECD 服務業貿易統計

#### 2.出口教育服務佔國家總貿易額度比例，1989—1999

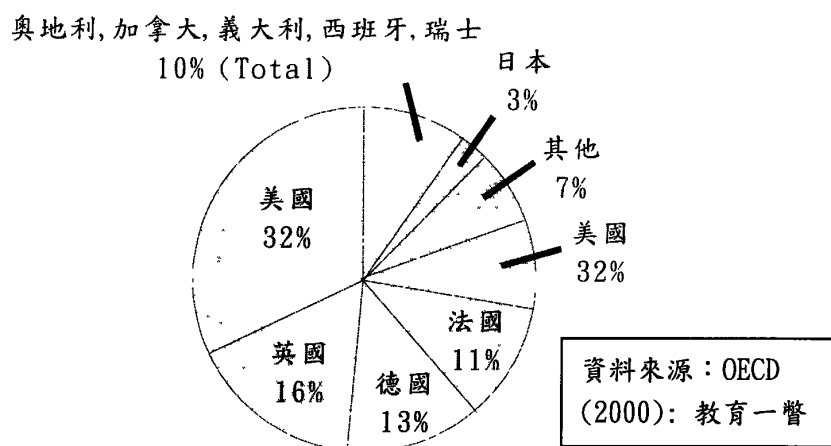
	1989年	1997年	1999年
澳洲	6.6	11.8	11.6
加拿大	3.0	1.9	2.0
墨西哥	——	0.5	0.4
紐西蘭	——	6.6	4.9
波蘭	——	0.2	0.2(*)
英國	4.5	4.3	4.5(*)
美國	4.4	3.5	3.8

(\*)資料提供自 1998年

資料來源：OECD 服務業貿易統計

上述資料顯示以貿易金額而言，美國是最大教育服務輸出國，1999 年輸出產值達 95 億 7200 萬美元；以貿易金額佔國家總貿易額度比率而言，則是澳洲排第一位，其教育服務輸出值佔全國貿易額百分之十一點六。

### 3. 學生流向，1998 (留學生分佈情形)



### 130 萬國際留學生

——43%來自 OECD 會員國，57%非會員國。

——主要來自：中國、日本、希臘、韓國、馬來西亞、德國、土耳其、法國、義大利、印度、印尼、新加坡、泰國

### 4. WTO 在教育服務貿易上的協商

目前為止只有美國向 WTO 提出教育服務貿易的企劃，而 GATS 已涵蓋了教育服務的項目。一般的共識為自由開放的企劃僅限於高等教育服務及成人教育與學習的貿易範疇。針對這方面的協商，WTO 在未來已排定了許多會議進行討論，到目前為

止並沒有具體的完成時間表，也沒有正式的部門或協商團體進行這件事情。

#### 四·重要政策考量

- ※對 E-Learning 提供者是否要訂國際／國家規範標準？
- ※對 E-Learning 消費者是否要訂保護措施？
- ※相關規範後面的文化差異問題。
- ※如何規範一個“虛擬的世界”？
- ※學習教材智慧財產權的問題——在自由與限制間的平衡點。

#### 五·全球教育共通的發展優先順序

- ※ 分享在 E-Learning 實施中最好的經驗。
- ※ 支援相關研究發展技術，嘉惠開發中國家。
- ※ 改進網路連線品質。
- ※ 建立電子化教與學的世紀典範。
- ※ 減少數位落差。
- ※ 整合線上學習活動。
- ※ 蒐集線上學習資料。
- ※ 訂定全球國際化的目標。

### 參·心得感想

在短短的兩天會議中，不論是專題演講或分組討論，可以深刻感受到 OECD 召開本次會議的主軸是放在促進 E-Learning 市場發展上，且 E-Learning 輸出國的聲音大過 E-Learning 輸入國。換言之，議題討論的核心往往是如何排除輸出國貿易上的障礙；相對的輸入國（或其他國家）所

關心的：在教育與學習範疇的智慧財產權應如何拿捏、發展 E-Learning 所要考量文化、社會、教育及思想層次的問題，都未多做探討。主要心得摘錄於下：

- 一· E-Learning 學習模式的發展已是不可擋的趨勢，E-Learning 學習人數增加快速。
- 二· 提供 E-Learning 發展環境、課程、師資、相關服務的輸出國如美國、澳洲等有很強的企圖心打開各國市場。
- 三· 經貿組織會議碰到學習與教育相關議題時，討論的重點與思考方向幾乎都以商業利益為主軸，教育與學習發展的遠景很難回歸以教育本質來思考。
- 四· 在由 E-Learning 輸出國強勢主導相關遊戲規則的情況下，若要取得多一點的自主權，我們整合並發展華文網路聯盟或華文 E-Learning 市場，或許是一個突破點。
- 五· 看見 E-Learning 商機的人多，投入開發市場的經費與資源也多，大家忙著推廣 E-Learning 卻很少深入了解 E-Learning 的發展對學習者、對社會、對教育會帶來什麼樣的影響與衝擊。各單位規劃推動 E-Learning 的同時亦應重視這個問題。

## 肆· 建議事項

我國要在 E-Learning 市場中佔有一席之地且取得教育、文化、社會等因素的平衡，不被商業利益完全主導，建議朝下列方向發展：

- 一· 建立華文網路學習聯盟。
- 二· 建立發展 E-Learning 環境之相關規範及標準。
- 三· 建立 E-Learning 實施成效評鑑機制。
- 四· 將國內大學與業界發展 E-Learning 的資源做適度整合，發展具特色的 E-Learning 課程，開發國際市場。
- 五· 在商業利益掛帥的 E-Learning 國際市場中保存一些以文化、教育

為主軸的人文思考來規劃、觀照我國的 E-Learning 發展，這樣較不會迷失了教育與學習的真正目的，也能發展出自己的特色。

六·針對 E-Learning 對學習者、社會、教育、文化帶來的衝擊作深入的了解與分析，以期發揮正面效應減少負面影響。

## 伍·結語

在各大國際組織 OECD、WTO . . . 等忙著推估 E-Learning 市場的產值時，我們無論將來是 E-Learning 輸出國或輸入國（或二者兼俱），不能把眼光只放在商業利益上，教育與習的價值不是金錢能計算的，如果說是為了促進全人類的福祉有點陳竟過高的話，那麼至少讓我們朝分享 E-Learning 中最美好的經驗、創造 E-Learning 世紀典範作品、嘉惠開發中國家、減少數位落差做起吧！

【附件】

大會相關資料

**7<sup>th</sup> OECD/Japan Seminar**

*On*

**E- Learning in Post-Secondary Education:  
Trends, Issues and Policy Challenges Ahead**

*Organised by*

***CENTRE FOR EDUCATIONAL RESEARCH AND INNOVATION/ ORGANISATION FOR  
ECONOMIC CO-OPERATION AND DEVELOPMENT  
(OECD/CERI)***

*in co-operation with*

***THE JAPANESE MINISTRY OF EDUCATION, CULTURE, SPORTS, SCIENCE AND  
TECHNOLOGY (MEXT)***

*And*

***NATIONAL INSTITUTE OF MULTIMEDIA EDUCATION, JAPAN (NIME)***

**5<sup>th</sup> and 6<sup>th</sup> June 2001**

**KKR Hotel Tokyo  
1-4-1 Otemachi, Chiyoda-ku, Tokyo**

**Programme**

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**Day One Tuesday 5<sup>th</sup> June**

**9h00 - 9h30  
Registration**

**9h30 - 9h50  
Opening, Welcome**

- Mr Teiichi Sato, Advisor to the Minister of Education, Culture, Sports, Science and Technology (MEXT), Japan and Governing Board member of CERI
- Mr John Martin, Director, Directorate for Education, Employment, Labour and Social Affairs, OECD



## Session 1: Trends in E-Learning in Post-Secondary Education

*Chair: Mr John Martin, OECD*

One of the major trends of the globalised economy is the growing transnational knowledge and learning market in post-secondary education. The rapid development of new information and communication technologies (ICT) in education is facilitating the cross-border supply of on-line learning. Universities and private enterprises are increasingly partnering in for-profit companies to meet the demand for on-line learning on a global scale. The CERI/OECD report on "E-learning – The Partnership Challenge" will be available for the participants at the conference.

The aim of the first session is to obtain a general overview of this post-secondary market in the context of lifelong learning and the knowledge society.

- What are the major trends and scale of the post-secondary e-learning market? What are the implications of these market developments for universities and other post-secondary institutions, publishers, e-learning software companies, etc.?
- To what extent have the new technologies changed the **demand** for post-secondary education? What do we know about student and learner demand for e-learning? Are some subjects more difficult to learn through e-learning? What are the implications for lifelong learning strategies?
- To what extent have the new technologies changed the **supply** of post-secondary education in terms of learning environment, learning contents, changes and reorganisations of suppliers of education in partnerships at national and international levels?
- What might be the implications of these developments for access to e-learning material? Are we moving towards a digital learning divide?
- Is there a global e-learning market? What are the social and cultural dimensions of education and learning which work against a global e-learning market?

**9h50 - 10h30**

### **Key Presentations**

- Presentation by Mr Geoffrey Cox, Provost of Cardean University: "Global trends in e-learning in post-secondary education"
- Presentation by Professor Chris Duke, University of Auckland, New Zealand: "Trends in e-learning and lifelong learning"

**10h30 - 10h45**

### **Q&A**

**10h45 - 11h05**

### **Tea / Coffee**

**11h05 - 11h45**

### **Key Presentations**

- Presentation by Dr. Takashi Sakamoto, Director-General, National Institute of Multimedia Education (NIME), Japan: "Trends and issues of e-learning in Japan – University Education Reform Based on Information and Communications Technology".
- Presentation by Mr Yoshimi Fukuhara, Senior Vice President, goo and E-cube, NTT-X: "What is happening in the global e-learning market?"

**11h45 - 12h00**

**Q&A**

**12h00 - 13h30**

**Lunch**

**13h30 - 15h30**

**Two parallel workshops (including tea / coffee break)**

**Themes:**

**a) Scope and trends of e-learning policies in post-secondary education**

**b) The legislative framework for e-learning**

**c) Quality assurance mechanisms**

- Workshop 1: Presentation by Mr Jeremy Stuparich, Assistant Director, Educational Developments Unit, Higher Education Innovation and Quality Group, Department of Education, Training and Youth Affairs, Australia
- Workshop 2: Presentation by Mr Maurice Gross, Directeur de l'école de formation Centre National d'Enseignement à Distance (CNED), France

**15h30 - 16h45**

**Reporting of the workshop discussions in plenary and short remarks from the Chair**

**18h00 - 20h00**

**Reception hosted by the Ministry of Education, Culture, Sports, Science and Technology (MEXT), Japan**

**KKR Hotel, 10<sup>th</sup> floor, "Room Zuihounoma"**

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**Day Two Wednesday 6<sup>th</sup> June**

**Session 2: e-Learning and Trade in Educational Services**

*Chair: Mr Jarl Bengtsson, OECD*

The development of e-learning is also related to having a set of agreed international rules for trade in educational services. Currently, educational services is one of the topics under negotiation of the General Agreement on Trade in Services (GATS), which is taking place under the auspices of the World Trade Organisation (WTO).

One can distinguish between four modes of supplying educational services across borders: 1) *consumption abroad* refers to situations where a service consumer moves to another country to obtain the service; 2) *cross-border supply* of educational services, which is most likely going to be a fast growing market through the use of new ICT's; 3) *commercial presence* implies setting up facilities abroad by education providers e.g. "local branch campuses"; 4) *presence of natural persons* consists of a person (professor, teachers etc.) entering another country to provide an educational service.

The aim of this session is to give an update to the participants on these negotiations, and to discuss its possible impact on supply and demand of post-secondary education. The OECD will also report on the discussions at the OECD Education Ministers Meeting, 4th April 2001 on this topic.

- What is the present situation and the key issues discussed concerning in the GATS negotiations on trade in educational services, especially concerning trade in post-secondary education?
- What are the benefits and risks of the liberation of trade in educational services on quality and availability of education services in OECD countries?

**9h30 - 10h30**

**Key Presentations**

- Presentation by Mr John Martin, Director, Directorate for Education, Employment, Labour and Social Affairs, OECD, on the discussion at the OECD Education Ministers Meeting.
- Presentation by Dr Marjorie Peace Lenn, Advisor to the U.S. Government in the Trade Agreement Negotiations for Education Services and Executive Director of the Center for Quality Assurance in International Education and the National Committee for International Trade for Education on the overview and update of the negotiations on education services
- Presentation by Mr Paul Cappon, Director General, Council of Ministers of Education, Canada

**10h30-10h40**

**Q&A**

**10h40-11h00**

**Tea / Coffee**

**11h00 - 12h00**

**Discussion in plenary**

**12h00-13h30**

**Lunch**

### **Session 3: E-Learning in Post-Secondary Education: The Challenges of Quality Assurances**

**Chair: Dr. Takashi Sakamoto, NIME, Japan**

Several policy issues are emerging with cross-border provision of post-secondary education through the use of new technologies. One of these is the need to define and establish appropriate systems and processes for assessing competency and knowledge, and for formal assurance of the acquisition of knowledge that takes place outside of the traditional (national) institutional structure. Individuals must be able to rely on credentials, which are portable and recognised in relevant professional or academic environments.

- What are the attempts to develop quality assurance and accreditation systems with cross-national applicability in post-secondary education? What are the barriers?
- What is the potential for developing multiple quality assurance systems according to the following five possible modes of quality assurance control: 1) by the receiving country; 2) by supplying country; 3) international bilateral agreement; 4) international multilateral agreement 5) hybrid of individual institutions and private sector and/or governments.
- How can the quality of access and “consumer / learner protection” be best ensured as cross-border provisions for e-learning expand?

**13h30 - 14h30**

#### **Key Presentations**

- Presentation by Mr Masato Kitani, Director, Higher Education Policy Planning Division, Higher Education Bureau, MEXT, Japan: “Policy issues emerging with cross-border provision of higher education”.
- Presentation by Mr Salvador Malo, former Secretary General of Universidad Nacional Autonoma de Mexico (UNAM) and representative of OECD/IMHE
- Presentation by Dr Pamela Pease, Co-chairperson of GATE and President of Jones International University

**14h30 - 15h00**

**Tea / Coffee**

**15h00 - 15h30**

**Discussion in plenary**

## **Session 4: Policy Issues Ahead and Next Steps**

*Chair: Mr John Martin, OECD*

In the light of the discussions in the three previous sessions, this session will focus on the key emerging policy issues regarding the developments in e-learning and trade in educational services and their impact on “traditional” post-secondary education.

- What are the immediate and long-term policy issues with regards to e-learning in post-secondary education?
- How can these issues be approached and what will be the roles of the key stakeholders (universities and other post-secondary education institutions, private sector, and policy-makers)?
- In particular, what could be the role of the OECD?

**15h30 - 17h00**

### ***Key Presentations***

- Presentation by a representative from post-secondary education (Mr Michel Averous, President, Université Montpellier II, France)
- Presentation by a representative from the private sector (Mr Veli-Pekka Niitamo, Director, Global Strategic Resourcing Nokia Corporation)
- Presentation from a policy maker (Mr Teiichi Sato, Advisor to the Minister of Education, Culture, Sports, Science and Technology, MEXT, Japan and Governing Board member of CERI)
- Presentation by OECD on the next steps  
Mr Donald Hirsch, Consultant, CERI, OECD  
Mr Jarl Bengtsson, Councillor, CERI, OECD

**7<sup>th</sup> OECD/Japan Seminar**

**on E-Learning in Post-Secondary Education:  
Trends, Issues and Policy Challenges Ahead  
June 5-6, 2001**

**LIST OF PARTICIPANTS**

## LIST OF PARTICIPANTS

OECD/JAPAN SEMINAR on E-Learning in Post-Secondary Education: Trends, Issues and Policy Challenges Ahead.

June 5-6, 2001 Tokyo

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MINISTRY OF EDUCATION, CULTURE, SPORTS, SCIENCE AND TECHNOLOGY , Japan  
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7th OECD/Japan Seminar

on

E-Learning in Post-Secondary Education:  
Trends, Issues and Policy Challenges Ahead

Presentation Papers

**OECD/Japan Seminar  
"E-Learning in Post-Secondary Education"  
Tokyo on June 5-6th 2001**

**Geoffrey M. Cox  
President, Cardean University**

I will describe some current trends in e-learning at the postsecondary level by focusing on four themes:

1. **The Age of Human Capital and the Demand for Higher Learning**

We are at the dawn of what Nobel Laureate Gary Becker calls the Age of Human Capital. Most of the wealth of nations and businesses is represented by people, not by capital equipment or other physical assets. Education is the most powerful way to enhance the value of human capital, but access to education is severely limited in most parts of the world.

2. **The Rise of the Internet**

The Internet has been adopted more quickly than any other communications technology, and has unique features as a learning medium. The Internet therefore is the one technology that can help deal with the gap between the demand for higher education and the supply of educational providers.

3. **New Interest in Learning and Pedagogy**

A renewed interest in the science of learning has improved our ability to create effective educational programs and services. Active, problem-based learning is vital. Working with new pedagogical models enhances power and potential of e-learning.

4. **The Necessary Components of Successful E-Learning**

The e-learning market is crowded with providers of various kinds of services: learning management systems, content providers, platform providers, authoring tools and multi-media software. None of these by themselves is sufficient for effective e-learning. A comprehensive system must involve all of these elements and more.

Cardean University, a subsidiary of UNext, works with some of the world's leading universities to create online courses and services in business, management and other professional areas. I will show some brief examples of our work to illustrate the points above and demonstrate our commitment to the highest standards of e-learning.

**'DESPERATE HOPE AND DESPERATE FEAR'<sup>1</sup>**  
**Cyberbole, Caution, and the Speculative Gulf Between**

*Trends in e-learning and lifelong learning*

*Key issues emerging*

*The place of the 'traditional' public university and its prospects*

**1. Seven introductory Points - the scope of our discourse**

- E-learning is a highly visible and often highly controversial subject.
- It is characterised by exaggerated claims and exaggerated fears, wishful thinking and deep scepticism.
- Sometime the use of terms is a source of confusion and crossed wires in communication— words like virtual and flexible for example
- It arouses great entrepreneurial hopes and great passions both ethical and 'conservative'
- There is an abundance of rhetoric, many well-articulated concerns, and a number of instinctually ideological as well as reasoned objections and sources of resistance
- It is influenced and complicated by still wider controversial issues confronting societies with choices: the meanings and impact of globalisation; the WTO, free trade and the 'Seattle protesters'; the corporatisation of universities
- We are deeply ignorant about e-learning and the new ICTs. There is little empirically tested knowledge about how e-learning works for different client groups (age, culture, intellectual ability, motivation, prior academic attainment, subject-matter). We need more sustained research and evaluation

**2. Six issues for clarification in analysing trends and prospects for e-learning**

- *The scope, meaning and applications of e-learning*  
From mixed or multi-mode learning opportunities for traditionally enrolled local and largely on-campus students through to global consortia offering (selling) distinctly or multi-badged degrees globally

---

<sup>1</sup> Hannah Arendt (1951 *The Origins of Totalitarianism*) cited by David Watson summing up the March 2000 CVCP Conference on The Business of Borderless Education.

- *Main markets sectors*  
School (K-12), post-secondary, tertiary and higher, continuing– the corporate training and adult (business) market– ‘informal’ learning outside institutions
- *Discipline and content fields*  
From courses through IT in IT to the MBA to other professional advanced updating to all fields of intellectual endeavour
- *The technologies*  
Self-directed-learning, time-flexible, synchronous- asynchronous, interactive etc.
- *The partners*  
Publishers, hardware and software producers, carriers, established institutions (brand) as well as learners, employers and brokers with claims to market share– and the gatekeepers
- *Projections*  
Massive expectations; disappointments and pitfalls along the way

### **3. Some Issues beyond the technical and commercial**

#### *Changing demography and the lifelong learner*

The growth of the twenty-five-plus earning-and-learning market

#### *The knowledge economy*

Who meets the insatiable demand and how?

Different players– complementarity or win-lose competition. Cherry-picking

#### *The knowledge society?*

Wider and longer-term needs. Non-market needs - ecological sustainability

#### *Sanctity zones*

Socio-cultural taboos versus liberalisation and the free market

Social and cultural formation of (young) children– the compulsory education phase

The use of education as an entry point for e-commerce

Learning in whose time?– the invasion of time, space and privacy.

#### *Global and local*

Cultural issues and national characteristics

Local content – issues of principle - cultural imperialism - and issues of practice - relevance and fitness for purpose

#### *Mass markets and economies of scale versus customisation and diversity*

- towards diversity or standardisation?

*New inequalities within and between nations*

The digital divide– exacerbation or amelioration?

*Partnerships and alliances*

Uncomfortable bedfellows– sensitivities about partnership versus the need for scale of investment, and for different resources and kinds of expertise

*Student perspectives*

Clarity, frameworks, guidance and progression– the student as client, market and consumer – optimal choice, variety and flexibility?

**4. The ‘Traditional’ Public University?**

- The problem with idealisation and ideal types
- Key characteristics and roles– Bologna – Clark Kerr – estates of the realm? The conscience of society. Meaning-making
- The formative context for e-learning  
Taken-for-granted, familiarity, ease of fit, going with the flow– or dissonance
- Integration or bolt-on - towards new institutional forms?
- Impact of e-learning and IT – the virtual university is the university made concrete. Organisation dynamics; the university as college and community  
Proletarianisation - the fragmentation of academic roles and tasks
- Melbourne University and the Universitas 21 story.
- Brand distinction and the mass market– devaluing in a mass market  
the upside and downside of ‘brand’
- Whose degrees? – quality assuring fragments– from brand degrees towards the lifelong learning portfolio?

**5. Conclusion**

A place for diversity– lifelong learning in the knowledge-based learning society transforms the nature and availability of learning, opens diverse market opportunities, and requires diverse institutional forms and diversities of role and mission as well as mode.

*Chris Duke University of Auckland May 2001*

## **Annex - a sample of recent newspaper headlines**

Land of the forwardly mobile - Japan has been a lifelong inspiration

Demand for knowledge workers is to jump

Society is shifting university agenda

Three Ws the key to universities' online future

Institutions had better prepare to sell their wares

Generation E to embrace distance ed

Tangled web of online learning

Steadily down cyber road

European Commission \$27 million [or billion!] action plan to develop online education

Lecturers fear impact of e learning projects on jobs

Watch out for [private sector] scavengers [a South African vice-chancellor]

Machine minders of academic (the whiff of managerialism beyond the rush into unproven education technology)

The virtual university is the university made concrete

Distance education aggravated by unis existing organisation: US expert

Are we using IT or is it using us?

Push to set up website to beat online cheats

Melbourne embraces business arms merger

'Concerned' Toronto pulls out of Universitas 21

Academic superstars to shine online [alongside] Jobs go in distance learning [Ecollege and Unext]

MIT free online move puts global e-learning profitability in doubt

Can the net be made to serve democracy? Anthony Smith doubts it



matter of national policy, of the application of multimedia to higher education and distance education.

Furthermore, on November 18, 1997, the Cabinet Committee for Economic Measures announced "Emergency Economic Reform to Pioneer the 21st Century."

This report focused on a plan for economic structural reform, with deregulation as its central issue, and dealt with reform in the field of education as well as in info-communications, welfare and health care, employment and labor, finance, and distribution and transportation.

With regard to the use of multimedia in higher education, the plan endorsed:

- Promotion of networks using inter-university satellite communications;
- Research & Development (R&D) of content and methods of education delivered using multimedia at the National Institute of Multimedia Education (NIME) and provision of the results to institutions of higher education; and
- More active use of multimedia in higher education.

In December 1997, the University Council proposed that up to 30 of the 124 credits needed for graduation should be achievable by distance learning.

This can involve various types of information communication, such as text, speech and still/moving images that are interactively communicated in real time. No attempt was made to set a limit for master's courses. The Council also proposed the establishment of a correspondence graduate school system.


These recommendations were implemented in fiscal year (FY) 1998. Further, in the October 26 report entitled "University in the 21st Century and Future Innovation Strategy -- Competing with Individual Characteristics," the University Council proposed that up to 60 credits be exchanged between universities and up to a further 60 be accredited from multimedia-based "distance classes." This proposal was implemented in FY 1999.

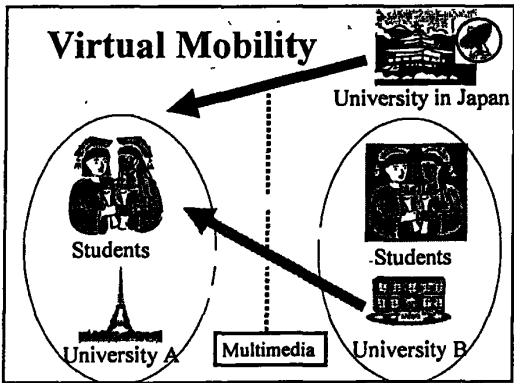
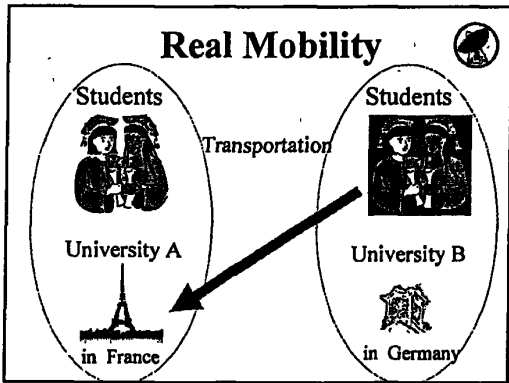
In November 2000, the University Council compiled a report entitled "Higher Education Required in the Age of Globalization," suggesting that accreditation should be granted to courses using the Internet for up to 60 units of credit, that correspondence universities should be allowed to provide complete courses (i.e. 124 units of credit) via the Internet, and that the Internet should be used to support courses of study as well as to develop new teaching materials, etc. Following these suggestions, it was established that up to 60 credits could be accredited in the form of Internet learning in attendance universities, and that all 124 credits required to obtain a bachelor's degree

# Trends and Issues of e-Learning in Japan

SAKAMOTO, Takashi  
Director-General  
NIME



The slides with  mark on the right top corner will be shown on the screen.



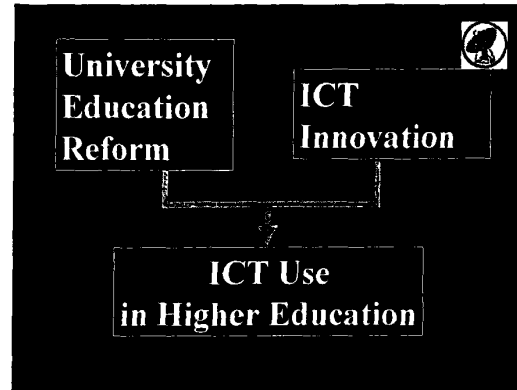
### University

- 124 units for undergraduate
- Up to 60 units by Video conferencing System or by Internet

### University by Correspondence

- Up to 94 (Printed Materials, Video Conf, TV, Internet, F to F)
- Up to 30
  - ┌ 20 (Broadcasting, Internet, F to F)
  - └ 10 (Internet, F to F)
- All 124 units can be learned or taken via Internet.

Recent Trend of National Policy  
Educational Policy for  
Achieving an Advanced ICT  
Society  
(Described in the paper)



Basic Law on the Formation of  
an Advanced Information  
Telecommunication Network  
Society  
Jan. 6, 2001

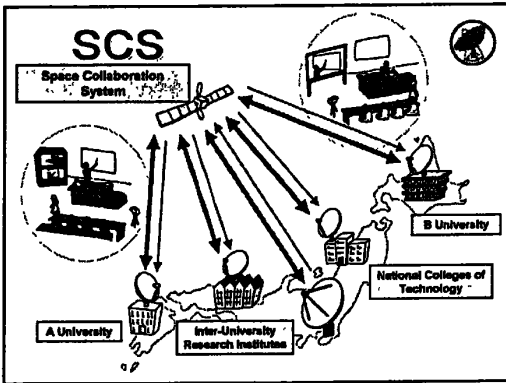
Advanced Information and  
Telecommunications  
Network Society Promotion  
Headquarters  
Jan. 22, 2001

**e-Japan Strategy**  
Improving the Information  
Literacy of All public  
Reinforce IT Education System at  
all levels of Schools  
Enrich Lifelong Education and  
Information for all adults.

Promoting Strategies for News  
Information and Communication  
Technology  
in Life Long Education  
Council for Lifelong Learning  
November 28, 2000

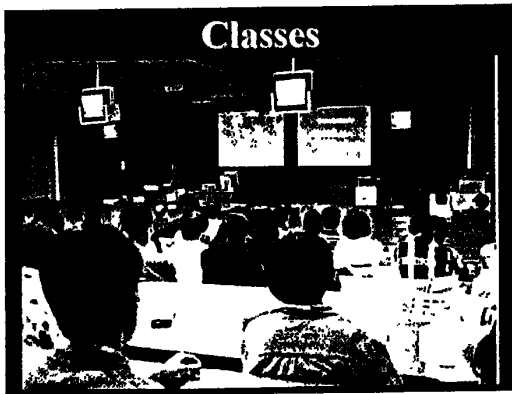
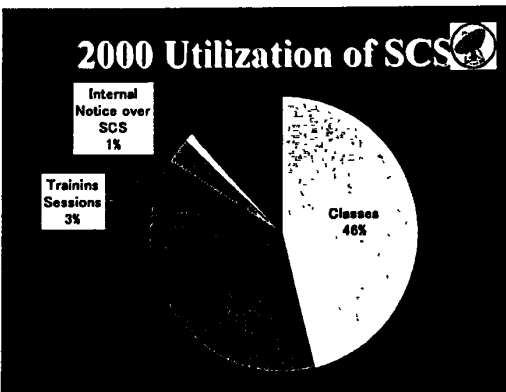
## ICT use in Higher Education

1. Interactive Satellite Communication
2. Internet, Video conferencing system
3. One way Satellite Broadcast.

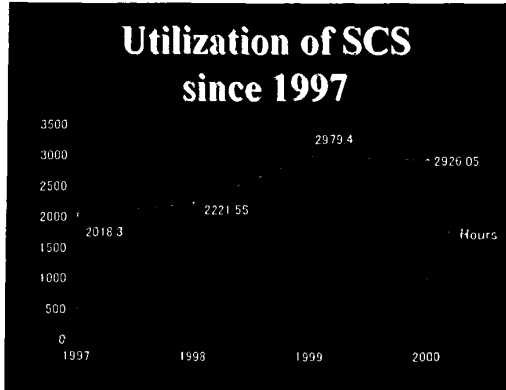


### 2000 SCS Participants

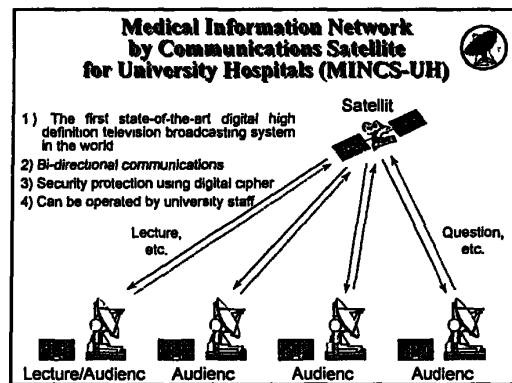
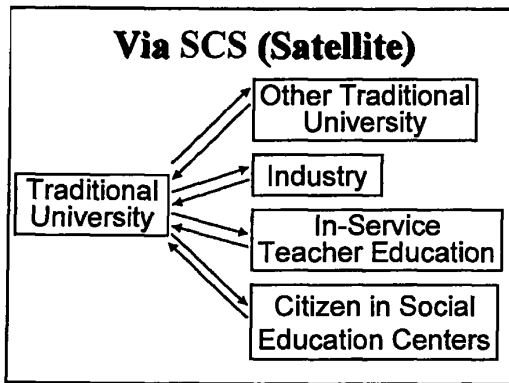
Category	No.	VSAT
National University	81	103
National 2 yr. C.	1	1
Private U.	13	14
Technical C.	14	14
Res. Inst.	11	13
University of the Air	3	5
<b>Total</b>	<b>123</b>	<b>150</b>



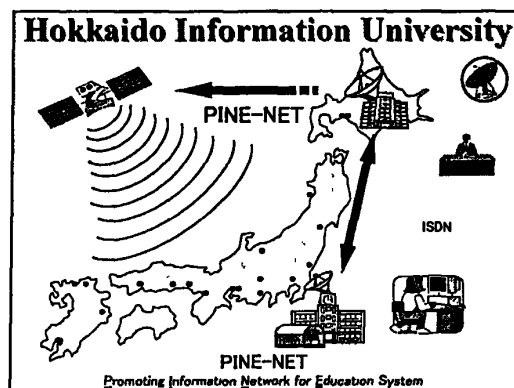
Conference.  
6%



- ### Cost
- HUB Station US\$ 3.6 million
  - Local VSAT US\$ 0.6million/1VSAT
  - Telecommunication  
US\$500/1hour



- ### HIU 16 Sites
- CS
  - Video Conferencing System



## CS Broadcasting



- University of the Air
- Toa University
- el-Net Open College

## University of the Air

All subjects are taught by  
RTV  
except Physical Exercise

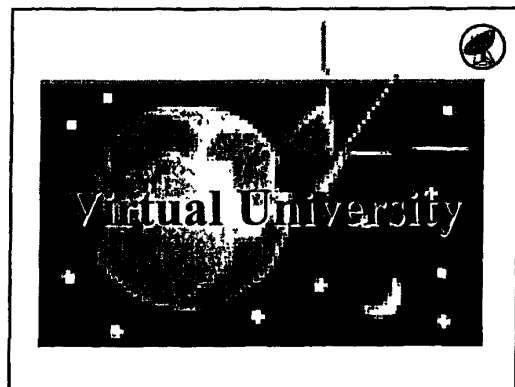
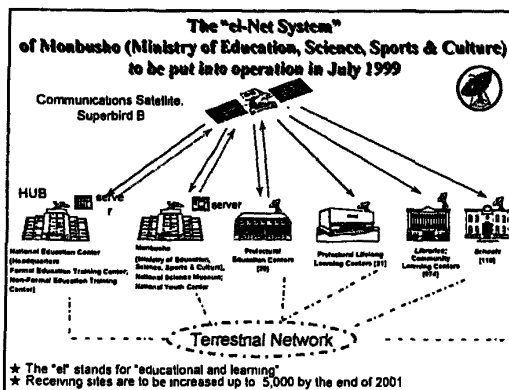
## University of East Asia

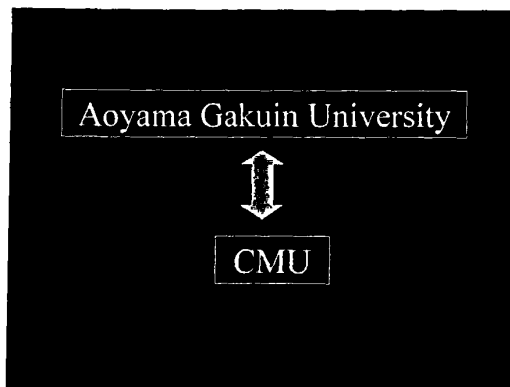
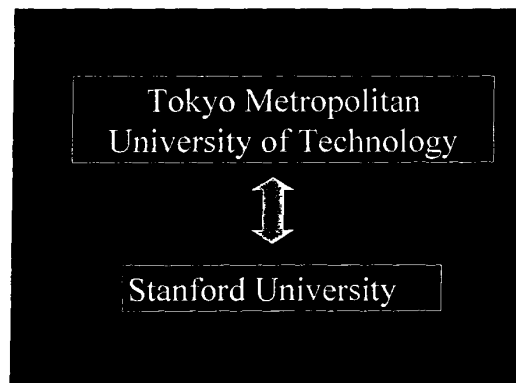
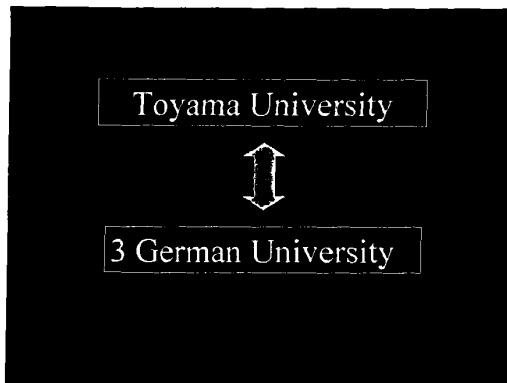
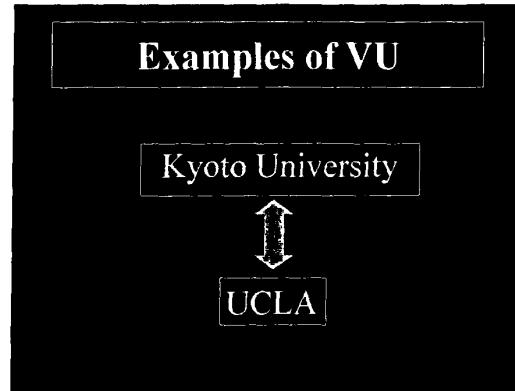
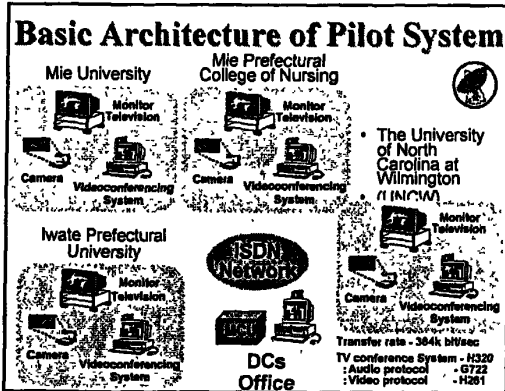
6:00-24:00, everyday

- TV Programs after 17:00 for  
the regular graduate course
- TV Programs before 17:00  
for University extension

## el-Net Open College

51 University  
173 courses





**Virtual University  
Research Forum**

**7 series,  
SCS Panel Discussions**

**Topics**

1. Present State of VU in Japan
2. Present State of VU in the World
3. University Reform and VU
4. Business Model

5. University Linkage across Boarder
6. Research and Technology
7. Recommendations

**Virtual University  
Research Forum**



**Issues to be solved at**

1. Individual Universities
2. Universities as a whole
3. Faculties
4. Business and Society
5. Public and Private Sectors  
(Described in the paper)

**Multimedia Use  
in Higher Education**

**in National Universities  
(66% Reply, 1999)  
(63% Reply, 2000)**

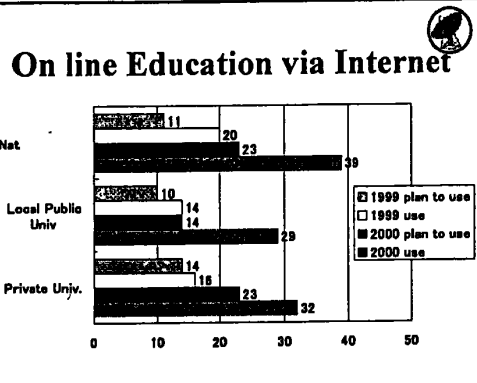


**Summary of the Survey**



- Use of traditional media  
(video, Library DB, B.B. etc)
- Gradual shift to the use of internet  
and multimedia  
(Described in the paper)





### Media Use in the National Universities

	(%)	1999	2000
1	VTR	88	80
2	Data Base for Books	87	74
3	e-mail, Bulletin Board for administratio	83	92
4	Presentation by PC	74	78
5	Task via Internet	60	59
6	Instructional Merial via Internet	56	-
7	Discussion via BB, e-mail	54	59
8	audio cassette	53	55

### Use of Multimedia (%)

	1999	2000
Satellite	41	39
Telecommunication	33	28
Online course	20	39

### Fields of Multimedia Use -via Satellite-

	(%)	1999	2000
1	Research Seminar	34	32
2	Graduate Education	29	26
3	Undergraduate Education	26	21
4	Extention Course	20	12
5	Meeting	20	25

### Fields for Multimedia Use -via ISDN-

	(%)	1999	2000
1	Meeting	26	26
2	Undergraduate Education	25	13
3	graduate educaiton	21	18
4	Research seminar	21	20

### Fields for Multimedia Use -via Internet-

	(%)	1999	2000
1	Undergraduate Education	20	35
2	Graduate Education	14	33
3	Liberal Art and Science	10	19
4	Extention Course	9	16
5	Research Seminar	7	21

### Purpose of Multimedia Use

	(%)	1999	2000
1	Educational Effectiveness	95	95
2	Publicity	90	96
3	Presentation of Activities	90	93
4	Motivation	90	88
5	Administration	86	86
6	Use of New Technology	83	85

### Obstacles for the use

	(%)	1999	2000
1	Heavy Loads for Specialists	98	97
2	Shortage of supporting staff	97	97
3	Cost	95	95
4	Shortage of Devices	93	89
5	Maintenance Cost	92	91
6	Time for Preparation	88	87
7	Shortage of Instructional Materials	78	85
8	Shortage of Media Literacy in University Teaching	67	60

### CD-ROM

- English
- Teacher Training
- Engineering
- Nurse Science

### DVD

- Teacher Training
- English

### Summary of the Survey

- Insufficient Infrastructure
- Growing needs for Multimedia Resources
- Need for raw educational materials

### Data Base

- Copyright Handling
- Instructional AV materials
- Statistic Image from Program of UA
- Media Education Products

### Infrastructure (%)

Video	30
Internet	27
CD-ROM	26
DVD-Video	8
DVD-Rom	7

### Adoption of New Media Resources

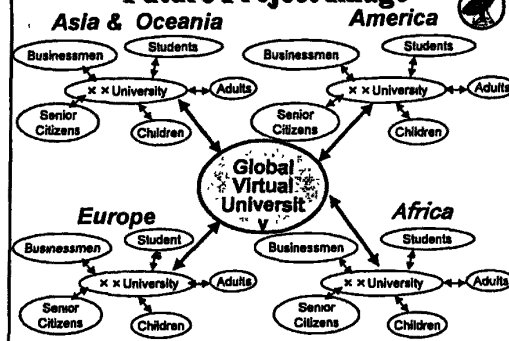


2000 (1999)	National Univ.	Local Public Univ.	Private Univ.
Satellite	59 (64)	12 (13)	18 (21)
ISDN	50 (53)	33 (39)	33 (47)
Internet	62 (32)	43 (25)	55 (30)

### Expected Instructional Materials (%)

Web Based Instructional Materials	30
CD-Rom	21
DVD-Rom	18
DVD-Video	16
Video	15

### Future Project Image



### Concluding Remarks



#### A • General Trends

1. Some progressive universities use CS, videoconferencing and Internet for education.
2. Generally still insufficient
3. Restricted to video, DB of Printed materials, e-mail to enhance administrative efficiency

### B • Recent Development



1. Presentation via PC
2. Use of e-mail for communication and evaluation
3. Shift from CS and terrestrial media to internet

### **C•Issues**



1. National universities are generally ahead of public local and private universities.
2. Heavy burden on specific individuals
3. Shortage of staffs, budget and facilities.

### **Multimedia**



#### **Overcome barriers of**

- Space
- Time
- Cost to Travel

### **Multimedia actualizes**



- Approach to Knowledge World Wide
- Virtual mobility of Students and Teachers.

**University Reform  
has been initiated  
in Space and Network**



**7<sup>th</sup> OECD/Japan Seminar**

**on E-Learning in Post-Secondary Education:  
Trends, Issues and Policy Challenges Ahead**

**June 5-6, 2001**

**Programme of Workshop**

10 May 2001

**Themes for the two parallel workshops  
at the OECD/Japan Seminar on E-Learning in Post-Secondary Education  
-Trends, Issues and Policy Challenges Ahead-  
June 5, Tuesday 2001**

The aim of the two parallel workshops in Session One at the above mentioned seminar is to provide an opportunity for deeper analysis and more intense exchange among the participants, building on the presentations and plenary discussion in the morning.

The overall theme for the two workshops is the same as Session 1 at the seminar: "Trends in e-learning in post-secondary education". As well as looking at the general trend of e-learning policies in various countries, the aim of the workshop is to give a specific focus on legal actions or systems for acknowledging and regulating cross-border e-learning in post-secondary education. The outcomes of the workshops will also contribute to the discussion on 6<sup>th</sup> June on quality assurances.

The three below mentioned issues will be discussed at the two parallel workshops. Participants from each country participating at the seminar will be asked to prepare a note of 1-3 pages for the seminar responding to the issues and themes mentioned below. If more than one participant is coming from the same country, it is suggested that one common country note is prepared for the seminar. The country notes will be made available for all participants at the seminar.

Please send the note to Mrs. Mariko Kuroiwa, OECD (E-mail: [mariko.kuroiwa@oecd.org](mailto:mariko.kuroiwa@oecd.org)) *before 1<sup>st</sup> June, 2001 (Friday)*. In case this would not be possible, participants are asked to have the note with them for the seminar in Japan.

**a) Scope and trends of e-learning policies in post-secondary education**

Do your country have an estimate of the national market size of e-learning in post-secondary education? If yes, do you have an estimate of its growth rate over the last three years?

Have your government launched any larger initiatives in the area of e-learning in post-secondary education during the last two years? If yes, which? Have universities with or without private partners launched major e-learning initiatives in post-secondary education during the last two years?

**b) The legislative framework for e-learning**

The legislative framework for e-learning is based on both national and international legislation. At the international level general rules or agreements concerning e-commerce as for example consumer protection and private privacy are also of relevance for e-learning activities. The same is true for intellectual property right and copyright rules. Furthermore, there are international

initiatives as for example by the European Parliament concerning the protection of children of harmful and violent Internet sites.

What are the existing national legislative regulations related to e-learning in post-secondary education in your country? Do your country have plans for introducing national regulation of cross-border e-learning initiatives? In case yes, what are the aim, scope and contents of these regulations?

**c) Quality assurance mechanisms**

What quality assurance mechanisms are in practice concerning e-learning in post-secondary education in your country? Are there any attempts in your country (institutional/regional/national/international) of creating new such mechanisms? Which of the existing international attempts to establish an international quality framework in post-secondary education according to you is the most promising?

**OECD / Japan Seminar on “E-learning in Post-Secondary Education: Trends, Issues and Policy Challenges Ahead”, Tokyo, 5-6 June 2001**

**“Trade in Educational Services: Trends and Emerging Issues”**

**By**

**John P. Martin\***

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\* I would like to acknowledge the extensive help provided by Kurt Larsen in preparing this note and helpful comments from Rosemary Morris.



Globalisation is one of the great buzzwords of to-day. For some, it is a harbinger of great benefits to individuals and economies, for others it is a great scourge. Until recently, education has been absent from the debate on globalisation because it is essentially a non-traded service. But this is no longer the case. There is growing trade in certain education services (see below). In addition, negotiations on the General Agreement on Trade in Services (GATS) began in January 2000 under the auspices of the World Trade Organisation (WTO) in Geneva. Over 70 negotiating proposals on a wide range of service sectors have been submitted so far, including one for education services.

When OECD Education Ministers met in Paris in April, they discussed, among other topics, the issue of trade in education services. Their discussions revealed very divergent views about the benefits of trade in educational services, the desirability of including the sector in multilateral trade negotiations and the degree to which liberalisation initiatives aimed at expanding trade in educational services should be tolerated. However, they gave a mandate to the OECD to examine the implications of internationalisation in both the demand for competences and the supply of education and training services, including trade in educational services.

My presentation will focus on three main issues. First, I give a brief overview of what we know about the current size of trade in educational services on a global scale. Second, I describe the present state of play with the on-going negotiations on trade in educational services in the WTO. Finally, I will highlight some important policy challenges that arise from trade in educational services.

#### 1. The scale of the international market in educational services

The first point to make is that we have very little reliable data about the levels and content of trade in educational services. The two main statistical sources are: (i) statistics on international trade in

educational services; and (ii) statistics on foreign students in tertiary education. One problem with the former source is that educational services are classified under several headings and are often combined with data on other services. Furthermore, many countries do not specify trade in educational services separately in their trade statistics. I refer you to the background note prepared by the OECD Secretariat for this meeting for further details on definitions and data sources.

(a) International services trade data

In the OECD database on international trade in services, seven countries have reported data on "Personal travel, educational-related activities": Australia, Canada, Mexico, New Zealand, Poland, United Kingdom and United States. These countries include four major "exporters" of trade in educational services, namely Australia, Canada, the United Kingdom and the United States.

However, it is important to bear in mind that data on "Education-related personal travel" underestimate the total trade in educational services. Such data do not include sales from companies and institutions delivering educational services abroad, e.g. cross-border corporate training or sales from cross-border e-learning (GATS mode 1). They also exclude the earnings from affiliated companies and institutions in educational services (off-shore activities, mode 3) and the travel of educators abroad to provide services (mode 4). Unfortunately, it is usually impossible to identify the size of these trade flows in educational services in the existing international trade statistics of OECD countries. However, evidence from several case studies suggests that trade flows in cross-border e-learning, cross-border corporate training, and off-shore education activities are growing significantly, although in many cases from a low level. There is only scattered evidence about these activities, e.g. 35 Australian universities reported 750 offshore programmes with 32,000 students in 1999. Seventy-five per cent of UK universities had at least one overseas validated course corresponding to about 140,000 students during the 1996/97 academic year.

Even allowing for the downward bias in the data, the partial picture shown in the background note is revealing. I would highlight four stylised facts. First, there is trade in education services at present even if the bulk of the output of the education sector in OECD countries is non-traded. Second, the vast bulk of this trade concerns the tertiary sector. Third, this trade has grown over the past decade, though it does not appear to have kept pace with the growth of total services exports in most cases. Finally, while the United States is the largest exporter of trade in educational services, it is not the leading OECD exporter if we put such trade flows into the context of total services trade. If we take the share of exports of educational services as a percent of total services exports as a rough indicator of “revealed comparative advantage”, Australia appears to be the most competitive exporter in this market followed by New Zealand, the United Kingdom and the United States in that order.

#### b) Data on the numbers of foreign students

The statistics on foreign students studying abroad are another useful indicator of the size of the international education market. Data from the OECD publication *Education at a Glance* show that five countries (Australia, France, Germany, the United Kingdom, and the United States) attract more than eight out of ten foreign students studying in the OECD area. The United States is the largest receiving country of foreign students with 32 per cent of the total, followed by the United Kingdom (16 per cent), Germany and France (13 and 11 per cent, respectively) and Australia (8 per cent).

The major countries sending students to study abroad, i.e. importing educational services, are often non-OECD countries. China (including Hong Kong) accounted for almost 9 per cent of all foreign students studying in OECD countries in 1998, followed by Malaysia (3.8 per cent) and India (2.8 per cent). Other South-East Asian countries are also very active in sending students to OECD countries: 5 per cent of all foreign students originate from Indonesia, Singapore, and Thailand. Among all foreign students studying in OECD countries, Greek, Japanese and Korean students comprise the largest proportion of

students from other OECD countries, each representing about 4 to 5 per cent of all foreign students, followed by Germans, Turks, French and Italians. Together, these countries account for 25 per cent of all foreign students in OECD countries.

## 2. WTO negotiations on trade in educational services

Contrary to some misconceptions that the whole of the education sector is likely to be subject to multilateral trade disciplines under the GATS, it is important to note that, if any liberalisation in trade in educational services is to occur, it appears that it will be confined to the higher education sector and adult education and training. Current indications are that most WTO Members prefer to not liberalise in basic education services. However, it is also important to note that, to date, only one detailed proposal on liberalisation of trade in educational services from the United States has been submitted at the negotiations at the WTO on trade in services. Further details on this are available in another background paper prepared by the OECD Secretariat.

Educational services are already covered in the GATS<sup>1</sup>. However, education remains one of the sectors where WTO Members have been least inclined to schedule liberalisation commitments. To date, 29 countries (counting the European Union as 15 countries) have made commitments for at least one education sector. Most of the commitments have been made in higher education and adult and other education.

Several negotiating sessions at the WTO on trade in services are scheduled for the rest of this year (July, October, December), with a view to assessing negotiating progress in March 2002. Until now,

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<sup>1</sup> All services are covered under the GATS except those supplied in the exercise of governmental authority (the so-called "public services carve-out provision" in article 1(3)). Allowing private operators to co-exist with public services providers in the same sector does not bring those public services into competition with private suppliers, hence they remain outside the purview of the GATS.

no formal sectoral negotiating groups have been established nor have any deadlines for requests and offers been set in the WTO negotiations on trade in services. It is therefore possible that the WTO members will start to form informal groups by sector. This will allow countries with a particular interest in specific proposals to meet to address that sector in greater detail. It is difficult to judge at this stage whether such discussions will actually take place for trade in educational services and when.

### 3. Policy challenges posed by trade of educational services

In sum, any multilateral liberalisation of trade in educational services is unlikely to involve the compulsory schooling systems. In addition, further multilateral liberalisation of trade in higher education services, adult education and training, if it does occur, is still a long way off. But this does not prevent exporting countries taking unilateral or bilateral initiatives to expand their market shares which involve liberalisation, e.g. by reducing barriers to the temporary stay of students, still the principal means of trade in the education sector.

In conclusion, I would like to highlight four major policy issues arising from trade in educational services:

(i) Absence of an international quality assurance and accreditation in higher education. There is no agreed international quality framework for higher education. There has been several attempts to establish one but so far only some regional agreements are in place in order to define international standards for providers of higher education and at the same time guarantee some consumer or learner protection. The Bologna declaration and the recent meeting of European Education Ministers in Prague on a European Higher Education Area are clearly steps towards the establishment of a common quality framework in an enlarged European Union. However, the underlying issues are very difficult and a common quality framework is still a long way off, even within the EU Member States let alone among the wider OECD community.

Behind the very different national assurance and accreditation systems across OECD countries are often different cultural values and understandings of what is important in higher education. Nevertheless, there needs to be some general international quality framework in order to ensure that foreign students, their parents and tax payers can be confident that they are getting a quality higher education. It is notable that this particular issue was highlighted by OECD Education Ministers on all sides of the debate about trade in education services.

(ii) Impact of e-learning providers on the established higher education market. The potential of cross-border e-learning could be very large. Much has been said and written about the huge market potential of e-learning, but in reality it has proven to be much more difficult and costly to produce high-quality e-learning courses which can attract a significant number of students and make a profit for their providers. Nevertheless, the cross-border e-learning market is growing fast but from a low starting point. E-learning will, without any doubt, influence the future development of trade in educational services. First, it will increase the number of students taking courses abroad. Second, it will certainly accentuate the need for an agreed international quality framework for higher education. Finally, it might reduce the rate of growth in international student mobility.

(iii) The regulation of foreign providers of post-secondary education. As long as there is no agreed international quality framework and/or rules governing trade in for post-secondary education and training services, there will be national concerns to regulate providers of post-secondary education from other countries. The growing cross-border e-learning activities will accentuate national concerns to regulate these activities. But any regulation of foreign providers of services raises issues of equal treatment with domestic providers of these services<sup>2</sup>.

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<sup>2</sup> It is important to note in this context that the GATS explicitly recognises the sovereign rights of governments to regulate in order to meet national policy objectives. In addition, the flexibility inherent in the way the Agreement is structured allows Members to not only choose the sectors and modes of supply for which they want to grant market

(iv) Intellectual property rights of learning material. With growing trade in higher education services goes increased international competition between universities and other institutions of higher education across borders. In this situation, universities may be tempted to seek to protect their learning materials and reputation through intellectual property rights. In this regard, I would like to draw your attention to an important precedent set by MIT recently. MIT has decided to make available nearly all their course materials on the Internet free of charge over the next ten years. This initiative is an interesting way of attracting prospective students to MIT. But note that this initiative does not give access directly to an MIT degree. Students will still have to be enrolled and pass the prescribed exams to get an MIT degree. Nonetheless, it is a very promising way of sharing knowledge and learning on a global scale.

#### 4. Concluding remarks

In sum, whether one likes it or not, there is growing trade in higher educational services. The forces of comparative advantage have already identified some OECD countries that are leading net exporters of such services and other countries can reap the potential gains from such trade. Technology is also likely to have a major impact on this trade in the future. At the same time, there are very real concerns about the potential threats posed to cultural values and national traditions by such trade. In addition, both sides to the debate -- those countries calling for more open trade in higher education services and those who wish to minimise it -- agree on the need to develop new and more appropriate quality assurance frameworks world-wide.

Education Ministers and the education community as such are often not very much involved in the discussions and in the public debate in general on these issues. The OECD Education Ministers have asked the OECD to play a broker role in bringing the education community more "up to speed" on what is

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access, but equally the conditions of market access, or in the case of unequal treatment post-establishment, conditions on national treatment.

happening on this issue. In the long run, the active involvement of the whole education community will be needed if progress is to be made in obtaining a balanced international agreement on trade in educational services. It is our hope that this meeting will contribute to this process. It is our intention at OECD to organise further meetings for the education community on this topic as the situation evolves.



# **Trade in Educational Services: Trends and Emerging Issues**

**John Martin**

**Director**

**OECD/DEELSA**

**7th OECD/Japan Seminar on e-learning,**

**June 5-6, 2001, Tokyo**

**My presentation:**

- 1. The size of the “beast”**
- 2. Current state of play at the WTO**
- 3. Key policy challenges**

# The size of “the beast”

## a) Data on services trade

### Education-related personal travel \$US millions 1970-1999 - Credits (Export)

	1989	1997	1999
Australia	584	2190	2030
Canada	530	595	703
Mexico	..	44	47
New Zealand	..	282	209
Poland	..	16	26 (1)
United Kingdom	2214	4080	4464 (1)
United States	4575	8346	9572

.. Data not available.

(1) Data refer to 1998.

Source: OECD Trade in Services Statistics

# The size of “the beast” (cont.)

Exports of education-related personal travel as a percentage of total trade in services, 1989-1999

	1989	1997	1999
Australia	6.6	11.8	11.6
Canada	3.0	1.9	2.0
Mexico	..	0.5	0.4
New Zealand	..	6.6	4.9
Poland	..	0.2	0.2 (1)
United Kingdom	4.5	4.3	4.5 (1)
United States	4.4	3.5	3.8

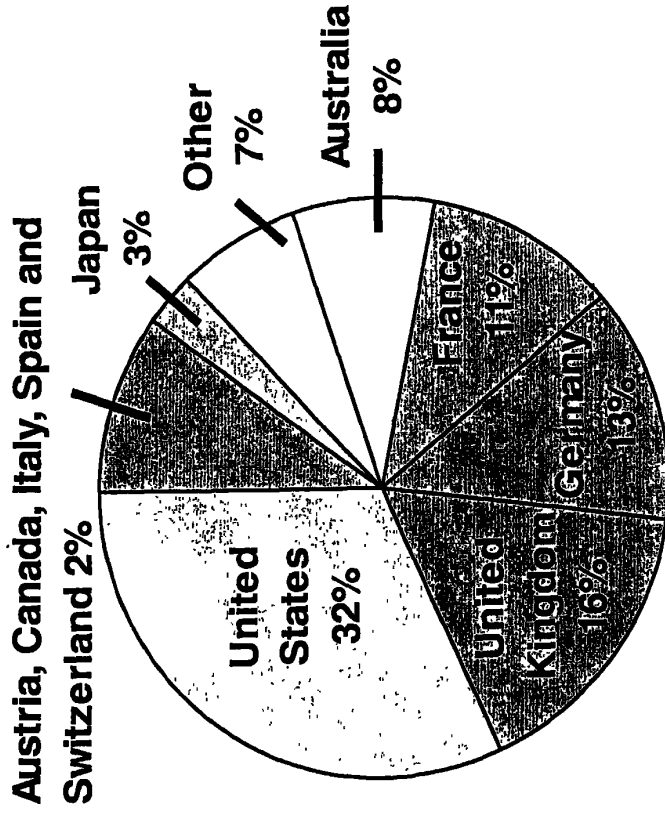
.. Data not available.

(1) Data refer to 1998.

Source: OECD Trade in Services Statistics

## The size of “the beast” (cont.)

### b) Data on student flows, 1998



Source: OECD (2000): *Education at a Glance*

- 1.3 million international students
  - 43% from OECD countries and 57% from non OECD countries
  - Main countries of “origin”: China, Japan, Greece, Korea, Malaysia, Germany, Turkey, France, Italy, India, Indonesia, Singapore, Thailand

# WTO negotiations on trade in educational services

- So far, only one proposal on trade in educational services from the US has been submitted to the WTO
- Educational services are already covered under GATS
- General agreement that liberalisation proposals will be confined to trade in higher education services, adult education and training

# WTO negotiations on trade in educational services

- Several meetings at the WTO on trade in services are scheduled over the coming year
- Until now, no formal sectoral negotiating groups on trade in services have been established nor have any deadlines for the negotiations been set

# Key policy challenges

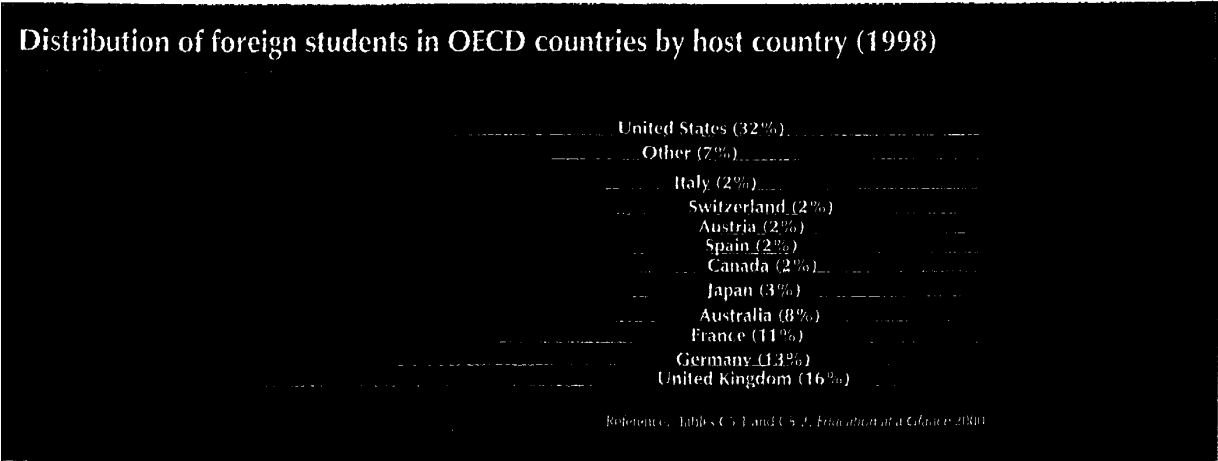
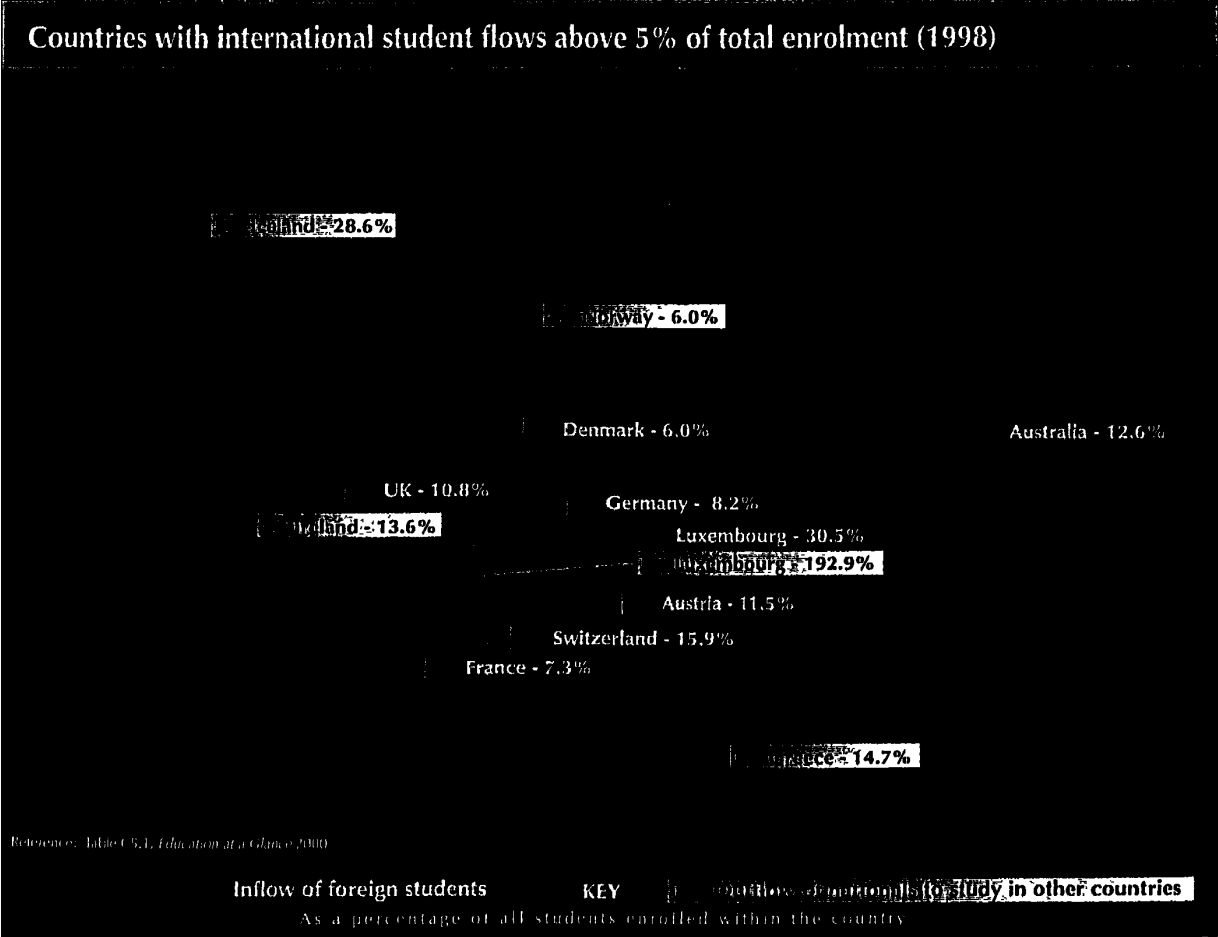
- **Absence of agreed international quality framework**
  - Need for international/national standards for providers?
  - Need for international/national consumer protection?
- **Impact of e-learning providers**
  - the conflict between hype and reality
  - most e-learning activities of universities are targeting national markets
  - partnerships with global range offer local provision which could reduce international student mobility



# Key policy challenges

- **National concern to regulate foreign providers**
  - national temptation to regulate foreign universities and companies operating off-shore
  - cultural differences are behind regulations
  - how to regulate in a “virtual world”?
- **Intellectual property rights of learning material**
  - balance between free and restricted access to learning materials

# Study patterns (2): Studying abroad



Only in a few small OECD countries do significant proportions of students go abroad to take up studies at the tertiary level, but a wider range of them have substantial student inflows from other countries, within and beyond the OECD area.

**I**ncreasing globalisation creates more incentives to study abroad and reduces the barriers to doing so. Among the “pull” factors encouraging foreign study are the advantages of learning about other cultures and the reputation of particular universities and courses. “Push” factors include restrictions in the types of programmes available or access to them in the student’s own country.

With few exceptions, education remains a service that is primarily consumed domestically rather than “traded” internationally, with the percentage of foreign students in OECD countries ranging from below 1% to around 16%.

Five countries - Australia, France, Germany, the United Kingdom and the United States - attract eight out of ten foreign students studying in the OECD area. Proportional to their size, Australia, Austria, Switzerland and the United Kingdom show the largest net inflows of foreign students.

In the OECD as a whole, 44% of foreign students come from Asia, and 31% from Europe, although this varies greatly according to the receiving country: in Australia, three-quarters of foreign students are Asian; in Austria and Switzerland, four-fifths are European; in France, nearly half are from Africa. (These figures, however, only refer to students with known origins.) A substantial proportion of students who come to study in OECD countries are from poorer regions outside the OECD area.

Fewer students leave one OECD country to study in another. Two of the five countries where more than 5% of students choose to do so are small countries (Luxembourg and Iceland) with limited home institutions.

Looking at within-OECD exchanges of students, it is interesting to consider which countries manage to attract more students than they “lose”: this is one indicator of the success of their institutions. Excluding the special case of Luxembourg, the biggest net inflows are to Switzerland, the United Kingdom and Austria, and the biggest net outflows are from Greece, Iceland and Ireland. Besides student flows across borders, other issues, such as

the internationalisation of curricula and international electronic delivery of educational content are also relevant to the internationalisation of education.

### What the map shows

“Student inflows” show the percentage of students enrolled in a tertiary education institution in a country who come from other countries.

“Student outflows” shows how many people originating from the country are pursuing tertiary studies abroad, in other OECD countries (data on people studying outside OECD countries are unavailable). The outflow is expressed as a percentage of all students enrolled within the country, and can thus exceed 100% - where foreign study exceeds domestic enrolment.

Students are classified as foreign students if they do not hold the citizenship of the country for which the data are collected. The data are collected through the host countries, not through the sending countries, and therefore relate to incoming students to a particular country, rather than to students from that country going abroad. Students studying in countries which did not report to the OECD are not included in this indicator. As a consequence, all statements on students studying abroad underestimate the real number of students abroad, since non-OECD countries and non-reporting countries are excluded.

**Meeting of the OECD Education Committee at Ministerial Level  
2-4 April 2001**

**Trade in Education Services: Benefits and Risks**

**Background Paper prepared by the OECD Secretariat for the Education Ministers'  
Informal Lunch Discussion**

**Tuesday, 3 April 2001**

## Overview

Education, along with health and other social services, is a politically sensitive sector for multilateral trade negotiations and one of the most-often targeted for anti-GATS/WTO criticism. Almost all countries view education, at least up to a certain age level, as an essential social service and provide state-funded education on a compulsory and universal basis. The main variations between countries' education regimes concern the level at which the proportion of state funding and public delivery decreases and the degree to which private education is available. Mixed systems, allowing the choice between public and private schooling, are common. A number of countries have recently experimented with various means of promoting competition as a means of raising the quality of public education.

A wide range of activities falls under the heading of education services. Categories are traditionally made by drawing distinctions between levels - primary, secondary, tertiary - and sources of funding - public, private, mixed. Other education services include private tutoring, specialised instruction (e.g. language and vocational) and educational testing. New educational activities are emerging in response to developments in domestic and international market structures, such as education counselling, curriculum design, course evaluation, and student exchange services.

International trade in higher, adult and "other" education services is expanding and diversifying rapidly, despite the low level of GATS commitments undertaken during the Uruguay Round. In the United States, the education sector is ranked fifth in terms of services export revenue, accounting for 4% of total services revenue in 1999<sup>2</sup> and over US\$14 billion of export receipts in 2000<sup>3</sup>. In Australia approximately 150,000 foreign students attended the country's universities in 2000, and in the year 1999-2000 education services exports reached an estimated US\$3.2 billion<sup>4</sup>.

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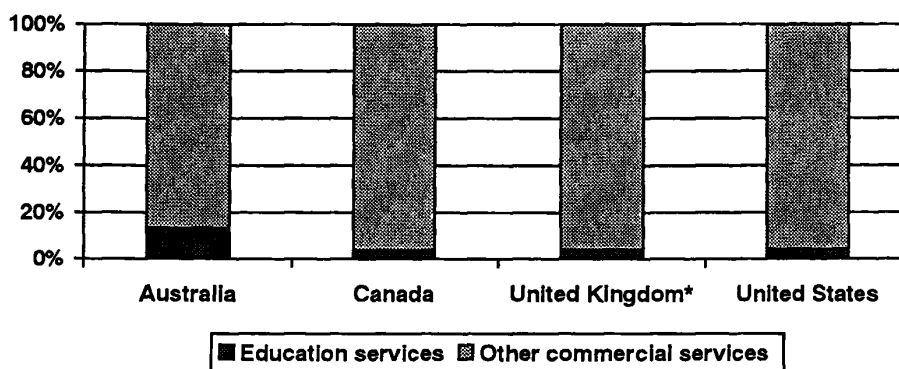
<sup>1</sup> For example, a new policy involving public-private partnerships in the management of secondary schools in Britain was announced in February 2001. Limited to failing schools, the programme envisages the country's secondary schools becoming more responsive to students' needs through the implementation of schemes such as business-led specialist schools, church schools and private-sector backed City Academies; *Financial Times*, "Blair signals landmark shift in schools policy", February 12, 2001.

<sup>2</sup> WTO, *International trade statistics 1999*, 1999 and United States National Committee on International Trade in Education, <http://www.tradeineducation.org>.

<sup>3</sup> United States National Committee on International Trade in Education, <http://www.tradeineducation.org>.

<sup>4</sup> Australian Department of Foreign Affairs; <http://www.dfat.gov.au>.

**Education services exports as a percentage of total commercial services exports in selected principal exporting countries, 1998**



\*1995-96; estimate.

Source: WTO, *International trade statistics, Annual Report 1999 and 1998*; OCDE/CERI, *L'internationalisation de l'enseignement supérieur* (unpublished paper), 2000; Australian Education International (<http://www.aei.detya.gov.au>).

The globalisation of the tertiary education market is resulting in changing industry structures, characterised by consolidation of actors through new international consortia of universities and alliances between universities and corporations.<sup>5</sup> Governments are increasingly adopting initiatives to enhance their exports in this sector, such as student exchange programmes, bilateral education agreements and international initiatives for recognition of courses, programmes and diplomas.

The largest share of cross-border trade in education services occurs at the tertiary level, through the travel of international students to study at foreign universities (GATS mode 2). Investment or establishment-related trade in education (mode 3) is also assuming increasing importance, as universities and teaching institutions increasingly seek to establish campuses and teaching facilities abroad.<sup>6</sup>

With the development of electronic commerce and a corresponding expansion of distance learning as suppliers make use of new and enhanced information and communication technologies, (such as cable and satellite transmissions, audio and video conferencing, CD-ROMs and Internet), pure cross-border trade (mode 1), traditionally associated with modes 2 and 3, is becoming more significant.<sup>7</sup> Finally,

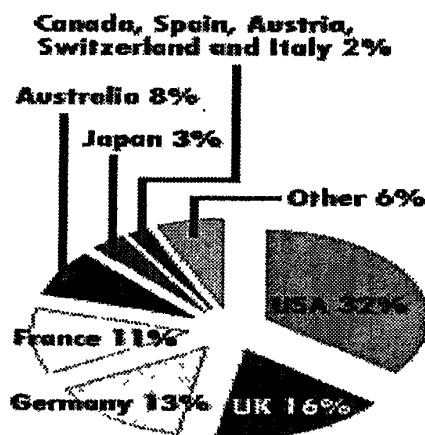
<sup>5</sup> Business Times (Malaysia), *Providing education not a government monopoly anymore*, 12 February 2001.

<sup>6</sup> In Australia, for example, over a third of new overseas enrolments in 1999 were accounted for by enrolments in offshore facilities; Australian Education International, *Overseas Students Statistics 1999, 2000*; see <http://www.aei.detya.gov.au> for extracts.

<sup>7</sup> E.g. Duke University in the United States offers a "Cross Continent" MBA programme that has a large on-line tuition component, allowing enrolment and participation of foreign students without requiring them to move to the

mode 4 is also relevant, as the market for “scholarship”, whereby scholars travel abroad to teach on a temporary basis, has become truly global in scope. The principal exporter of education services is the US; other major exporters are France, the UK, Australia, and Canada.<sup>8</sup>

In terms of trade in education services via the travel of foreign students, in 1998 the US was host country to 32% of foreign students in OECD countries, followed by the UK, Germany and France:



Source: OECD, *Education at a glance – education indicators*, 2000.

## Education services and the GATS

### (i) Classification and commitments

Education services are covered under chapter 5 of the GATS classification system.<sup>9</sup> Its sub-division into five sub-sectors - (A) primary, (B) secondary, (C) higher, (D) adult and (E) other - reflects traditional market structures, delimitations which, as noted earlier, are fast changing with the growth of trade and investment in this sector, the application of new technologies, the advent of e-commerce and the emergence of new service offerings. Education remains one of the sectors where WTO Members have

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United States. "Internet-mediated learning" is combined with residential learning sessions in a number of the university's facilities established abroad.

<sup>8</sup> OECD, CERI, *International trade in professional and education services: implications for the professions and higher education*, 1998.

<sup>9</sup> The Services Sectoral Classification list is based on the Provisional UN Central Product Classification (CPC). The CPC divides education into five broad sub-sectors, with sub-sectoral divisions, e.g. the third sub-sector "higher education services" is sub-divided into two sub-categories: post-secondary technical and vocational education services, and other higher education services.

been least inclined to schedule liberalisation commitments. To date, only 29 Members (counting as one the schedule of the EC member states) have made commitments for at least one education sub-sector.

"Basic" education services, typically primary and secondary education services provided by state authorities, are generally exempted under the GATS article I 3 (b), which denotes exceptions for services "supplied in the exercise of government authority."<sup>10</sup> For this reason, commitments to open national markets were primarily undertaken in the sub-sectors of higher, adult and other education. More than half of the 29 schedules contain commitments of full market access in modes 1, 2 and 3 for adult and other education sub-sectors, whereas only a quarter of schedules contain full commitments for primary, secondary and higher education sub-sectors.<sup>11</sup> As the table below illustrates, full market access is accorded most often in modes 1 and 2.

<sup>10</sup> GATS article I 3 (b). I 3 (c) provides that "any service which is supplied neither on a commercial basis, nor in competition with one or more service suppliers" is such a service.

<sup>11</sup> WTO, *Education services - background paper prepared by the Secretariat*, (S/C/W/49), September 1998.



Education services sub-sector	Total number of Members <sup>12</sup>	Mode 1 (cross-border supply)			Mode 2 (consumption abroad)			Mode 3 (commercial presence)			Mode 4 (presence of natural persons)		
		Full <sup>13</sup>	Partial <sup>14</sup>	Unbound <sup>15</sup>	Full	Partial	Unbound	Full	Partial	Unbound	Full	Partial	Horizontal <sup>16</sup>
Primary education services	21	11	4	6		1	3	7	12	2	-	1	
Secondary education services	23	12	6	5		3	1	7	14	2	-	1	
Higher education services	21		3	2		1	2	7	12	2	1	1	
Adult education services	20		2	1		1	-	15	4	1	3	-	
Other	12		2	-		-	-	6	4	2	-	2	

The darker the shading, the higher proportion of Members making the type of commitment (full, partial or unbound).

Adapted from WTO, *Education services - background paper prepared by the Secretariat*, (S/C/W/49), September 1998.

<sup>12</sup> Counting the EC 12 as one schedule.

<sup>13</sup> Full commitments, i.e. no limitations listed (without consideration of limitations that may be listed in the horizontal section.)

<sup>14</sup> Partial commitments, i.e. limitations listed.

<sup>15</sup> Unbound.

<sup>16</sup> No sectoral commitments were taken for this mode; schedules refer to those taken in mode 4 of the horizontal section.

*(ii) Trade barriers*

The principal barriers to trade in education services are measures that restrict the entry and temporary stay of students, such as immigration and foreign currency controls. For trade via commercial presence (mode 3), barriers that often apply are inability to gain the required licences (e.g. to confer degrees), foreign participation limitations, economic needs tests<sup>17</sup>, restrictions on the recruitment of foreign teachers, subsidies provided solely to local institutions, local partner requirements and discriminatory tax treatment. For mode 4, most Members chose not to make sectoral commitments, and instead refer to their horizontal commitments taken for this mode. Those who made mode 4 commitments in the sector scheduled few or no limitations.<sup>18</sup>

A more subtle but significant indirect barrier is that of accreditation difficulties for foreign degrees when the foreign student returns to his/her home country. This is important not only for a student's choice of institution, but for other service sectors. The entry of health or other professionals into foreign markets, for example, often depends upon the recognition of their qualifications. GATS article VII provides for negotiation of agreements between Members for mutual recognition. This article tries to strike a balance between encouraging Members to extend recognition of education, experience obtained, licences and certifications, and avoiding discrimination between Members and its trade-distorting effects. Either by agreement or unilaterally, Members may extend this sort of recognition, however they must allow other Members the opportunity to negotiate similar agreements or demonstrate that education, experience, etc. gained in their territories should be recognised.<sup>19</sup>

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<sup>17</sup> An economic needs test is a test imposed by a government at the national or sub-national level in order to determine whether or not to allow new service suppliers entry into the market, based on an assessment of need. Often a significant market access barrier, these tests may operate to restrict entry of foreign suppliers, or to restrict the establishment of all new suppliers in a particular sector, regardless of origin.

<sup>18</sup> Haiti, Mali, Rwanda, Trinidad and Tobago, and Turkey.

<sup>19</sup> Several mutual recognition agreements have been notified under article VII (4), e.g. the Washington Accord, an agreement providing for mutual recognition between signatory bodies of engineering accreditation processes.

**Background note**  
**prepared by the OECD Secretariat**  
**on**  
**Trade in Educational Services:**  
**What can we learn from existing data?**

Information and data about the level and content of trade in educational services are scarce and difficult to evaluate. This note uses existing data from the OECD database on International Trade in Services and from OECD/INES on foreign students in tertiary education to give an overview of the approximate scale of this trade. The note is a preliminary draft and it is important to be aware of all the statistical caveats mentioned in order to get a reliable picture of the size of international trade in educational services. The preliminary note is divided into three sections: 1) Methods of compiling the statistics; 2) Main trends in the trade of educational services; and 3) Concluding remarks on gaps in our knowledge about trade in educational services.

**1. Methods of compiling the statistics**

**Trade in services statistics**

Statistics on trade in educational services are classified under several headings and often together with other activities. It is therefore not easy and sometimes impossible to identify “trade in educational services” using this statistics. The trade data used in this note was collected according to the OECD/Eurostat classification. In this classification, “trade in educational services” are counted for under the following headings:

- (1) 242 Personal travel, Education-related expenditure;
- (2) 936 Miscellaneous business, professional, and technical services. Other.

The first category mentioned above consists of educational services where individual students pay a tuition fee to education institutions (students studying abroad). This corresponds to mode 2 (consumption abroad) in the WTO classification of different modes of supplying goods and services across borders. Estimates of foreign students' expenditures in the country are made by multiplying the number of students by average expenditures per student. Receipts consist largely of expenditures for tuition and living expenses for foreign students enrolled in a country's universities and colleges. Payments consist of tuition and living expenses of students for study abroad.

The second category mentioned above does contain trade on educational and training services in so far that the services are provided on a contract or fee. This category contains, for example, employee training or

educational testing services provided by a foreign company or institution. It also contains the service provided by a manufacturer where the foreign customer buys training service as part of the delivery, maintenance or installation of a good. And finally, it contains cross-border e-learning activities in companies and educational institutions. It is not possible in the OECD database to separate trade in educational services from a number of other trade categories included in "936 Miscellaneous business, professional, and technical services. Other". This second category corresponds to mode 1 (cross-border supply) in the WTO classification of different modes of supplying goods and services across borders.

Within the international trade statistics it is furthermore not possible to separately identify the earnings from universities and companies present in another country (offshore activities). The sales by these "foreign affiliates" are not included in the international trade statistics according to international rules for collecting trade data. Only their earnings are recorded in the accounts as international transactions, and here they appear as "income" rather than "services". This category corresponds to mode 3 (commercial presence) in the WTO classification of different modes of supplying goods and services across borders.

It should also be noted that trade according to mode 4 (Presence of natural persons - a person (professor, scholar, teacher, etc.) entering another country to provide an educational service) in the WTO classification is not accounted for in the trade in services statistics unless there are earnings from this activities that are transmitted to another country.

#### Statistics on foreign students in tertiary education

In the OECD/INES statistics on foreign students in tertiary education, students are classified as foreign students if they do not hold the citizenship of the country for which the data are collected. The data are sampled in the host countries, not through the sending countries, and therefore relate to incoming students to a particular country, rather than to students from that country going abroad.

Students studying in countries which did not report to the OECD are not included in the statistics. As a consequence, all statements on students abroad underestimate the real number of students abroad, since non-OECD countries and non-reporting countries are excluded. In the 1998 statistics, e.g. on foreign students in tertiary education, there are no data for the following OECD countries: Belgium (French Community), Greece, Mexico, the Netherlands, and Portugal. In the 1999 statistic only data from Greece and Portugal are missing. The foreign students are normally counted on a specific day or period of the year.

Not all foreign students in tertiary education can realistically be considered as a "credit" or "export" in the trade in services and balance of payment statistics. Although Germany is a high-ranking destination for foreign students studying in the OECD countries, the actual number of non-resident students (or students who attended upper secondary education in another country) registered in German higher education institutions accounts for only two-thirds of all foreign students. This is because of a significant number of "domestic foreigners", consisting mainly of children of "guest workers" who, despite having grown up in Germany, are considered "foreign" in this statistics. A quarter of all foreign students in Germany have ethnic origins in Greece, Italy and Turkey.

## **2. Main Trends in the trade of educational services**

### Using trade in services statistics

In the OECD database on international trade statistics in services, seven countries have reported data on "Personal Travel, education-related activities": Australia, Canada, Mexico, New Zealand, Poland, United Kingdom and United States. Among these countries are four major "exporters" of trade in educational services, namely Australia, Canada, United Kingdom and United States. The tables 1 to 4 show the

educational services measured as the receipts or payments of foreign students studying abroad corresponding to the category “242 Personal travel, Education-related expenditure”.

As mentioned in the previous section on “Trade in services statistics” this corresponds only to mode 2 (consumption abroad). Nevertheless, the largest share of cross-border trade in educational services occurs through the travel of international students to study at foreign universities, and this indicator is therefore often used to estimate the overall level of trade in educational services. As we shall argue later in the note, this estimate becomes less and less accurate as other forms of trade in educational services (e.g. e-learning and corporate training) are growing rapidly.

As it can be seen from Table 1, the United States is by far the biggest “exporter” of educational services among the countries where we have data, followed by United Kingdom, Australia and Canada. Australia has over the period 1970-99, experienced a very high growth of educational services. Education has developed to be Australia’s eighth largest export industry, corresponding to 11-12 per cent of the total Australian trade in services (Table 2). In contrast, Canada has experienced a relatively lower growth in its trade in educational services than countries like Australia, the United Kingdom and the United States. The relative importance of trade in educational services as a percentage of total trade in services has thus fallen from 3 per cent in 1989 to 2 per cent in 1999 (Table 2).

**Table 1: Personal travel, education-related in billions \$US 1970-1999 - Credits (Export)**

	1970	1989	1997	1998	1999
Australia	6	584	2190	1844	2030
Canada	68	530	595	621	703
Mexico	..	..	44	49	47
New Zealand	..	..	282	211	209
Poland	..	..	16	26	..
United Kingdom	..	2214	4080	4464	..
United States	..	4575	8346	9037	9572

not available

**Table 2: Personal travel, educational-related as a percentage of total trade in services 1970-1999 - Credits (Export)**

	1970	1989	1997	1998	1999
Australia	0.6	6.6	11.8	11.4	11.6
Canada	2.7	3.0	1.9	1.9	2.0
Mexico	..	..	0.5	0.4	0.4
New Zealand	..	..	6.6	5.7	4.9
Poland	..	..	0.2	0.2	..
United Kingdom	..	4.5	4.3	4.5	..
United States	..	4.4	3.5	3.7	3.8

.. not available

However, most likely these tables underestimate and increasingly so, the total export and import of educational services. They do not include the educational services included in “936 Miscellaneous business, professional, and technical services. Other”. Nor does the tables include the earnings from affiliated

companies and institutions in educational services. On the other hand, other transactions in the current account partly offset these receipts. Surveys of foreign students in the US indicate that roughly three-quarters of their education are financed from sources abroad. The remainder, however, is financed from sources within the United States – through scholarships from colleges, universities, private corporations, or other non-profit institutions. These payments to foreigners are included in private remittances and other transfers in the trade statistics.

By comparing Tables 1 and 3 (the payment for students studying abroad), it is clear that Australia, Canada, the United Kingdom and the United States have a “trade surplus” in educational services. The major import countries of educational services are often non-OECD countries as will be shown below. Of all foreign students studying in the OECD countries in 1998, 43 per cent were from OECD countries and 57 per cent from non-OECD countries.

**Table 3: Personal travel, education-related in billions \$US 1970-1999 - Debits (Import)**

	1970	1989	1997	1998	1999
Australia	24	178	410	337	378
Canada	37	258	532	523	563
Mexico	..	..	44	49	47
New Zealand	..	..	..	..	..
Poland	..	..	41	48	..
United Kingdom	..	67	182	217	..
United States	..	586	1396	1591	1840

.. not available

**Table 4: Personal travel, education-related as a percentage of total trade in services 1970-1999 - Debits (Import)**

	1970	1989	1997	1998	1999
Australia	1.5	1.3	2.2	2.0	2.1
Canada	1.1	1.1	1.4	1.4	1.4
Mexico	..	..	0.3	0.4	0.3
New Zealand	..	..	..	..	..
Poland	..	..	0.7	0.7	..
United Kingdom	..	0.2	0.2	0.3	..
United States	..	0.7	0.9	0.9	1.1

.. not available

There exists only few data and little evidence about the trade in educational services other than mode 2. Tables 1-4 are only based on data from the category: "242 Personal travel, Education-related expenditure" (mode 2), because it is not possible to identify "other trade flows" of educational services from data available in the OECD database on international trade in services.

From the US trade statistics, it is however possible to get a bit more information on mode 1 trade (cross-border supply) in educational services. As part of the US Trade in Services Statistics, there is a category, entitled "training services", which contains sales of, e.g. employee training or educational testing by a US

company or institution abroad. The total amount of this activity is relatively small (only \$US 408 million in export and \$US 175 million in import in 1999) compared to the category 242. However, in the US trade statistics, it is not possible either to "isolate" trade in educational services when it is provided to a company or institution abroad as part of a delivery, maintenance or installation of a good, nor provided as a e-learning activity (mode1). The cross-border e-learning activities are most likely growing at a much higher rate than the number of students studying abroad. Increasingly, educational institutions, publishers, and ICT companies are teaming up to design and deliver e-learning courses on a variety of subjects. Large companies also are developing education and training courses to improve the skills of their employees and to keep them up to date. Again, we have very little information on these activities and how much of them are cross-border. It is estimated that there are 6,250 foreign "distance learning" students at Australian universities in the beginning of 2000 corresponding to 6 percent of all the foreign students the Australian universities. Moreover, the number of public-private partnerships in post-secondary education and corporate training is rising rapidly to match growing market prospects in an increasingly global e-learning market<sup>1</sup>.

The same is the case with mode 3 trade in educational services. According to a study done by the Australian Vice-Chancellors' Committee in May 1999, 35 Australian universities reported 750 offshore programs with 31,850 students. 89 per cent of them are in four countries: Singapore, Hong Kong, Malaysia and China<sup>2</sup>. It is furthermore estimated that 75 per cent of UK universities had at least one overseas validated course in 1996/97 corresponding to probably in the region of 135-140,000 students during the 1996/97 academic year<sup>3</sup>.

#### Statistics on foreign students in tertiary education

Five countries (Australia, France, Germany, the United Kingdom, and the United States) attract more than eight out of ten foreign students studying in the OECD area. It would therefore have been preferable to have trade in educational services data from France and Germany as well. We can, however, get a fairly reliable estimate of the trade in educational services in France and Germany, if we accept that the trade data are by and large estimated from the student flow. According to the OECD/INES 1998 statistics, the United States is the largest receiving country of foreign students (in terms of the absolute number of foreign students) with 32 per cent of the total, followed by the United Kingdom (16 per cent), Germany and France (13 and 11 per cent respectively) and Australia (8 per cent).

There are, however, differences in the level of tuition fees and living costs from one country to another within the OECD. Within the EU countries student fees are typically non-existent or low. The living expenditures by students studying abroad are, however, accounted for the international trade in services statistics under "242 Personal travel: education-related expenditure".

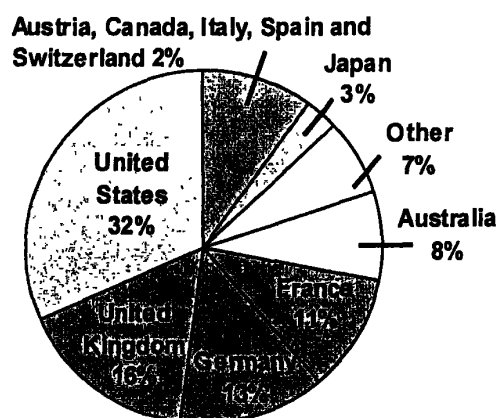
#### **Figure 1: Distribution of foreign students in OECD countries by host country (1998)**

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<sup>1</sup> OECD (2001): "E-learning – The Partnership Challenge", Paris.

<sup>2</sup> IDP Education Australia (2000): "Transnational Education Providers, Partners and Policy: Challenges for Australian Institutions Offshore".

<sup>3</sup> Idem p. 21.



Source: OECD (2000): "Education at a Glance"

Among all foreign students studying in OECD countries, Greek, Japanese and Korean students comprise the largest proportion of students from other OECD countries, each representing about 4 to 5 per cent of all foreign students, followed by Germans, Turks, French and Italians. Together, these countries account for about 25 per cent of all foreign students in OECD countries. China (including Hong Kong) represents 8.6 per cent of all foreign students studying in OECD countries, followed by Malaysia (3.8 per cent) and India (2.8 per cent). Other Southeast Asian countries are also very active in sending students to OECD countries, 5 per cent of all foreign students originate from Indonesia, Singapore, and Thailand<sup>4</sup>.

The OECD has also recently collected statistics on foreign students in tertiary education in 1999. There has been an increase in the number of foreign students enrolled in tertiary education in OECD countries from 1,31 million in 1998 to 1,42 million in 1999<sup>5</sup>. This corresponds to an increase in the number of foreign students studying in OECD countries of 7-8 per cent from 1998 to 1999.

### 3. Concluding remarks on gaps in our knowledge about trade in educational services

The aim of this note is to obtain an overview of the approximate scale of the trade in educational services. There is relatively good information on mode 2 trade in educational services (consumption abroad). Approximately 1,47 million foreign students were studying abroad in OECD countries in 1999. The average expenditure per year of students studying in the seven countries where we have data on "Personal travel, education-related" (table 1) is \$US 20,600 including fee payment and living expenditures. Given that these seven countries attract a bit more than 56 per cent of all foreign students studying in OECD countries, it can be assumed that the overall market in OECD of mode 2 trade in educational services is around \$US 30 billion in 1999<sup>6</sup>, corresponding roughly to 3 per cent of the total trade in services in OECD

<sup>4</sup> OECD, 2000: "Education at a Glance", Paris.

<sup>5</sup> These figures do not take into account that the 1999 data include data from Belgium, Mexico and The Netherlands, which was not the case for the 1998 data. If these countries are included, the total number of foreign students enrolled in tertiary education in 1999 in OECD countries is 1,47 million (only data of foreign students studying from Greece and Portugal are not included in the 1999 figure).

<sup>6</sup> The \$US 30 billions is calculated by multiplying the number of foreign students in tertiary education in OECD by the average expenditure of foreign student per year.



countries. This figure is an extremely rough estimate and must be taken with great caution. As we have mentioned, the average costs for students studying in Europe might be somewhat lower as student fees are typically non-existent or low. On the other hand the 1,47 million foreign students in OECD countries does only include tertiary student and not the number of foreign upper secondary and post-graduate students and adult learners.

As demonstrated in the note, there is very little information on the scale of the other forms of trade in educational services – mode 1 (cross-border supply), mode 3 (commercial presence), and mode 4 (presence of natural persons). There is some evidence that trade in educational services modes 1 and 3 are growing rapidly. In order to get a more complete picture on trade in educational services, there is thus a need to document trends in cross-border e-learning activities, the development of offshore education activities, and in general the trends towards public/private partnerships in the delivery of education and training.

**COMMUNICATION FROM THE UNITED STATES  
RE: HIGHER (TERTIARY) EDUCATION, ADULT EDUCATION AND  
TRAINING**

**I INTRODUCTION**

1. For consideration of all WTO Members, the United States presents this proposal on higher (tertiary) education, adult education and training services. At the outset, it is important to note that the proposal recognizes that education to a large extent is a government function, but that most countries permit private education to coexist with public education. The proposal, therefore, envisions that private education and training will continue to supplement, not displace, public education systems. This paper is intended to stimulate discussion and help liberalize trade in this important sector in the world economy.

**II IMPORTANCE OF HIGHER (TERTIARY) EDUCATION, ADULT  
EDUCATION AND TRAINING SERVICES**

2. Higher (tertiary) education (hereinafter referred to as **higher education**), adult education and training services are expanding rapidly, particularly through the use of the Internet. These services include academic and training courses on information technology; languages; executive, management and leadership training; driver education; and hotel and tourism education. They also include educational testing services and corporate training services. Many of these are practical courses for use on the job. Some can be used as credits toward degrees; and some are non-degree courses. Increasingly, educational institutions and publishers are teaming up with information technology companies and other experts to design courses of instruction on a variety of subjects. Large companies also are developing education and training courses to improve the skills of their employees and to keep them up to date on their latest products. Such services constitute a growing, international business, supplementing the public education system and contributing to global spread of the modern **knowledge economy**. Availability of these education and training services can help to develop a more efficient workforce, leading countries to an improved competitive position in the world economy.

**III PURPOSE**

3. The purpose of this proposal is to help create conditions favorable to suppliers of higher education, adult education and training services by removing and reducing obstacles to the transmission of such services across national borders through electronic or physical means, or to the establishment and operation of facilities (schools, classrooms or offices) to provide services to students in their home country or abroad. This would apply to countries that permit private education, not to countries that maintain exclusively public systems.

#### IV COVERAGE

5. The WTO Classification List (W/120) divides educational services into five parts: (a) primary education services; (b) secondary education services; (c) higher education services; (d) adult education; and (e) other education services. The scope of coverage of particular types of education (e.g., liberal arts, business, professional) is not specified. Clarification of the coverage is needed.

6. In terms of this proposal, Higher education includes all tertiary education (i.e., education beyond secondary education), adult education and training services. Such education and training encompass degree courses taken for college or university credits or non-degree courses taken for personal edification or pleasure or to upgrade work-related skills. Such education and training services can be provided in traditional institutional settings, such as universities or schools, or outside of traditional settings, including at workplaces, in the home, or elsewhere.

7. This paper proposes that coverage should clearly indicate that two types of services are included as part of the concept of education: (1) training services; and (2) educational testing services. Training services are particularly related to higher education, adult education and other education services, whereas testing services generally are related to all types of education.

- Training services are very similar to education services, but training courses are generally less theoretical and more job-related than academic courses, often requiring hands-on operation of tools, equipment and certain devices.
- Educational testing services are a fundamental and essential part of the learning process, used to evaluate the student as well as the course material. These services include designing and administering tests, as well as evaluating test results.

#### V PROPOSAL

8. This paper proposes discussion of various aspects of an open regime in the education and training sector. This would entail countries considering to apply existing GATS market access and national treatment disciplines, as well as additional GATS disciplines addressing sector-specific regulatory issues, including transparency and fairness of administration. Consistent with these disciplines, governments would retain the right to regulate to meet domestic policy objectives. Moreover, this proposal recognizes that in this sector, governments will continue to play important roles as suppliers of services.

9. In addition to clarifying the classification for education, this proposal for higher education, adult education and training services encompasses market access, national treatment and additional commitments. The proposal is limited to education and training

beyond the primary and secondary level and does not apply to primary and secondary schools. It recognizes that education to a large extent is a government function and it does not seek to displace public education systems. It seeks to supplement public education systems, affording opportunities for suppliers to make their services available to students in other countries. The intent is to help upgrade knowledge and skills through these educational and training programs, while respecting each country's role of prescribing and administering appropriate public education for its citizens. Although a small number of WTO members has made commitments in this area, nearly all members allow the provision of higher education, adult education and training services by private sector service providers.

10. This paper proposes that WTO Members who have not yet made commitments on higher education, adult education and training services formulate their commitments based on the list of obstacles identified below. Members are invited to inscribe in their schedules any limitations on market access and national treatment, as some Members already have done. Further, the paper proposes that all Members consider undertaking additional commitments relating to regulation of this sector. The United States has taken commitments for adult and other education, and is willing to consider undertaking additional commitments for higher education and training.

11. This proposal is not presented as a legal text, but rather as a list of obstacles identified in reviewing this service sector. Some items on the list may be market access restrictions, or national treatment limitations, or both. In addition, some obstacles, although not limitations on market access or national treatment per se, may result from regulatory provisions or other measures which make it difficult for foreign suppliers to market their services.

12. Obstacles in this sector

- Prohibition of higher education, adult education and training services offered by foreign entities
- Lack of an opportunity for foreign suppliers of higher education, adult education and training services to obtain authorization to establish facilities within the territory of the Member country
- Lack of an opportunity for foreign suppliers of higher education, adult education and training services to qualify as degree granting institutions.
- Inappropriate restrictions on electronic transmission of course materials
- Economic needs test on suppliers of these services
- Measures requiring the use of a local partner.
- Denial of permission for private sector suppliers of higher education, adult education and training to enter into and exit from joint ventures with local or non-local partners on a voluntary basis
- Where government approval is required, exceptionally long delays are encountered and, when approval is denied, no reasons are given for the denial and no information is given on what must be done to obtain approval in the future
- Tax treatment that discriminates against foreign suppliers

- Foreign partners in a joint venture are treated less favorably than the local partners
- Franchises are treated less favorably than other forms of business organization
- Domestic laws and regulations are unclear and administered in an unfair manner
- Subsidies for higher education, adult education and training are not made known in a clear and transparent manner
- Minimum requirements for local hiring are disproportionately high, causing uneconomic operations
- Specialized, skilled personnel (including managers, computer specialists, expert speakers) needed for a temporary period of time, have difficulty obtaining authorization to enter and leave the country
- Repatriation of earnings is subject to excessively costly fees and/or taxes for currency conversion
- Excessive fees/taxes are imposed on licensing or royalty payments

**The Choice between Delivery of Education and Trade in Education:  
“Can’t we have a little bit of both?”  
Summary of Presentation by Paul Cappon of the  
Council of Ministers of Education, Canada  
7<sup>th</sup> OECD/Japan Seminar  
6 June, 2001, Tokyo, Japan**

The Internet and other new information and communications technologies, the increasing mobility of capital, and the global trend toward liberalized trade have presented educators with the opportunity to reach beyond the physical walls of their schools and institutions to share – and export – their questions, perspectives, theories and knowledge with others, both at home and abroad.

Even before the advent of digital networks and complex trade agreements, educators and educational institutions (particularly at the postsecondary level) in Canada had been active in various aspects of the internationalization of education. Canada has traditionally been one of the top 10 host countries for international students, and Canadian educators are very interested in expanding their current presence in international education.

Given the enormous economic potential of e-learning, as well as the international trade in educational services (a recent estimate of the global education market is US \$2 trillion), it appears that the developed world has entered into a new era of learning. It is important to remember, however, that education is not simply another commodity, but is instead an integral part of human development: a national good reflective of social, economic, and cultural needs. The universal right to education is recognized by the United Nations.

This presentation brings data readily available to CMEC together with the views of various international education experts in Canada in an examination of pan-Canadian educational interests in the expansion of e-learning and the trade in education programs and services. This issue is examined through the following questions:

- What are the trends in participation by Canadian postsecondary institutions (namely universities) in the trade in education programs and services?
- What are the potential prospects and future directions for Canadian institutions in this area of activity?
- What various viewpoints, issues, and concerns with regard to education liberalization have been expressed by Canadian education professionals working in the area of international education?
- What is Canada’s position on education in the GATS negotiations?
- How can international trade in education services continue to expand, while the rights of governments to provide the best possible education for their own citizens are protected?

This presentation highlights the debate over the globalization of education that is occurring within Canada, and offers some examples of how Canadian jurisdictions are responding to the challenges of e-learning. This presentation also suggests how “knowledge-sharing,” which has been a key component of a number of Canadian on-line initiatives, can be applied at the international level.

# **The Choice between State-Provided Delivery of Education and International Trade in Education**

**Can't we have a little bit of both?**

**Paul Cappon**

Director General

Council of Ministers of Education, Canada

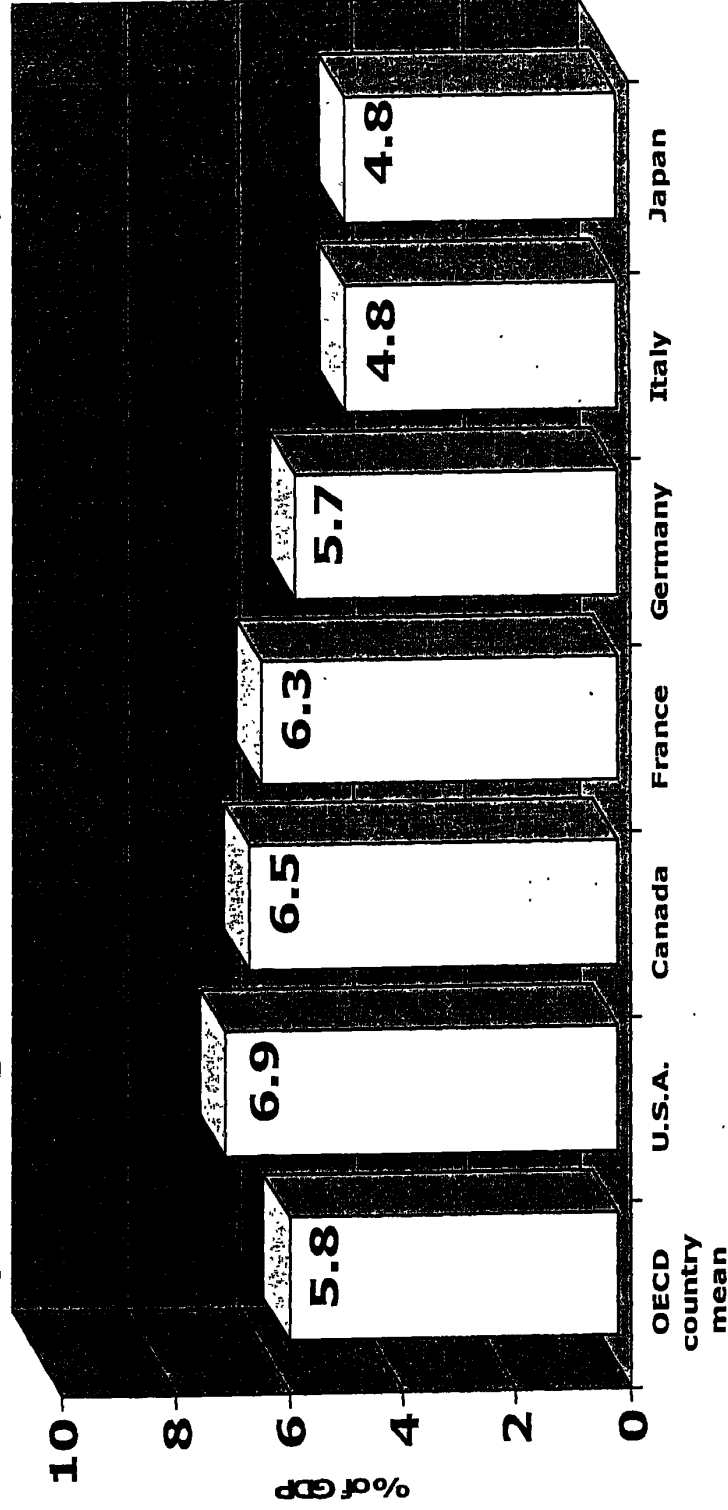
7<sup>th</sup> OECD/Japan Seminar

6 June, 2001, Tokyo, Japan



# Canada ranks among the leading countries in OECD in spending on systems of education

Educational expenditure for educational institutions as a percentage of GDP for Canada & G-7 countries, 1997



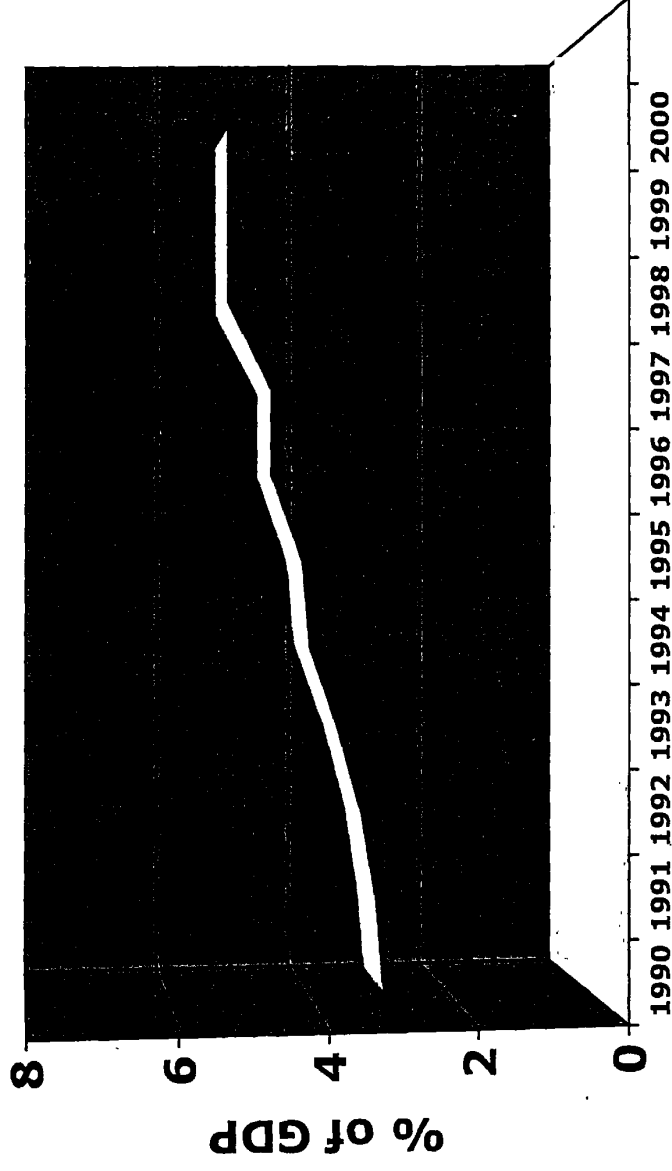
Note: Data not available for U.K. Source: OECD Education at a Glance, 2000 2



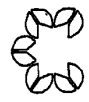


# Growing importance of trade in services to the Canadian economy

Trade in services as a percentage of GDP, Canada, 1990-2000

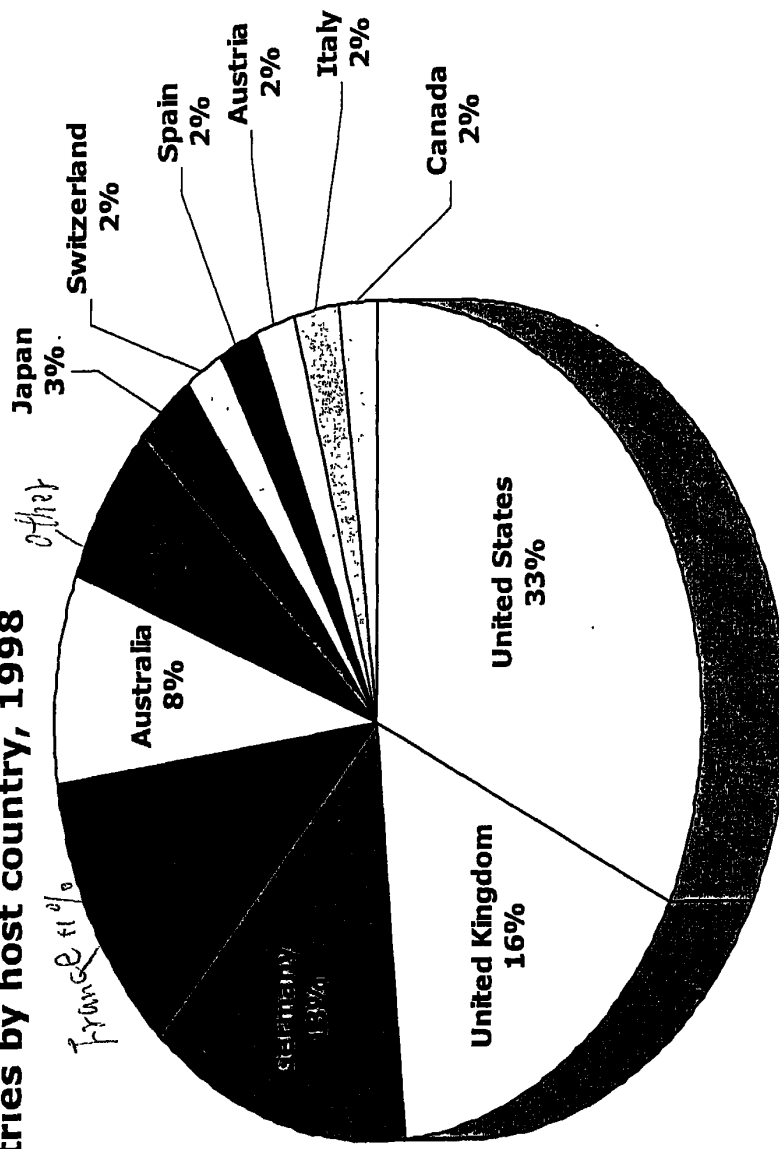


Source: DFAIT, Trade Update 2001: 2<sup>nd</sup> Annual Report on Canada's State of Trade 3



# Inflow of international students

Distribution of international students in OECD countries by host country, 1998



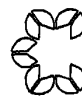
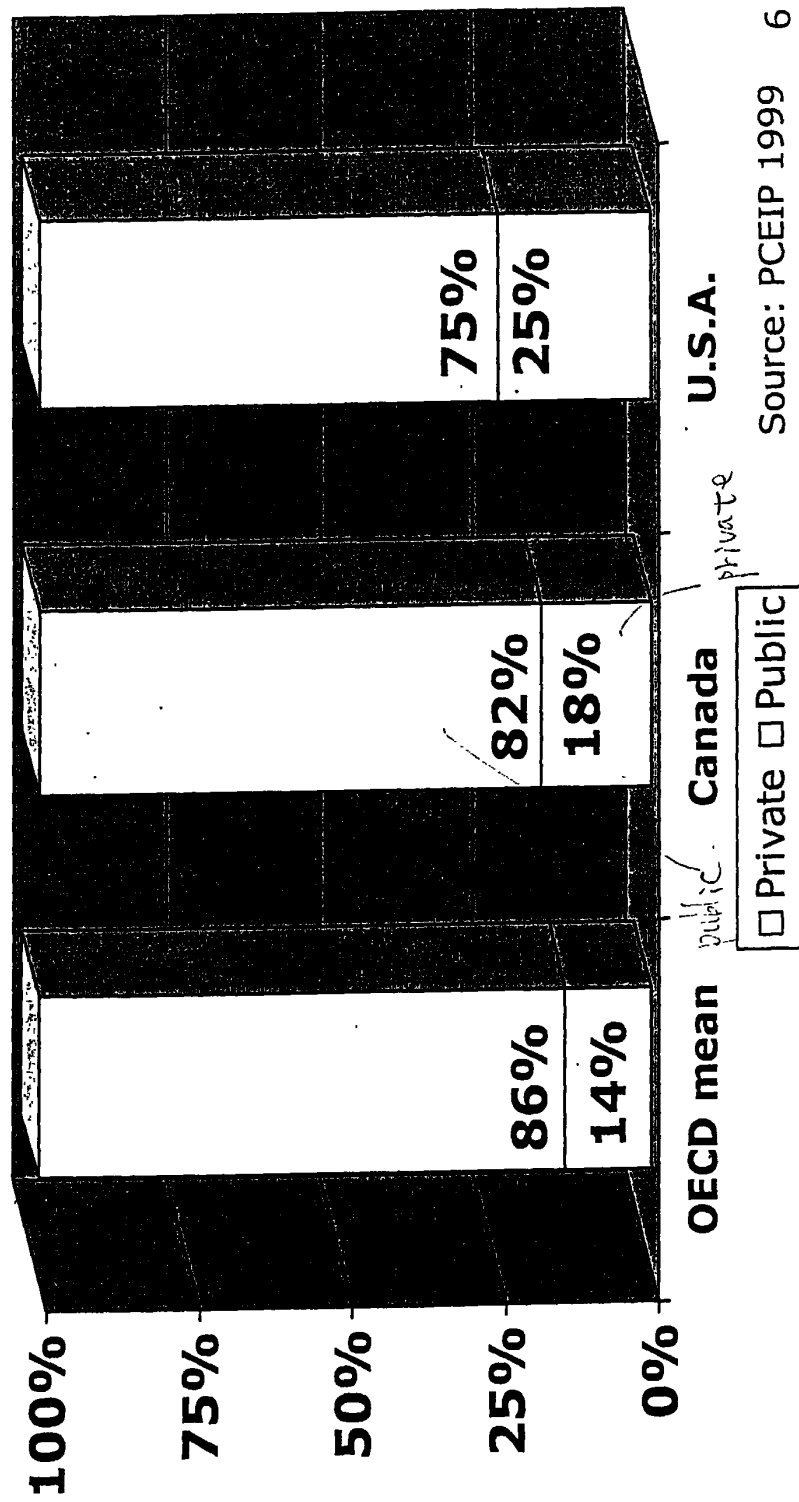
## Global trends in e-learning

- Global Internet users
  - will **triple to 638 million** by 2004
- Universitas 21
  - **500,000** students, **44,000** academics, combined operating budget of ~ **US \$9 billion**
- UK Open University
  - enrolls **21%** of all part-time UK postsecondary students
- **57%** of Canadian postsecondary institutions offer on-line instruction
- “Knowledge services”
  - **US \$2 trillion** global industry.



# Private-sector presence in Canadian education is above OECD average

Ratio of public/private sources of funds for educational institutions



## Common Priorities for Global Education

- Share **best practices** in e-learning
- **Support R&D** of cost-effective technologies to benefit developing countries
- **Improve connectivity**
- Create **centres of excellence** focusing on teaching and learning in the electronic environment
- Decrease the digital divide
- **Coordinate** on-line learning activities
- Collect on-line learning **data**
- Set **international goals**

