CHEA Institute for Research
and Study of Accreditation
and Quality Assurance

International Quality Review and Distance Learning: Lessons from Five Countries

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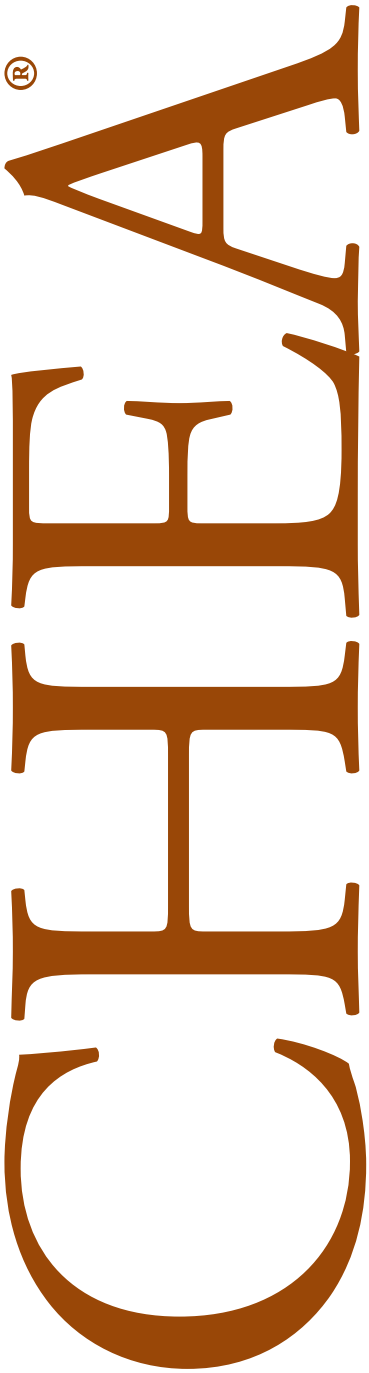
Prepared for the International Commission
of the Council for Higher Education Accreditation



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As part of its mission to promote quality assurance in accreditation of higher education institutions and programs, CHEA, from time to time, commissions and brings to public attention analyses of pertinent issues. Distribution of these papers, which do not necessarily represent CHEA's positions on the subjects addressed, is intended to foster broad and robust discussion of accreditation-related topics, in the public interest.

EXECUTIVE SUMMARY

1. Nature and focus of the study

1.1 This is a report on the quality review of distance learning in a sample of five countries. The report was commissioned by CHEA's International Commission in order to understand better the nature of existing regulatory arrangements in the context of growth in electronically supported learning and in the import and export of education world-wide.

1.2 The project was undertaken between November 2002 and December 2003 by Robin Middlehurst, and Steve Woodfield of the Centre for Policy and Change in Tertiary Education at the University of Surrey, UK. The data collected from readily available public sources was used to create country case studies for Jordan, Malaysia, Australia, Kenya and the UK which were subsequently verified by in-country experts. From the data and information collected, a summary report was produced in two parts. Part One summarises information and issues arising from relevant policy reports and academic literature. The sections of the report cover: context and terminology, approaches to quality review, agencies involved, review processes, and challenges and issues in the quality review of distance learning. The second part presents data from the case studies. After a brief section outlining the socio-economic context, educational system and policy context for each country, Part Two addresses the main themes of the project: the nature of distance learning in each country and the main providers, the nature of the regulatory and quality assurance systems as they apply generally and to distance learning in particular, and the relationship between trade in educational services (from an importing and exporting perspective) and arrangements for quality review.

1.3 It should be noted that the report was undertaken in a short space of time with a limited budget and without the benefit of in-country research. Only a small number of countries could therefore be included and the researchers are aware of gaps in the data caused by these factors as well as other difficulties of terminology and availability of data. The focus of the project is also on a topical and volatile policy issues where, in the absence of good data, rhetoric is strong. In addition, the national and international agenda related to quality review is dynamic and changes to systems are occurring regularly as countries adjust to globalisation and associated economic, technological and social developments.

Main findings

Distance learning

1.4 The nature and status of distance learning differs across our sample countries for geographical, cultural, historical and technological reasons. However, the amount of distance learning is both growing and becoming increasingly interconnected with other forms of provision such as face-to-face provision on and off-site, vocational education and training and transnational education. The term 'distance learning' has many synonyms (that often hide real differences in types of learning and forms of delivery) and is growing wider in scope as it embraces new forms of provision delivered by a variety of providers alone or in collaboration.

1.5 There are many different providers of distance learning (both in the public and private sectors) and of the components of distance learning such as content, student support services and infrastructure. Specialist distance education institutions exist in Australia, UK and Malaysia. In Kenya and Jordan, supply tends to be drawn from outside the country, while Malaysia has a strong local supply and the UK and Australia are major exporters. Individual governments and international aid agencies are seeking to build ICT capacity both at the technological and human levels. Regional provision is developing in Kenya and Jordan with overseas assistance and Malaysia is seeking to be both a strong local and regional provider in its region. Leading institutions in the UK and Australia are involved in international consortia for the development and delivery of distance learning provision across countries.

Quality review arrangements

1.6 There is considerable variety in the regulatory and quality review arrangements of the countries in our sample, as well as some similarities (where countries have learned from each other). While terminology may appear similar (for example: accreditation and recognition) it may in practice apply differently to different kinds of provider (private or public sector or overseas), different types of provision (distance learning or face-to-face) or at different levels of the system (institution, programme or educational service). In some countries (such as Kenya and Jordan) there are few actors and agencies involved in regulation and quality review arrangements, in other cases, there are many levels to the system, from federal to institutional level. Purposes, procedures, powers and consequences of quality review also vary across the countries.

1.7 The quality review of distance learning does not exist in some countries (either because of a traditional lack of distance learning or because of the development stage of quality review arrangements). In other cases, distance learning, (either local or transnational) is treated differently from face-to-face provision. In yet other cases (such as Australia) no distinctions are made in quality review procedures that relate to different forms of delivery and provision. However, it is important to note that distance learning for the most part does not mean pure 'electronically-delivered' learning since this kind of provision appears difficult to track or is 'invisible' within the national regulatory systems of many countries.

1.8 In addition, where distance learning is relatively new, cultural 'prejudices' may apply such that it is treated as second class and second best and qualifications gained by this route may not be recognised for certain types of employment. The growth of distance learning provision, particularly if accompanied by relevant quality review practices may be expected to change this picture over time.

Quality review arrangements and their relationship with trade in educational services

1.9 There is an increase in the volume of import and export of education in all our sample countries (and that is reflected world-wide). Although the flows are never totally one-way, our countries are split into net importers (Jordan, Kenya and Malaysia) and net exporters (UK and Australia). However, all aim to export education services and the importers are actively seeking to become regional 'hubs'. Malaysia hosts a wide variety of different forms of transnational provision and actively encourages overseas providers to deliver in-country both to build capacity and to reduce the outflow of dollars from the country associated with students studying overseas. Malaysia also has five branch campuses of its own in other countries.

1.10 National governments differ in their approach to the import and export of educational services and in their positions on GATS (if they have one). Australia, UK and Malaysia actively encourage or promote and support transnational education and are putting in place or developing further their regulatory and quality review arrangements in this international and increasingly commercial and competitive context. Jordan and Kenya are seeking to build capacity both in educational provision and in quality review and there are still many inconsistencies and omissions in current arrangements. This may either limit the types of provision available or enable provision to be delivered without controls. These importers also tend to rely on the review arrangements of exporters to ensure the quality and standard of imported provision.

Policy issues and implications

1.11 There are a number of policy implications that arise from this study and these are presented as a basis for discussion among members of the International Commission.

- An understanding of the historical and the current context of each country is important both for researchers and for countries that are seeking to export provision. Institutions, quality agencies, and relevant government departments need to be well-informed about the specific socio-economic and cultural environment in which they (or their members) are seeking to operate and to recruit students. It is desirable for further country-specific studies to be undertaken to assist in mutual understanding and the collection of comparative data and information.

- International agencies such as OECD and UNESCO need to give attention to the issues of data gathering and comparisons across countries since existing data categories and terminology are increasingly problematic in the context of 'borderless education'. In addition, due to the rapidly changing nature of higher education, it is becoming increasingly important to ensure that data is as up-to-date as possible so that valid conclusions and comparisons can be made.

- In response to demand, the supply of higher education is increasing and becoming more complex in form and substance. There is great variety in the forms of provision and types of providers and in combinations of both. Competition and collaboration exist side by side in many regions. Monitoring and regulating quality and standards in this context is in consequence also becoming a more extensive, complex and expensive business. Smaller and developing countries need assistance with capacity building either at a local or regional level. Those with more mature quality review arrangements will also need to build capacity to monitor transnational and distance learning provision and may wish to consider collaborative international arrangements.

- There appears to be a gap in the quality review of wholly electronically-delivered provision within our sample countries and across countries. Such provision appears to be outside many regulatory frameworks and quality review (if supplied at all externally) appears to be provided by private sector external agencies. This may be appropriate, but discussion across agencies and countries should at least address this issue.

- There are many differences in the arrangements for quality review across countries in relation to, for example, public and private provision, distance learning and face-to-face provision, and vocational education and training and academic provision. It may be useful to seek convergence across these different categories (since the provision itself is converging and the boundaries of provider and provision are blurring). There may also be quality enhancement benefits and (in some cases) economies of scale to be achieved. However, where there are clear differences in the nature of provision (as with electronically delivered learning) accreditation and review procedures also need to be adjusted.

- We have noted inconsistencies and omissions within the regulatory frameworks of importing and exporting nations. There is a need to address these issues at an international level as it may be more economic and also more valuable to address the key issues collectively while allowing for necessary differences in each country or region.

- We have not been able to gather precise and detailed data on the impact of quality review practices on the import and export of distance learning. If the issues of terminology described above can be overcome, then such data needs to be collected through in-country studies and over a period of time to establish a base-line and identify trends.

International Quality Review and Distance Learning: Lessons from Five Countries

Section A: Introduction and Background to the Research Project

1. The Council for Higher Education Accreditation in the United States (CHEA) established an International Commission (IC) in September 2001. The Commission functions as a deliberating, co-ordination and communication body to address quality review issues affecting students, institutions and quality assurance and accreditation organisations internationally.

2. This is one of three projects intended to provide information that will enable the Commission's main audiences and stakeholders to manage and understand the key factors influencing international quality assurance.

3. The three projects have involved:

   i) Mapping of Current Information on International Quality Review: Organisations, Good Practices, Vocabulary
   ii) Assessing the extent and impact of Quality in Distance Learning
   iii) A forum for Developing Countries and Consideration of International Principles for Higher Education and the Public Good.

Section B: Terms of Reference

4. This project addresses the second theme described above and is focused on Quality Review arrangements for Distance Learning. CHEA identified two broad research questions for the study to address and for which they required baseline research information:

   - Are the quality review practices for distance learning the same or different for teaching and learning in different countries?
   - What is the impact of assuring quality in distance learning on the current import and export of higher education?

5. As guidance for the project, the International Commission also identified the following categories of distance learning:

   - Country A exports to Country B: may be distance-based or a combination of distance and face-to-face education;
   - Country A exports to Country B: distance learning is delivered through means that preclude any face-to-face or site-based function;
   - Regional Networks: distance learning that originates in one country but is intended to serve a number of countries at the same time.

Issues arising from the terms of reference

6. As CHEA and the International Commission recognise, the context in which higher education programmes are created and delivered is changing. These changes raise several important issues for this project.

What is higher education?

7. Definitions of what counts as 'higher education' (HE) are no longer straightforward. As noted in recent reports on 'Borderless Education' (CVCP, 2000; DETYA, 2000) many of the categories traditionally used to describe higher education providers and provision are becoming increasingly blurred as new providers, collaborative arrangements, new forms of learning and different levels of provision emerge. In addition, although there are international classifications of higher education (such as the ICSED classification), different definitions also exist across countries.

Who provides higher education?

8. A range of different providers is now involved in higher education, both within and across countries. These providers include some or all of the following:

   - Recognised 'traditional' universities and colleges, either singly or in consortia (including both not-for-profit state or private institutions);
   - Recognised 'traditional' distance education institutions;
   - Recognised higher education institutions in partnership with businesses, with further and vocational education providers and with corporations;
   - Accredited and non-accredited private, for-profit education providers;
   - Publishing and media businesses in partnership with universities and colleges;
   - Broker organisations working on behalf of one or more institutions;
   - Disaggregated provision, where several providers are involved in different parts of the educational process (e.g., curriculum design, learning support, delivery of teaching).

9. Internationalisation and globalisation trends are leading to a growth both of trans-national HE and of distance learning (OECD, 2003). Countries (or states, provinces, territories and regions within countries) may have different arrangements for recognising, accrediting or licensing different forms of provider and types of provision as well as different arrangements for indigenous and international providers. These arrangements are reflected in legislation and in the responsibilities of different agencies. Quality review practices may therefore differ at the level of provider and provision rather than at the level of the country alone.

What is distance learning?

10. Just as forms of higher education are becoming increasingly diversified, so distance learning is diversifying. At the outset, therefore, this project has needed to give attention to categories of 'distance learning', particularly as some forms of 'distance learning' are becoming integral to face-to-face programs.

11. Also, while the sponsors of this project (the IC) clearly have an interest in the international dimensions of the project, we must not forget that there is much distance learning that is nationally and regionally rather than globally focused. Quality assurance approaches can also differ along the national/trans-national dimension; for example, international provision may be more regulated than local (public) provision.

12. The terms 'import' and 'export' are often implicitly or explicitly linked to trade in education. In practice, distance learning may be a tradable commodity between countries (where one institution/country is deriving income from the sale of education to another country/institution). However, it may also be part of a partnership (for example in some twinning arrangements) where the exchange is reciprocal or involves benefits other than income. In addition, distance learning that is designed and 'exported' from one country may not be intended as an import for the citizens of another country. Instead, the recipients may be ex-patriots of the country of origin or 'international' students of other kinds.

How do countries ensure quality in distance learning?

13. Countries differ in the ways in which they seek to assure quality. The particular arrangements for each country will usually be set out in a legislative and regulatory framework. Quality review processes are more or less elaborate in different countries and in some countries are only in the first stages of development. Distance learning as a medium may or may not be treated differently from other approaches to the delivery of HE and in some cases may not be regulated at all.

14. In addition to these general points, changes in the technology of distance learning and changes relating to the growth in both distance learning and trans-national education tend to affect the overall picture. ICT infrastructure, home usage of the Internet and skills in the use of ICT vary from country to country and between regions.

15. We also need to take note of the status of distance learning, both formally and informally, in different countries. For example, in some countries, qualifications achieved by distance learning mode are not recognised as being of the same status as qualifications obtained through other study modes. Graduates

obtaining such qualifications may be barred from certain kinds of public service employment. This may be the case despite such provision being quality reviewed in its country of origin. Such an issue has a bearing on the scope of quality review arrangements and their role in 'protecting students'.

Quality assurance arrangements and their impact on the import and export of HE

16. Without detailed baseline research into the higher education system of each country, it is difficult to assess 'impact'. For example, the following questions and issues arise:

- Where quality is assured by relevant parties (e.g., institutions themselves and/or external agencies), is the impact positive in relation to the recognition of distance learning programs by importing countries, the take-up of programs by students and the acceptance of qualifications by employers?
- Where quality is not assured by formally recognised mechanisms, is the impact negative (e.g., the legislative context does not offer parity of esteem to distance learning modes, or take-up by students of distance learning options is limited)?
- Are the quality review processes used (or the agencies used) perceived to have a positive, negative or neutral impact on the import or export of distance learning?
- Are some exporting countries more 'acceptable' than others to importing countries because of the nature of their quality review practices?
- Are the regulatory and quality review requirements of importing countries a benefit or hindrance to the export of distance learning?
- Do quality assurance arrangements make a difference to the acceptability of distance learning, or is public confidence affected by other issues (such as the novelty and 'difference' of distance learning as a medium of instruction)?

17. These questions have been addressed in the study where possible, but it was not feasible to acquire detailed answers without recourse to in-country primary research. Such research was beyond the financial and temporal scope of this study.

Section C: Methodology

Sample

18. It was also beyond the scope of this project to examine every country world-wide. To achieve an understanding of quality assurance in distance learning at an international level, it was decided to focus on a sample of five countries where quality review practices for distance learning in higher/tertiary education could be accessed in the English language. The countries below represent a mix of developing and industrialised countries in different parts of the world and are countries that are known to import and/or export distance learning, and/or make use of distance learning at national and regional levels. The countries are:

a) Australia
b) Jordan
c) Kenya
d) Malaysia
e) UK

Research questions

19. We have expanded CHEA's broad questions into the following research questions:

- What is the nature of the institutional and regulatory approaches that seek to safeguard the quality of distance learning in a range of countries?
- How does quality assurance policy and regulation for distance learning differ within countries (e.g., by type of provider, type of provision)?
- How do the institutional and regulatory approaches differ between countries, if at all?
- What is the impact of quality assurance policy and practice on the extent and nature of the import and export of distance learning in these countries (for example, on student numbers, fees, perceptions of providers, and access to employment)?

Literature review

20. The project began by collecting and undertaking an initial review of the international and national literature on quality assurance for distance learning. This helped to set the context for the project, highlighted the key issues, and provided insight into the similarities and differences between national approaches for recognising and safeguarding quality.

21. The project as a whole aimed to build on previous research and has been desk-based, drawing on documentation available on the web, in hard copy from relevant sources, and on the wider literature.

Documentary analysis

22. The second stage of the project has involved an analysis of the formal documentation of government, quality agencies, NGOs and national organisations concerned with distance learning. In practice, this stage overlapped with the literature review as we found we needed to collect country-specific data early in the life of the project. The documentary analysis identified, reviewed, summarised and compared the following information across the sample countries:

- The terminology used relating to distance learning and quality assurance
- The legal framework for tertiary education, particularly as it relates to distance learning;
- The kinds of providers that are recognised (or not) by state mechanisms;
- The quality review agencies or arrangements that are in place in each country (and where reported gaps exist);
- The review arrangements for different types of providers or provision;
- The documentation used by recognised state (or relevant private) agencies for the review of quality in distance learning provision;
- Particular concerns expressed or issues raised about quality issues in distance learning by relevant parties in importing and exporting countries.

Verification of the data

23. The third stage of the project, after creating case-studies for each of the sample countries, was to verify the data with in-country experts. These individuals included Ministry officials, representatives of international organisations, quality assurance agencies and higher education experts. Following verification of the cases, an analysis of the research questions was undertaken across countries to present a summary report of the main findings (see Part Two).

Section D: Findings

The findings are set out in two parts. The first part is concerned with the wider literature, both the academic literature and documentary evidence drawn from official sources and web-sites. The second part focuses on the specific findings from the country-case studies.

Part One: Findings from the wider literature

1. In Part One, the findings are set out under the following headings:

- Context and Terminology
- Quality review of distance learning: types of approach
- Quality review of distance learning: agencies involved
- Quality review of distance learning: review processes
- Challenges and issues in the quality review of distance learning (particularly e-learning).

A. Context and Terminology

2. Our research intersects with four major domains: Higher Education; Distance Learning; Quality Assurance; and Trade in Educational Services. In all these domains, the issue of terminology intrudes since there are few internationally agreed definitions and even where these do exist current changes are likely to challenge their validity. In this section we draw attention to the range of terms in use and the issues raised by changes in each domain. Where relevant and appropriate, we also offer general definitions that have guided the research. We also highlight country-specific interpretations of the terms.

Higher education

3. A secure definition of 'higher education' has not been found. Terms that are used both as synonyms and with specific meanings in different contexts include: tertiary education, post-secondary education and universities. Different countries mean different things by the term and within these meanings there are different understandings of: timing (e.g., post-18), level (e.g., third stage or foundation), type of learning (education or training, academic or vocational), field of study (e.g., in some countries, nursing is not higher education, in others it is), links to research, and the significance of the qualifications awarded (e.g., as a licence to practise or not). Higher education includes both programmes of study leading to awards from recognised universities and colleges, and a narrower definition as simply the award of a degree or diploma (for example: the London University External Programme is an examination system that leads to a degree). Increasingly, higher education includes education provided at recognised universities and colleges that does not lead to a degree, as well as education offered by other kinds of provider that leads to diplomas, degrees and other kinds of award.

4. In some countries, higher education is divided into different types of education, each offered by specially designated institutions. Examples here would include community colleges, tecnikons, specialist colleges and universities. In some countries, a key aspect of the university is training for or conducting research, in other countries (e.g., in continental Europe) research is often conducted in research institutes rather than universities. Higher education institutions may operate independently or be linked – perhaps in a formal system as in the US – or in a looser association of institutions linked by agreed progression routes (as in the UK). In other countries, there is no clear institutional boundary between different types of higher education (Australia and the UK, for example, have abolished their 'binary line'). And in other countries, boundaries exist at the programme and degree level, rather than between institutions (for example, in the reforms emerging in the Netherlands).

5. Some official definitions include:

- OECD (1998) definition (from Wagner). This relates to tertiary education:

"Tertiary education is a key part of lifelong learning and a cornerstone of today's knowledge society. It is also a broader notion than it used to be, incorporating most forms and levels of education beyond secondary schooling, and including both conventional university and non-university types of institutions and programmes. Tertiary education also means new kinds of institutions, work-based settings, distance learning and other arrangements. Unlike conventional definitions used by OECD before (OECD, 1974; OECD, 1987) tertiary education now puts its focus as much on demand as it does on supply. In other words, it is more student-led than it was in the past, and that has new implications for stakeholders, institutions and resource planning."

- UNESCO definition taken from General Conference at its 27th session (1993):
  "Higher education means all types of studies, training or training for research at the post-secondary level, provided by universities or other educational establishments that are approved as institutions of higher education by the competent State authorities."
- UNESCO definition taken from UNESCO Thesaurus
  "the stage following secondary education, regardless of course duration or certificate awarded".
  (Includes Postsecondary education, Tertiary education, Third stage education, and University education as synonyms)

- World Bank definition (from Berryman SE (2000)):
  "Higher education or tertiary education or post-secondary education: Education programmes offered to students who have successfully completed prerequisite studies at the upper secondary level. There is usually opportunity for post-secondary technical as well as university training. Program completion is marked by the awarding of a university degree or a recognised equivalent qualification".
- The UNESCO General Conference adopted the International Standard Classification of Education (ICSED-97) in 1997. ICSED-97 is also used by the OECD to help improve the comparability of in its educational indicators. ICSED-97 uses the term 'tertiary education' in its categories 5A, 5B and 6. Level 5 refers to 'first stage' tertiary education, and Level 6 to advanced research. ISCED 5 programmes have an educational content more advanced than those offered at levels 3 (upper secondary) and 4 (post-secondary non-tertiary). ISCED 5A programmes are largely theoretically based and are intended to provide sufficient qualifications for gaining entry into advanced research programmes and professions with high skills requirements. ISCED 5B programmes are generally more practical/technical/occupationally specific than ISCED 5A programmes (OECD, 1999).

6. Recent changes in higher education are broadening our definitions of higher education in several ways. First, new institutional forms are developing, including consortia of institutions, national or individual virtual institutions and hybrid institutions with not-for-profit and for-profit elements. The educational process is also being 'disaggregated' (a feature that is already commonplace in distance education) in ways that enable different providers to deliver different parts of the process (e.g., curriculum design, delivery of teaching, support for learning, assessing and awarding). Delivery of the different functions may take place in different countries, as in the case of Cardean University, or Apollo International's operations in India.

7. Second, providers of higher education are becoming more varied to include companies and businesses as well as traditional institutions. Third, types of provision and qualifications are also widening. These new types may include research, taught and experiential elements, delivery through a range of media and final qualifications that may be multiple awards (e.g., an IT degree with CISCO accreditation or a 4-university joint degree) or awards of different types (e.g., a foundation degree, professional Doctorate). These changes are an important part of the context for this project.

Distance learning and distance education

8. As John Daniel, Assistant Secretary General for Education at UNESCO has said, "distance education has evolved as a function of time, place and technology, so it now means different things in different countries". (1996, p47)

9. The three functions identified by Daniel can be expanded to highlight some of the differences between countries and to alert us to particular aspects of terminology that are relevant to distance education and to distance learning. Distance education often refers to formal programmes delivered by recognised 'higher education' establishments, while distance learning (and open learning) incorporates training contexts, work-based contexts and self-directed learning as well as formal, award-based education.

   Time: This involves the issue of synchronous (at the same time) or asynchronous (at different times) communication patterns between teacher and student, student and student or learning material and students. In the US, distance learning is often understood as the linking of students in remote classrooms by simultaneous video-conference (synchronous communication). In other countries, distance learning refers to people studying at home using a variety of asynchronous media. For example, in South Africa, distance learning is taken to mean educational programmes that provide interactive study materials, and decentralised learning facilities that students can access according to need, (i.e., asynchronously). (National Commission on Higher Education (1996) quoted in Daniel, op cit.).

   Place: Traditionally, distance education implied studying in a different location – away from - a formally recognised educational establishment, perhaps at home or at a study centre. This is reflected in the terminology often used in Australia and New Zealand, i.e., 'external', 'extramural' or 'off-campus study'. Locations that are now counted as 'at a distance from a formally recognised educational establishment' vary widely, from formally accredited learning centres and homes to offices, public libraries, museums, shopping centres and recreational spaces. In addition, distance learning can also include learning that

takes place within formal educational institutions but which is separated either by time or technology from face-to-face interactions between teachers and students or students and students. In some countries, the notion of 'distance' does not refer to the medium of instruction, but to the geographical distance from the university that is providing the degree qualification; it is thus barely distinguishable from 'franchising'.

Technology: The technology of distance education has evolved over time. Very early developments included the travelling lecturer, supplemented later by developments in printing and postal services. Between the 1960s and 1990s developments in telecommunications and broadcasting brought further changes. The former enabled remote classrooms to be linked by means of audio teleconferencing and then satellite transmission of video signals. These technologies are used now in many parts of the world including China and India. Developments in broadcasting produced enrichment in correspondence education by enabling the integration of other media. The UK's Open University was the first to exploit these developments, but once again, they are widely used in other parts of the world. In some countries, the medium of instruction and learning is reflected in the terminology: in France, distance learning is called 'tele-enseignement'. Another term that reflects the medium of delivery is 'web-supported' learning.

10. In the 1980s and 1990s, developments in personal media (such as audio-cassettes, personal computers, VCRs and more recently, mobile phones) increased the potential for self-directed study and for flexibility in learning. Simultaneously, improvements in telecommunications (telephones, faxes, audio and video-conferencing, the Internet) improved the speed, quantity and quality of interactions between learners and teachers. These developments also had the effect of making distance education more attractive to campus-based institutions so that the number of institutions offering distance learning increased (Jenkins, 1995 in a study for the OECD).

11. The technological developments that are now occurring involve the convergence of telecommunications, television and computing to produce a rich and varied environment for distance learning. These technologies offer a dynamic means of accessing, sharing and creating knowledge (Daniel, op cit.). They are thus having an impact on existing definitions of distance education by blurring the two traditions of remote-classroom and correspondence education as well as the boundaries between distance and on-campus learning. Convergence is happening both at the institutional and programme level such that 'dual mode' or 'mixed mode' provision is becoming commonplace (Tait and Mills, 1999). Perhaps because of some of these more recent developments, the term 'distance learning' is often used interchangeably with 'open' or 'flexible learning'. The convergence of face-to-face and distance learning modes is also reflected in the term 'distributed learning' which is gaining currency in tertiary education (and may be used as a synonym for distance learning) and the term 'blended learning' which is widely used in the training field.

12. In the longer term, developments in information and communications technologies may have more profound implications for our existing concepts and terminology. For example, distinctions between the creation and acquisition of knowledge are being eroded, as are distinctions between teachers and learners. As discussed above, new forms of higher education are also emerging. These developments will also have an impact on definitions of quality (see below), both in terms of our understandings of 'the student experience' and student learning and the appropriate nature and levels of attainment for particular awards.

13. In summary, distance learning is a broad concept involving a number of different approaches that reflect both historic traditions in different countries and different mixes of the dimensions of time, place and technology. Common characteristics of distance learning include:

- A separation between teacher and learner (in time, place or both)
- Accreditation or certification by a learning institution or external body (although this is not always the case)
- Use of varied media for course delivery (printed materials, radio, TV, video, computer-based learning and telecommunications)
- Communication mechanisms (between teacher and learners and learners and learners)
- Optional personal meetings (tutorials, practical sessions)
- Use of industrialised processes (for large-scale operations).

14. Within this project for CHEA, we have been primarily interested in distance learning that includes the use of electronic media. However, we should remember that providers in developing countries provide materials in whatever form they can access due to infrastructure constraints or because of skills' shortages

in the use of ICT. They may also restrict use of electronic or 'correspondence-type' distance learning because of cultural preferences for face-to-face contact.

15. Two definitions of distance learning drawn from the US are helpful:

- Distance Learning (DL) is an instructional delivery system that connects learners with educational resources. DL provides educational access to learners not [necessarily] enrolled in educational institutions and can augment the learning opportunities of current students. The implementation of DL is a process that uses available resources and will evolve to incorporate emerging technologies. (California Distance Learning Project, 1997; available on-line at: http://www.cdlponline.org/dlinfo/cdlp1/distance/Introduction.htm)
- The acquisition of knowledge and skills through mediated information and instruction, encompassing all technologies and other forms of learning at a distance. (The USDLA notes that distance education refers to teaching and learning situations in which the instructor and the learner or learners are geographically separated and therefore rely on electronic devices and print materials for instructional delivery. Distance education includes distance teaching – the instructor's role in the process; and distance learning – the student's role in the process. (United States Distance Learning Association, 1999)

16. Using these definitions as a guide, we have focused on approaches to distance learning that apply at a national level (where there are differences from quality assurance approaches linked to other forms of education) and approaches that apply to distance learning that crosses national borders (regionally and globally).

Quality Assurance and Regulatory Frameworks

17. Quality assurance and accreditation arrangements in different countries need to be understood in the wider context of each country's legislative and regulatory framework. In conceptual terms, approaches to quality assurance are part of a hierarchy of mechanisms used by the state (or states, provinces or territories) both to grant powers to institutions and agencies and to exercise control (or seek accountability) for the ways in which these powers are used to deliver particular services. Different arrangements across countries are linked to particular 'quality policies'; these represent differing levels of devolution of authority from the state (or states, provinces and territories) to agencies and institutions and different histories of voluntarism and compliance to state expectations or requirements. In most countries, quality assurance arrangements have evolved (and are evolving) through different stages.

Legal and regulatory frameworks: national and international levels.

18. At the top of the hierarchy, statutes and laws provide a general direction for quality assurance, for example in terms of legislation on human rights, discrimination, employment practices or health and safety. Legislation will also, in most countries and states, set out the formal powers of institutions and the regulatory framework that will guide their governance and operations. Charters are another formal mechanism through which these powers can be granted. Academic freedom and institutional autonomy as well as the awarding of degrees are often key aspects of legislation (and charters) in many countries. The legal framework will also establish the role and powers of those agencies charged with monitoring the exercise of institutions' powers (such as accreditation or quality assurance agencies). The awarding of degrees and diplomas, the use of public funds and increasingly, consumer protection and information, are central concerns in most regulatory frameworks. In many countries, the development of intellectual, economic and cultural capital is also formally addressed. The legal position and powers of institutions differ across countries, as do regulatory frameworks. These differences are discussed in more detail in the country-studies.

Recognition and approval: institution and agency levels.

19. There is considerable ambiguity in the terms: 'recognition', 'approval', 'licensing', 'registration' and 'accreditation' across countries. Formal 'recognition' is usually linked both to charters and statutes and to particular regulatory mechanisms such as 'accreditation' or to other processes associated with the granting of 'degree-awarding powers'. In the UK, for example, such processes lead to becoming a formally 'recognised' or 'listed body' on a list maintained by the relevant government department (the Department for Education and Skills). The regulatory framework may also provide formal 'approval' of those agencies

charged with monitoring the framework and delivering its regulatory processes. It is clearly important in each country to know the official sources of 'recognition' and 'approval' and their practical manifestation in authoritative lists, databases and agencies.

20. Recognition and approval status may apply separately to national and non-national institutions, to institutions of different types (for example public, private and for-profit) and may also, in some countries, be used in relation to modes of instruction such as distance learning. It may also apply to the awarding of degrees or to the offering of programmes of study.

21. Other terms that are used – and either confused with or used synonymously with recognition and approval – include 'licensing' or 'registration'. These terms can refer to permission for an institution to operate as a business in a city or country and need not imply approval of the quality of degrees. In other cases, licensing is a pre-requisite for accreditation, and is the authority for degree-granting status, but standards and criteria may vary (as is the case in different states in the US). 'Licensing' may also be used at degree-level as an outcome of the qualification that grants the graduate a 'license to practice', as in the field of nursing or midwifery (although arrangements again differ across and within countries).

22. In the international context, another form of 'recognition' is particularly important: the recognition of qualifications earned in one country for use (for academic, professional or employment purposes) in another country. In some countries, there are national centres that provide advice or have the power to decide on the comparability of qualifications. Within the European Union, all countries have National Academic Recognition Centres (NARICs) although the status and competence of the centres varies across member states with some having legal competence to make decisions and others having an advisory capacity only. A wider network, the European National Information Centres (ENICs), operates under the auspices of the Council of Europe and the UNESCO-CEPES Europe region.

Accreditation: institution and professional levels

23. Accreditation can apply at institutional, programme or degree level. It is typically a formal process of enquiry against a set of agreed criteria (or standards). However, in many countries, it is possible to award degrees without accreditation (e.g., through the granting of licenses) while elsewhere, as in many parts of Central and Eastern Europe, public institutions may not even offer a programme unless it has been accredited. The process of enquiry is undertaken by a formally constituted body and will lead, if successful, to a formal status (as an accredited institution or accredited programme or degree). There may be different stages en route to full accreditation, for example, provisional or candidate and the process may be voluntary or compulsory with a fee charged for the process. Accreditation has a long history at institution level and specialised programme level in the US and at professional programme/degree level in other countries. In the light of changes in higher education caused by ICT developments, regionalisation agendas and wider globalisation pressures, the concept of accreditation is gaining ground. Recent converts exist in continental Europe and in South Africa where a new accreditation process has been launched for private and for-profit providers. The outcomes of accreditation differ and include permission to run a programme, access to funding for institutions, programmes or students and a license for graduates to practise as a professional.

24. Complications can arise for distance learning providers or programmes when accreditation procedures designed for face-to-face programmes are used to judge electronic delivery. Residence qualifications, books in the library or numbers of PhDs on the staff may not be significant criteria, for example, for the quality assurance of electronically delivered transnational programmes.

Validation: agency, programme/degree, or institution level

25. Validation has much in common with programme accreditation. Typically, it describes an approval or authorisation process at programme level. For example, universities in the UK validate their own degrees (i.e., approve the curriculum design and content, learning resources and assessment methods).A confusion is that in Australia, the term 'self-accrediting' is used instead of 'validation'. In many professional areas such as engineering, law or medicine, validation and accreditation go hand-in-hand at the programme level to ensure appropriate academic and professional standards.

26. In addition to universities, authorised validating agencies may exist to approve particular types of programmes and awards. The UK's Open University operates a Validation Service (OUVS) that validates programmes from a variety of providers. Provision often incorporates elements of distance learning and transnational arrangements. A further complication is that the power to validate degrees may also include the power to authorise others to teach all or parts of the programme leading to the award. This 'authorisation' leads to arrangements such as articulation, twinning or franchising where the educational process is shared between providers in different countries or is delegated to another institution (while the awarding function is typically retained by the home institution).

Quality assurance policies and arrangements: national, institutional and programme levels.

27. The term 'quality assurance' may refer to all the arrangements made at any of several levels (national, international, supranational, regional) to assure the reliability and quality of institutions, consortia, other providers, programmes, qualifications and other services. Thus recognition, accreditation and validation may be parts of a national, regional, or state-level quality assurance system. Arrangements may also be linked to geographical origin of provision: regional, national or international. The term may also refer more narrowly to the monitoring and review of institutional activity from an internal or external perspective (or both) and to refer to similar arrangements at the level of disciplines, programmes and awards.

28. Institutions will (usually) have their own internal quality assurance systems; professional bodies may monitor institutions' programmes through an external review process and governments may also prescribe an external quality assurance process to review institutions, programmes, disciplines or wider educational activities. In other cases, an external quality assurance process follows accreditation (i.e., the latter provides initial approval, while the former offers a regular review mechanism). In several countries, the arrangements are different depending on the ownership, governance or economic status of institutions (i.e., public, private, for-profit or not-for profit).

29. A 'quality assurance system' may include:

- Definitions and criteria that explain the scope and 'confidence levels' that the system is designed to achieve in relation to academic quality and standards. These two terms are often used interchangeably, but this may blur or obscure important distinctions. 'Academic quality' typically refers to the educational process, learning experience and resources for learning; 'academic standards' refer to outcomes such as student achievements and capabilities that are reflected in the qualifications awarded.
- A range of external reference points such as qualification frameworks and level descriptors, quality standards, benchmarks, codes of practice and guidelines. These reference points are designed to provide greater clarity and transparency about the meaning of 'academic quality' and 'academic standards' and to act as a basis for judgements. They are also potentially important components in developing mutual understandings, interpretations and comparisons across countries.
- Review mechanisms such as self-assessment frameworks and review visits (assessments, audits or inspections). Different countries are increasingly using similar mechanisms, but it is still dangerous to assume that such mechanisms imply or ensure common understandings of quality and standards across countries.
- Outputs from the system may include reports, gradings, published statistics, performance indicators, league tables and kite-marks and may lead to different outcomes (e.g., access to funding).
- Independent or integrated arrangements to promote and support quality improvement. These arrangements may produce best practice guidance, or develop support networks for practitioners and other interested parties. An example of the latter is the International Council for Open and Distance Education, officially recognised by the United Nations as the global non-governmental organisation responsible for the field of open and distance learning.

30. Despite having achieved either accredited status or being formally 'quality assured' in one country, qualifications may not be recognised by employers, professional bodies or other academic institutions in another country. There are particular concerns about the validity of distance learning providers (a consumer protection issue), some accrediting agencies linked to distance learning (false claims of accreditation), fraudulent degree certificates, and plagiarism by students.

31. The countries in our sample are at different stages of development in relation to QA systems in general and arrangements for distance learning in particular. Countries such as the US, UK and Australia are influencing the developing quality assurance systems in other countries. In the future, there may be significant convergence between systems as the pressure for 'international read-across' gains ground.

B. Trade in educational services

32. The import and export of higher education from one country or region to another is not new. What is changing is the volume of importing and exporting activity that now exists around the world and the types of 'trade' involved, both official and unofficial, linked to profit-making and non-profit educational activities. The increasing volume of activity is fuelled in the main by three things. First, there is the driver of different balances in the demand and supply of education in different parts of the world. Second, there is the power and promise of technologies (both traditional and new) to deliver education in flexible and accessible ways to existing and new groups of students and third, there is the potential for trade in educational services to generate income for institutions, businesses and countries.

33. Since the World Trade Organisation decided in 1995 to include education within the scope of its General Agreement on Trade in Services, importing and exporting issues have entered a new arena. Leaving aside the political impact of these developments, the GATS has provided us with some definitions which can be applied in relation to the import, export and 'exchange' of higher education, including distance learning across national borders.

The 'modes of supply' within GATS are:

- **Cross-border supply:** where the service and not the individual cross a border (e.g., education and training offered via distance learning)
- **Consumption abroad:** where the individual travels across Member country borders to consume the service (e.g., individual students studying abroad)
- **Commercial presence:** where a service supplier (institution or other provider) establishes a physical presence in a second country to provide services (e.g., franchise or twinning arrangements, off-shore campus)
- **Presence of natural persons:** where an individual from one Member country supplies a service in another Member country (e.g., faculty exchange or visiting lecturers).

34. While these definitions of modes of supply are useful, the five sub-categories of education services used within the GATS framework are more problematic (i.e., primary, secondary, higher, adult and other). We are not concerned in this project with primary or secondary education, but for the reasons discussed earlier, definitions of higher education are widening to include adult (lifelong learning) and other forms of education (such as continuing professional development). It is not in practice easy to distinguish between these three categories since much convergence is taking place. There are also specific problems related to transnational distance learning in that many types of provision do not fall neatly into just one category of the GATS terminology.

35. Distance learning might be expected to be less subject to 'constraints on trade' than other modes of supply in educational services. However, where regulations are the same, constraints may exist. These include:

- Visa requirements
- Limits on access to employment in host economies (for foreign nationals)
- Foreign exchange requirements
- Restrictions on foreign ownership
- Rules on corporate arrangements.

36. Some constraints that specifically affect distance learning include:

- Telecommunications laws
- Intellectual property rights.

37. Any of these issues may – in subtle or overt ways – affect the take-up of distance learning options by students, the scale and scope of provision exported and the acceptability of distance learning provision as a viable alternative to sometimes expensive or otherwise inaccessible face-to-face provision.

C. Quality Review of Distance Learning

Types of approach

38. In our search of the general literature and relevant documentation, we have noted a variety of approaches to the quality review of distance learning (whatever the type of learning media used). This range of approaches is subtly different across countries and differences appear to be related to a range of variables such as:

- development of the HE sector (linked also to the country's economic and technological development)
- the evolution of distance learning
- the visibility of distance learning
- conceptual and practical issues related to distance learning
- stages of development of quality review.

The first of these is dealt with in the country-specific data in Part Two, but it is worth elaborating briefly on the other four issues.

a) History of distance learning

For some countries, distance learning is relatively new as a mode of learning in higher education (e.g., in the Middle East). In these countries, and particularly where distance learning is associated with expanding access from an elite towards a mass system, it may be treated as separate and different from traditional, face-to-face, public education and potentially as 'second class and second best' (Stella & Gnanam, 2003).

In other countries, it is the technology of delivery that is new, rather than the mode of learning. In Australia, Canada and Scandinavia, for example, geographically dispersed communities have for many years created a requirement and demand for distance learning. In these countries, developments in ICT have increased the range of learning media available. In addition, as in the UK, for example, the development of learning 'at a distance' has provided flexibility (of time, place, format, level and mode of learning) to enable institutions to reach out to previously disadvantaged or disenfranchised groups of learners. In these cases, distance learning is just one of a range of educational approaches used. With the convergence of media described above, distance learning is becoming a complementary or integrated part of conventional approaches to learning as well as an alternative choice of learning mode.

There is evidence to suggest that quality review arrangements can reflect these historical issues since 'quality review' is a cultural artefact that is linked, typically, to national systems. However, with the spread of distance learning within and across countries and the sharing of knowledge and information about quality and quality assurance – as well as the linking of quality assurance to aid programmes – historical differences may well erode.

i) Visibility of distance learning

The issue of visibility is important in relation to the use of distance learning in transnational education. Distance learning may be 'invisible' to public authorities for a range of reasons. For example, there may be no provider presence in the destination country (i.e., delivery is direct to students). Alternatively, 'lack of visibility' may arise as an intended or unintended consequence of policy. This occurs in some countries in Central and Eastern Europe (such as Bulgaria) where provision operates outside the regulatory system and is not therefore subject to accreditation and quality review. Data is not collected on this provision since it lies outwith the relevant Higher Education Act. In effect, such provision is treated as 'non-existent' (rather than illegal) and is 'invisible' to the public authorities (Georgieva in Middlehurst and Woodfield, 2003).

ii) Conceptual issues

There is a range of philosophical and conceptual issues that relate to distance learning and that appear to have a 'knock-on' effect for the quality review of distance learning. In the literature related to distance learning these issues appear in the 'no significant difference' debate (Twigg 2001b). The arguments of the debate relate to whether or not distance learning is the same or different from learning 'face-to-face' in terms of its quality and the standards that apply. The debate is similar in relation to the quality assurance

of distance learning: should separate, different and new standards and quality assurance arrangements apply for different modes of learning (Twigg, 2001a; Marginson, 2003) or should broadly the same criteria and arrangements apply (Stella and Gnanam, 2003)? Issues of equity (for learners and their qualifications) come into play as well as issues of practicality.

iii) Practical issues

The quality review arrangements for distance learning may be the same or different from review processes for 'traditional' modes of learning for a range of practical reasons. Distance learning may be treated as broadly the same because of convergence between modes of learning (as in Australia) or because the country has not yet developed any special arrangements for the new mode of learning (Jordan). It may also be treated as different because of the special issues that arise from the mode of learning and medium of delivery. In addition, some distance learning courses require attendance at recognised centres or short periods of study in a country (e.g.. parts of the University of London External Programme). Some examining or professional institutions expect physical attendance for examinations, demonstration of practical applications and some face-to-face tuition.

iv) Stages of development of quality review

It is clear that different countries are at different stages of development in relation to their quality review processes (Middlehurst and Campbell, 2003). In some countries, such as Malaysia, the initial focus of government interest was on private institutions and only recently has the focus extended to public institutions; at present the relevant agencies and review processes remain separate. In other countries, such as the UK and Australia, changes to the higher education system (i.e., a shift from an elite to a mass system and the ending of the binary line between universities and polytechnics) introduced or altered external review processes. In other parts of the world, such as Central America with the Central American Accreditation Council (CSUCA), there is a regional approach to quality assurance by countries that share a common language. In Jamaica, there is only one agency in the region and the remit of the University Council of Jamaica only extends to the one country. So, although there has been a significant increase in the number of quality assurance agencies across the world (Lewis, 2003) there is not universal coverage across all countries. In addition, agencies often have a specific or narrow remit (e.g., to undertake institutional or programme accreditation). Where quality review is relatively new, the main focus may not yet have turned to distance learning as a special or different aspect of provision.

This picture is further complicated by the addition – and growth – of cross-border education (OECD, 2003). Countries and quality review agencies now have to grapple with the delivery of education from different countries and in a variety of forms into the home country ('the import' of higher education). Providers from overseas may be either private or public, but are often classed as private by the regulations of the importing country. Providers from overseas may also collaborate with local institutions (both public and private) and may offer distance learning and face-to-face provision or a combination. The variety of combinations of provider and provision – including consortia, virtual universities and corporate providers - has significantly increased the potential complexities that face governments, agencies and quality review processes (CVCP, 2000; ENQA, 2001). Current debates therefore focus on the responsibilities of importing countries, exporting countries, regional and international organisations and networks in relation to quality review.

Approaches to cross-border quality assurance and review

Lewis, in his paper for the OECD (op cit.) lists eight different approaches that are being adopted to address international (and cross-border) quality assurance:

- Unilateral action, where action is taken in one country in respect of activity that is being undertaken in a different country. Importing authorities may take action (as in the case of Hong Kong's Accreditation Council) or exporting countries may take action (as in the case of the UK QAA's overseas' audits).
- Multilateral activity, whereby people, institutions or agencies from different countries work together. An institutional example is Universitas 21 Global which has set up 'Universitas Pedagogica' to quality assure provision in its consortium of 16 universities from a range of countries. An agency example is the developing relationship between Malaysia's LAN and Australia's AUQA.

- Sharing of information across agencies as a basis initially for mutual understanding and in due course, perhaps, for mutual recognition of agencies. INQAAHE and CHEA web sites provide extensive information about quality review processes, relevant terminology and current challenges.
- The export of quality assurance, where a quality agency operates overseas in relation to education that does not emanate from its own country. The Global Alliance on Trans-national Education's (GATE) 'Principles for Trans-national Education' and 'Certification Programme' provide an example of the export quality assurance.
- Mutual recognition for the professions. This is long-established in Engineering through the Washington Accord initiated in 1989, and is expanding in the broad field of business education (with a proliferation of agencies involved). Other professions such as architecture and accountancy are also developing international arrangements.
- The accreditation of accreditors and the formulation of principles of good practice. CHEA, for example, is an umbrella organisation that accredits the regional and national accrediting agencies in the USA. Recently, the International Association of University Presidents (IAUP) proposed the establishment of a 'World Quality Register' that would include agencies that complied with specific criteria. This proposal has had a mixed response to date and may emerge in stages, beginning with the promulgation of 'Principles of Good Practice' such as those developed by INQAAHE members in 2003.
- The use of mutual recognition of qualifications as a vehicle for ensuring quality. The further development of UNESCO's regional conventions on the recognition of qualifications offers one such route. Other examples may be linked to regional trade agreements as in the case of the MERCOSUR agreement in South America. MERCOSUR is an agreement related to economic integration between Argentina, Brazil, Paraguay and Uruguay, including an association with Bolivia and Chile. The relevant Ministers of Education have signed an understanding on the implementation of an experimental mechanism for the accreditation of degree programmes and the recognition of degrees in three programme areas.
- The establishment of international quality assurance agencies (or associations) that are not focused on one country. Only in the field of distance learning and distance education do these exist at present, for example, the International Council for Open and Distance Education (ICDE).

Quality review of distance learning within and across countries

39. While Lewis has drawn attention to the range of approaches to quality review across countries, the specific approaches to the quality review of distance learning that we have noted fall into the following categories. They reflect the variables discussed above. For example:

- Distance learning, if visible, may not be recognised because it is 'learning at a distance' as opposed to face-to-face. This is the case in the Middle East and some Central and Eastern European countries where up till now there has been no indigenous distance learning provision or where it is a variant of correspondence courses and/or adult education (i.e., it is not classified as 'higher education').
- Distance learning, if it has no visible presence in another country (i.e., in the form of a branch campus, tutorial support or learning centre) is ignored for recognition, accreditation and quality assurance purposes (as in Hong Kong SAR or Israel) See http://www.hkcaa.edu.hk/, and http://www.che.org.il/eng.htm.
- Distance learning that is visible (i.e., there is a local presence) must be accredited or licensed. The United Arab Emirates, for example, has published new standards and criteria for accreditation that includes distance learning http://www.caa.ae/. Hong Kong SAR, if you are a provider with a physical presence on the island and have no Hong Kong partner, you must be on a register of non-local provision http://www.ugc.edu.hk/.
- Distance learning is subject to the same accreditation arrangements as other forms of learning (several US regional accrediting agencies, Jamaica and Malaysia), although standards and processes may have been modified to accommodate the new learning media.
- Distance learning is treated the same (in terms of principles and level of rigour in the review process) but its unique characteristics as a medium of delivery and mode of learning are recognised in the methods used for review. This is the position adopted by the NAAC in India (Stella and Gnanam, 2003) and the QAA in the UK in its proposed new guidelines for 'distributed learning' which will include elements of the existing separate guidelines for collaborative provision and distance learning (QAA, 1999).

- Distance learning is regarded as significantly different in terms of its mode of learning and delivery mechanisms, particularly in relation to aspects of 'borderless education' (e.g., where the educational process is 'disaggregated' across a range of providers and aspects of provision). In this case, specialist agencies and review processes have been developed to accommodate such differences (such as the BLA accreditation for learning materials and learning centres http://www.baol.co.uk/qmaccred.htm.

Quality Review of Distance Learning: Agencies and associations involved

40. There is a range of agencies and associations involved in the quality review of distance learning and these organisations vary in the scale and scope of their operations and in whether they are offering non-profit or for-profit services. Growth in both cross-border education and trade in education has led to a parallel rise in cross-border quality review as well as trade in quality review and accreditation services. The range of agencies and associations includes:

- Specialist agencies (with local and international reach, covering either particular sectors or all sectors). These include: DETC (US-based and accredits internationally), ICDE (Norway-based and accredits internationally) recognised by the United Nations as the global membership organisation in open, distance and e-learning), GATE (US-based and accredits transnational education in different countries through an institutional review process. Australian higher education institutions, for example, have sought accreditation from both the ICDE and GATE.
- Specialist networks and associations such as the Sloan Consortium in the US set up by a number of accredited institutions offering high quality online education. The Consortium has published 'Five Pillars' to support online quality and a series of 'effective practices' that together make up the Sloan Consortium Quality Framework; it is available through the Web (http://www.sloan-c.org)
- Professional bodies (operating locally and internationally).
- National agencies (focusing on their own country and including imported providers and provision from other countries) (e.g., Hong Kong Council for Academic Accreditation)
- National or state agencies (operating overseas in relation to their own national providers). For example, the QAA (UK), the AUQA (Australia), several US regionals.
- National or state agencies (operating overseas in relation to their own and other providers). Some US regionals.
- Regional agencies and associations, e.g., 8 regional accrediting agencies in the US, European Universities' Association Institutional Review Process, Central American Accreditation Council (based in Guatemala).
- International agencies and associations (e.g., International Standards Organisation (ISO)).

41. Apart from those agencies that directly undertake quality reviews or set standards, a number of other networks exist to support quality review (not exclusively in relation to distance learning). These include ENQA at regional level, and at a global level, INQAAHE and more recently the Global Forum on International Quality Assurance, Accreditation and the Recognition of Qualifications set up by UNESCO. Others have published various forms of relevant guidance (e.g., The US Institute for Higher Education Policy published 24 benchmarks in 7 areas, the American Council on Education published 'Guiding Principles on Distance Learning in a Learning Society' and CHEA has produced a variety of relevant publications).

42. The US arguably leads the way in its range of networks and associations for distance learning, the variety of quality review and improvement processes that exist and in the amount of distance learning that is reviewed. For example, CHEA reported that 5,655 institutions were accredited by the 17 institutional accreditors (national and regional) and that of these, 1,979 offered some form of distance learning programmes or courses (CHEA, 2002). However, we should not forget that other countries have sizeable distance learning provision. For example, in India, there are 10 open universities and around 62 distance education directorates in traditional universities, some of which have study centres overseas, while in Thailand and Turkey, the national open universities enrol respectively 41 and 38% of the total student population in the home country (World Bank, 2002).

Quality Review of Distance Learning: Review processes

43. There are a variety of processes that are used in the quality review of distance learning. The different processes need to be understood in relation to different parts of a system: inputs, processes, outputs and outcomes. The content of each part of the system may or may not be different to the quality review processes applied to other modes of learning (as discussed above). The main approaches are:

Inputs
Frames of reference, policies, principles, criteria, benchmarks, standards, codes of practice and guidelines for each component of the educational system under review (these components may be the same as for other forms of learning or specific to distance learning).

Processes
Accreditation (provider and programme levels), audit (providers, provision and services to the student), internal assessment, external assessment through review visits.

Outputs
Reports (public or not), performance indicators, descriptive information, comparative information and data.

Outcomes
A license to operate as a provider, access to funding (institutional or student funding), access to partners, recognition of qualifications for unlimited or limited purposes (e.g., licensed graduates for entry to professions, recognition of qualifications for entry to public service employment).

44. Quality review processes serve a variety of purposes including quality improvement and development, quality assurance, accountability for the education provided or use of public funds and provision of information to consumers, stakeholders and other interested parties. Quality review is also aimed at different audiences including institutions and providers themselves, governments, students and other clients such as employers, and the review and recognition agencies of other countries. The forms of review may differ according to both purpose and audience.

Challenges and issues in the quality review of distance learning

45. There are a number of sources of data and information about the challenges for quality review arising from distance learning (particularly in its newest forms of electronic delivery) and from the parallel phenomena of cross-border education, consortia arrangements, corporate and commercial provision. The accrediting agencies are a primary source of such information.

46. Judith Eaton, Chief Executive of CHEA in a paper published for ACE in 2002 states that a key aspect of the challenge of distance learning for US accreditation is that relevant values, policies and practices were created in relation to site-based education. Quality review processes in accreditation have therefore involved 'site-based tasks such as visiting campuses, examining classrooms, touring facilities, and, in general, scrutinising the resources and capacity of an academic community, especially the teaching and learning environment' (p5). Distance learning involves a different array of resources, is not necessarily site-based or involving any face-to-face contact and may include a variety of different educational environments. Eaton notes a number of specific challenges for accreditors and the accreditation process in reviewing new ICT-based forms of distance learning:

- Computer-mediated classrooms where faculty and students engage with each other electronically;
- Separation in time between communications;
- Availability of online services whereby students services such as advising, mentoring and library services are integrated with the online teaching and learning environment;
- Changes in faculty roles (by reducing face-to-face interactions and increasing written interactions, by separating curriculum design from delivery, by increasing standardised rather than individually-created materials and by shifting the determination of curriculum standards and outcomes to corporate providers);
- Extending the range of 'institution' and 'learning environment' to include online communities of practice or campuses and online chat rooms;

- Changing the meaning of a college degree since electronic access can enable students to be mobile, attending more than one institution either serially or simultaneously, online or onsite. A degree can thus represent a single and distinctive institutionally-based experience or a multi-faceted portfolio of educational experiences.

47. In another paper in the same year, CHEA noted that assuring quality in distance learning posed three major challenges for US accreditation (CHEA, 2002). The first challenge is similar to those above, i.e., the alternative design of instruction from traditional classroom-based learning environments. The second is the range of alternative providers of higher education that now seek accreditation including online consortia of institutions and corporate universities. The third challenge is an expanded focus on training. Distance learning is often a favoured mode of instruction for ongoing training in professional fields, so the question is whether accreditors should expand their attention from assuring the quality of longer-term and broader based degree programmes to include shorter more focused and skills' based programmes of study. There is also the question of whether agencies should converge since vocational education and training provision (and private higher education) is often covered by different Ministries, departments or agencies to those concerned with public higher education.

48. Other authors draw on experiences in different parts of the world. Stella and Gnanam (2003) comment from experience of the NAAC in India and highlight both general challenges and those that may be of particular significance for developing countries. Initially, these authors record some of the traditional concerns about quality in distance learning. These include lower standards of students enrolling, inadequacy of student support services, limitations caused by lack of face-to-face interaction between teachers and learners and the perception that distance learning is not on a par with traditional forms of education. They report that in recent years, considerable progress has been made in assuring the quality and effectiveness of distance learning, but that some key differences between traditional, face-to-face provision and distance learning need to be taken into account in quality review processes. They also record some unanswered questions for quality assurance.

49. The differences to which Stella and Gnanam (op cit.) draw attention are similar to those noted by Eaton. The faculty role is different, course management is different, library and learning resources may require increased electronic access and the medium of distance learning raises important questions about the essential nature and content of an effective educational experience and the resources required to ensure effectiveness. The authors ask specific questions that will resonate particularly with developing countries, but also more widely:

- What are the significant administrative issues affecting quality in distance learning?
- What is the notion of access and how do we define quality of access in distance education?
- What are the best ways of improving access, the quality of access and retention?
- How is a good learning experience defined and with reference to whom or what?
- Will the costs of technology involved be detrimental to access?

50. International conferences offer another source of information about the challenges of quality assuring distance learning (especially e-learning). In 2001, CHEA's second international seminar on Quality Review drew particular attention to cross-border distance learning, the impact of new competitors and the growing market in higher education, and the consequences of 'disaggregating' parts of the educational process so that they were dispersed across a range of providers. Particular questions that arose included:

- The potential for cultural imperialism in quality assurance;
- The difficulties of identifying cross-cultural indicators and substantive transnational indicators of quality;
- The need to capture good practice in the quality assurance arrangements for imported and exported education, including consumer protection and ethical practice;
- How did providers deal with low levels of literacy and limited study skills among students and how did they cope with differences across countries?
- How could the quality of virtual providers be assured?
- Was there a need to develop different standards for different types of programmes?
- How would the costs of quality assurance be met?

51. The recent CHEA Annual Conference (in 2003) drew attention both to progress being made in the quality review of distance learning and to remaining challenges. The latter included reliance on adjunct faculty

or faculty with multiple jobs, different admissions criteria for different students, the difficulties of course sharing across institutions, the outsourcing of key services and the growth of fake degrees and accreditation services. Progress was being made in several areas. This included stipulating standards that faculty must meet, providing training for on-line teaching and the management of student learning, developing course management and student record systems, establishing web design principles and technical standards, recognising achievements in online delivery and sharing information and good practice in networks and consortia within and across sectors.

52. In a specialist symposium on quality in distributed learning environments in 2000, a different issue was raised in relation to the traditional focus of quality review and the appropriateness of such a focus for the future (Twigg, 2001a). Echoing the debates highlighted above, Twigg points out that if distance learning is viewed as an alternative delivery system, then little change is needed in quality review as currently undertaken in the accreditation process. However, if – as many would argue – online and borderless education represent a fundamental shift in the nature of higher education, then significant modifications in quality review are necessary since most national and state systems focus on 'providers' (institutions and their programmes) and were created by professionals for professionals. Twigg describes a potential future in terms of 'a global learning infrastructure – a student-centric, virtual, global web of educational services' which encompasses 'a flourishing marketplace where millions of students interact with a vast array of individual and institutional suppliers delivered via the Internet' across institutional, state and national borders. In this scenario, the main focus of quality review, Twigg argues, should be on the consumer.

53. The symposium participants described the key concerns of the consumer as being about the level of conformity of the institution, programme or course to generally accepted practice, whether good practice was exemplified in relevant provision and how students as consumers could differentiate and choose between the multiplicity of offerings available. The symposium considered popular commercial web-sites as a potential analogy and source of tools for new customer-focused evaluations. These systems (Amazon.com, eBay and Zagat) offer pathways through their web-sites based on a statement of preferences (what a customer is seeking); they provide an opportunity for consumer and expert input about the preferences; and they provide a simple summary of consumer reviews (in the form of rankings). A 'student-focused review system' might contain some of these characteristics and adopt some of these tools. The symposium concluded by generating a series of questions that students might seek to ask about particular courses (rather than institutions or programmes), based on the original IHEP benchmarks. The Commonwealth of Learning has also developed a student-focused approach to the review of distance learning provision in the form of an evaluative series of questions that students can ask (COL, 1997).

54. Research monographs such as those published in the ASHE-ERIC series (Meyer, 2002; van Dusen, 2000) are a further source of information on challenges and progress in the quality review of distance learning, particularly e-learning. Meyer provides research evidence and a research agenda related to the quality of on-line learning in higher education while Cantor provides a helpful resource on distance education in the training and for-profit sector. In the current project we have not looked in detail at the commercial sector, but Cantor's work is a reminder that this sector may make technological advances in e-learning earlier than higher education and that it is a potential source of standards that can apply across sectors.

55. A recent Briefing Paper from the Observatory on Borderless Higher Education (2003) draws attention to some associations that undertake quality review processes in the commercial sector and have the potential to operate in higher education. Of these, the American Society for Training and Development offers 'e-learning courseware certification' through an affiliated body, the ASTD Certification Institute. The focus is on matters such as user interface, technical compatibility, production quality and instructional design. A second example is the British Learning Association (BLA) with its 'Quality Mark' approach. The focus is on four activities namely learning centres, advice and guidance, learner support and materials' development. The Quality Mark explicitly addresses the issue of 'disaggregation' in the educational process. The third example is the generic ISO range of standards. Several higher education institutions in a number of different countries including Australia, Canada, Thailand, Indonesia, Malaysia, Latvia and the UK (with the majority in Asia) have gained ISO 9001 certification for 'quality management of organisational activity to ensure customer satisfaction and regulatory compliance'. There have been recent discussions with the ISO body to consider the development of more tailored standards for all levels of education including e-learning.

56. Finally, policy reports such as those produced for the Observatory on Borderless Higher Education (e.g., Middlehurst and Campbell, 2003), the Commonwealth of Learning (e.g., Hawkridge, 2003) and the OECD offer insights into the challenges facing policy agencies at national and international levels. Middlehurst and Campbell draw attention to seven issues of continuing significance in relation to quality assurance for borderless education. These include the dynamic state of quality assurance at national, regional and international levels, the strengthening framework of quality assurance and review outcomes and broader concerns about fraud, deception and corruption in relation to providers, accreditors, consumers and provision. Hawkridge's paper is focused more specifically on open and distance learning and draws attention to issues of access, the regulation of foreign providers and the protection of national priorities and culture in an open market for services. The OECD's most recent work (undertaken through CERI) is not yet completed, but will involve a series of reports with substantive data on e-learning practice and provision, cross-border education and quality assurance practices in different regions, countries and institutions.

57. In Part Two, we turn to the specific findings from each of the case-study countries. We offer an analysis based around the main themes of the project, that is, the nature of distance learning in each country, the nature of quality review processes in general and as applied to distance learning, and the relationship between trade in educational services (from an importing and exporting perspective) and arrangements for quality review.

Part Two: Findings from the Case Studies

A. Introduction

1. The main message from the case studies is that 'context' is key to understanding the nature of distance learning and the form of quality assurance arrangements, the application of quality assurance to distance learning provision and the relationships between quality assurance and the import and export of higher education.

2. In this section, the findings from the case studies will begin with a section on the socio-economic and educational context of each country before addressing the following questions across the five cases:

- What is distance learning and who provides it?
- What is the approach to quality assurance (in general) and to distance learning provision specifically (either currently or planned)?
- How does quality assurance interrelate with the import and export of higher education?

B. Socio-economic and educational contexts

Jordan

Socio-economic context

3. Five Middle Eastern countries border the Hashemite Kingdom of Jordan: Iraq, Syria, Saudi Arabia, the Palestine National Authority and Israel. Arabic is the official language, although English is widely spoken, particularly amongst the middle and upper classes.

4. Jordan has a population of 5.2 million, with a median age of 19 and 40% aged under 15 (Department of Statistics, Jordan, 2002). The majority of Jordan's population (79%) is concentrated in Amman and other urban areas. Literacy is estimated at around 87%, although it is lower amongst women and in rural areas (Geographyiq.com, 2003). The majority of the population is of Arab descent (98%), although there are minority groups of Circassians and Chechens (UNDP, 2001; Geographyiq.com, 2003).

5. Jordan gained independence from the UK on 25th May 1946. Jordan is a dynastic constitutional monarchy. In 1989 parliamentary elections were reintroduced after 22 years and political liberalisation began. The most recent elections were in June 2003. A Royal Committee called 'Jordan First' has produced a

report recommending a series of urgent political, economic and cultural reforms in Jordan, as part of a nation-building agenda (Joha, 2002a; Awadat, 2002).

6. In 1989, due to an external debt of USD7.1bn, the Jordanian government began structural adjustment policies to stabilise the economy, which were largely successful until interrupted by the Gulf War. Jordan has worked closely with the IMF in recent years and has practised careful monetary polices, trade liberalisation and, since the mid-1980s, privatisation has become an increasingly important policy concern. In addition, Jordan has recently entered into a range of bilateral and multilateral free trade agreements since Jordan's accession to the WTO in January 2000, in an attempt to stimulate the economy. Jordan has a free trade agreement with the US (2001), and an Association Agreement with the EU (2002). Jordan's economy was expected to grow by 5.5% in 2003, although the estimated growth in 2002 was only around 3.5% and unemployment is still high (Editor, The Star, Jordan, 2002).

7. Since the accession of King Abdullah II, the Jordanian government has pursued an aggressive economic reform programme. The government has decided to focus less on natural resources and low-cost labour and more on technical innovation and the competitive use of knowledge. In 2001 King Abdullah launched the Economic Transformation Programme for 2002, to be implemented over 4 years and costing JD250m. This programme is designed to promote sustainable long-term growth through public investment in areas such as health and tourism (Export & Finance Bank, 2002).

Education System

8. The Jordan Department of Statistics (2001) reports that 10.9% of the population are illiterate, 55.6% have attained basic education, 16.8% secondary level, and 8.1% Intermediate Diploma level. 8.6% of Jordanians have achieved Bachelor degree level and above.

9. Education in Jordan consists of three main cycles, supplemented by non-traditional education or lifelong learning. The cycles are: basic education, secondary education and higher education. Secondary education is streamed into comprehensive, and applied pathways. The former can be either academic or vocational and leads to the Tawjihi examination that is used for entry into higher education. UNRWA also provides education, health and social services to 3.8m registered Palestinian refugees in Jordan, Lebanon, Syria, the West Bank, and the Gaza Strip, mainly at school level with some scholarships at higher education level.

10. In 1989 Jordan began licensing private universities and the first, Amman University, was licensed in 1990. By 1994-5 students in the 12 private universities approximated 25% of the total student body (Burke & Al-Waked, 1997). Today there are a total of 20 public and private universities in Jordan enrolling around 110,000 students between them (Ministry of Higher Education, Jordan, 2002b). Private universities are able to award their own degrees following accreditation.

11. Since 1981 a network of community colleges has provided non-university higher education. These were formed by converting private and public training institutes and Teacher Colleges into community colleges, in the hope that such institutions would offer specialised, career-oriented training, and prepare their students for work in middle-level professions. UNESCO (2002a) reports that in 2002 there were 39 public community colleges universities in Jordan enrolling around 31,000 students in total. Following a reorganisation in 1997, all public Community Colleges are now co-ordinated by the public Al-Balqa Applied University. A range of agencies run individual colleges and there are currently 17 private community colleges.

12. Public Universities are funded via a Ministry of Education budget sourced from the public sector budget, specific taxation (customs duties, license fees, and "university tax"), and government grants. Funds are allocated to public institutions in a manner that is not well defined. It is up to each individual university to decide how to spend its own budget (British Council, 2003).

13. Tuition fees typically account for around 25% of the public universities' budgets, although this varies from year to year (and has been increasing) and in 2002 tuition fees accounted for 58% of the budget for the University of Jordan (British Council, 2003). The private universities are more heavily reliant on fees' income since they do not receive government funding from the public purse. Students at private universities pay almost triple the fees paid to state universities although this again varies from one university to another and from one specialisation to another (British Council, 2003). Students enrolled in parallel

courses (i.e. taking place in the evenings, weekends, and vacations) at the public universities pay private rates for their fees.

14. Higher education is highly regarded in Jordan, particularly professional or vocational degrees. However, there is growing demand for university places from a young well-educated population.

15. Current Jordanian government education policy is driven by His Majesty, King Abdullah II's plan to develop Jordan as the "hub" of modern commerce in the Arab region through an aggressive plan to modernise the economy and society by integrating information and communications technology in all areas of learning and work. In September 2002 the "Vision Forum for the future of education in Jordan" generated a series of priorities and objectives for educational change covering areas of education and training from early childhood through to higher education and advanced vocational and professional training. The four broad national initiatives developed as the reform agenda by the Forum were:

    - Developing lifelong learning
    - Ensuring responsiveness to the economy
    - Access to information and communications technology
    - Improvements in the quality of learning

16. A draft strategy for developing the ICT infrastructure in higher education was introduced in March 2002 since, although computer literacy and Internet usage is growing in Jordan (212,000 connections in 2001 (BBC, 2003)), many Jordanian universities are not fully equipped with an ICT infrastructure (Joha, 2002b). Part of the strategy involves developing partnerships between Jordanian and overseas universities.

Kenya

Socio-economic context

17. Kenya occupies an area of 582,646 sq. km in East Africa. It is located across the equator with Ethiopia to the North, Somalia to the East, Tanzania to the South, Uganda to the West and the Sudan to the north-west. In 2001 Kenya's population was estimated at around 30.7m with 43% of the population under the age of 15 and 33.4% of the population living in urban areas (UNDP, 2002). The Adult literacy rate (age 15 and above) was 82.4% in 2000, rising from 63.8% in 1986 (UNDP, 2002). Kenya is a multi-ethnic country with administrative arrangements based on ethnic lines. The largest ethnic groups are the Kikuyu, Luhya, Luo, Kamba, and Kalenjin (World Bank, 2003).

18. The Republic of Kenya achieved independence from Great Britain in December 1963. Today Kenya is a presidential republic in the Commonwealth of Nations. The country has enjoyed reasonable political stability, especially in comparison with the rest of the East African region. Recently there has been some political unrest, allegations of corruption, and suggestions that ethnic tensions have once again resurfaced (BBC, 2003). Kenya is also facing the many problems associated with HIV/AIDS.

19. Kenya possesses the most developed economy in the East African region and sees itself as the focal point for Eastern Africa, although it is still classified as a developing economy. It has a fairly diversified economy, with agriculture as the main employer, contributing 24% of the GDP. Kenya's main exports are tea, coffee, and horticultural products, and these contribute 47% of all merchandise exports. Other key industries in Kenya are tourism (19% of GDP) and petroleum products, whilst the industrial sector is relatively small but growing (World Bank, 2003). Kenya aims to be a newly industrialised nation by 2020.

20. Kenya has a large amount of foreign debt (estimated at 4.4bn in 2001), and interest rates account for 10% of government revenues. 15.4% of exports of goods and services are diverted towards debt servicing (World Bank, 2003). As economic growth began to slow from the 1980's Kenya became one of Africa's major recipients of overseas development aid. However, in the 1990's suspicions of corruption and mismanagement of public resources and development funds resulted in a decline in development assistance. To attempt to improve donor confidence and foster co-operation, the Kenyan government has recently established the Kenya Co-ordination Group, which involves stakeholders such as the UN, the IMF and the World Bank (World Bank, 2003). The World Bank currently has a strong presence in Kenya, and is involved in 13 aid projects with a combined worth of over $700m.

Education System

21. The Kenyan education system is structured on the 8-4-4 system (based on the Canadian system), which was introduced in 1985. This replaced the traditional English system based on A-levels and a three-year first-degree course. The 8-4-4 system refers to 8 years of primary education (leading to the Kenya Certificate of Primary Education), 4 years of secondary level studies (leading to the Kenya Certificate of Secondary Education (KCSE)) and finally 4 years (on average) of first-degree studies at university. The first cohort of KCSE students entered university in 1990.

22. The Higher Education sub-sector in Kenya is composed of Universities, Teacher Education Colleges, National Polytechnics, Technical Training Institutes, Institutes of Technology, and Professional Training Institutions. In recent years the government has encouraged expansion at the non-university level to help meet rising demand. Degree level studies take place at the following types of institution:

- Public universities with a Royal charter (including constituent colleges)
- Chartered private universities – fully accredited by Council for Higher Education (CHE) and awarded a Charter by the President
- Registered private universities – institutions that were offering degrees before the establishment of CHE in 1985, and issued with Certificates of Registration after fulfilling the requirements of the University Rules, 1989.
- Private universities operating under Letters of Interim Authority and working towards Chartered status – applied to CHE for establishment, fulfilling the requirements of the University Rules, 1989 and issued with Letters of Interim Authority by CHE.

23. Kenya has five public universities and one constituent public University College. In 2001/2002, public sector universities enrolled 43,347 government-sponsored students or 78% of all undergraduate enrolments (Matieno, 2003). Currently, Kenya has 17 private universities (at least 1 more, Gretsa University, is proposed), six are Chartered, six Registered and five have Letters of Interim Authority. In 2001/2002 self-sponsored students (in public and private universities) accounted for 22% of enrolments and 12,086 students (Otieno, 2003).

24. Non-university institutions are often for-profit and include Colleges, Institutes, Teachers' Colleges and Polytechnics. They are often described as 'middle level colleges', and they have suffered in popularity since the 1980's due to the popularity of university education (Mogambi, 2002). There are four national polytechnics that offer Certificate, Diploma and Higher Diploma (HND) courses. There are 17 Institutes of technology in Kenya, set up through local and provincial initiatives, that provide training for school leavers with the Kenyan Certificate of Secondary Education at Craft and Diploma level. Other higher education providers include 21 teacher training institutes, as well as technical institutes and other colleges. There are over 50 IT academies in Kenya offering education at a variety of levels ranging from basic skills/computer literacy to Diploma and Higher Diploma level, although the more advanced courses are usually foreign in origin and taught by the local academy staff (Njine, 2002).

25. Although they are administratively autonomous, public universities receive part of their funding from the Ministry of Education, the remainder coming from student fees. It is estimated that the government provides around 92% of the costs of higher education, compared with 40% in the secondary sector, and 69% in the primary sector (Otieno, 2003). However, government funding has still been unable to keep pace with the expansion of the university sector and universities are facing increasing pressure to maintain their infrastructure and resources such as library books. This is compounded by the fact that most donor assistance is targeted at basic education. Students contribute to public universities' operating costs through fees, which they pay each semester and which include tuition fees, registration fees and accommodation. In the 1991/1992 academic year the government introduced direct student tuition fees of 6,000 Kenyan Shillings. In 2003 home students were charged fees of 50,000 Kenyan Shillings (public universities) and up to 450,000 Kenyan Shillings in the private universities, whilst overseas students were charged a maximum of 450,000 Kenyan Shillings (UNESCO, 2001). The British Council reports that the concept of 'harambee' is well developed in Kenya whereby the community may contribute towards the initial cost of an overseas education for talented students, with the student looking to become self- supporting for the remainder of the programme (GETIS, 1998).

26. Kenya finds itself in a similar higher education context to that of many of its African neighbours, a context also shared by other nations in the developing world. Key issues include large increases in enrolment, economic constraints leading to limited public funding, the need for restructuring and diversifying activities to generate the necessary income to survive and the need for the establishment of private institutions to assist with rising demand.

27. Since independence there has been a focus on improving enrolment in basic education in Kenya, and in 1997 there were more than six million students in primary education (compared with one million in 1963). Aid agencies, such as DFID and the World Bank have also focused their aid for education on the primary sector. However, there are perceived wide variations in quality, enrolment and retention between schools and enrolment rates in primary education declined by over 20% between the early 1980's and 1995. Education is not generally accessible in rural areas, to the urban poor and to some groups of women.

28. Competition for places in the secondary sector is fierce as demand for places is thought to exceed supply (GETIS, 1998). At independence in 1963, Kenya had 30,000 pupils enrolled in 151 secondary schools. By 1991 this had risen to 600,000 students in 3,000 secondary schools, and this expansion has subsequently fuelled increased demand for higher education. In recent years population growth has also increased the pressure on the education system. In 2000, 300,000 students were denied access to secondary level studies due to lack of places (Mogambi, 2002).

29. In the early 1980s there was a rapid expansion of the tertiary sector in response to the high demand for university education from prospective students (Kihara, 2003a). Today, there are around 55,000 students enrolled in undergraduate courses, 78% in the public sector and the rest in private programmes. Between 1995 and 1997 public expenditure on education as a percentage of GDP was 6.5%, and education expenditure accounted for 16.7% of total government expenditure (UNDP, 2002).

30. In the 1980's and 1990's new private universities were mainly theologically based, and offered a limited range of courses. In recent years five more 'secular' universities have been established, which are now awaiting Charters. Today there are 17 private universities with a total enrolment of around 10,000 students. A range of organisations and institutions has applied to establish more private universities in the near future (Kihara, 2003a). However, there are still insufficient places in the university sector, and many students study abroad (CHE, 2001).

Australia

Socio-economic context

31. The Commonwealth of Australia comprises Oceania, the smallest continent in the world, but the sixth largest country (7,686,850 sq. km), located between the Indian and South Pacific oceans (CIA, 2003).

32. The current population of Australia is 19.8m (Australian Bureau of Statistics, 2003) and is almost entirely of European Caucasian (92%) or Asian (7%) descent (CIA, 2003). The majority of the population is located in areas along the coastline, and over 60% live in the 8 capital cities (BBC, 2003). Around 20% of the population are aged under 15, 67% 15-64 and around 13% 65 and above. Literacy is estimated at 100% (CIA, 2003).

33. Australia is a democratic, federal-state system, consisting of 6 states (New South Wales, Queensland, Tasmania, Victoria, Western Australia, and South Australia) and 2 territories (Australian Capital Territory, Northern Territory). There is a bicameral Federal Parliament consisting of the Senate (76 seats) and the House of Representatives (150 seats). The states and territories are relatively independent of the federal government. The role of the Federation is governed by a written constitution that defines its main activities and those that are left to the states/territories including education, transport, health and taxation. In addition, the states can refer powers to the Commonwealth and the Commonwealth can make financial grants to the states for specific purposes.

34. Since the present government took power in 1996 it has sought to reduce total government expenditure. Its economic policies are the continuation of a policy thrust that developed in the 1980s aimed at national economic diversification through building up the service sector, and promoting a competitive market for public and private finance. In the education sector, government policies were designed to reduce the pro-

portion of public funding in the Australian public universities (e.g. funding constraints, incentives, and the promotion of private investment).

35. Australia is a modernised and economically developed nation and a member of the OECD. It has a prosperous capitalist economy, with a per capita GDP on a par with the main West European economies. In 2002 the GDP growth rate was estimated at 3.6%, the inflation rate at 2.8% and unemployment at 6.3%. Today, the majority of the labour force is employed in the service sector (around 70-75%), whilst 20-25% are employed in industry and the remainder in agriculture (CIA, 2003).

36. Australia is part of the UNESCO Asia-Pacific region, although the region does not constitute a single political, economic or cultural entity. Australia is economically integrated with East and Southeast Asia through trade in education and other sectors, although it is also linked to the Atlantic zone. Australia is a member of APEC, the Asia Pacific Economic Co-operation forum, which is the predominant trade body in Asia-Pacific region. The majority of Australia's imports and exports are with developing countries, although significant amounts of both are also with Japan and the ASEAN region, as well as the US and the EU (CIA, 2003). Australia's three main export partners are Japan, South Korea and New Zealand (BBC, 2003).

Education System

37. Compulsory education in Australia begins at the age of six and ends at the age of 15 (except in Tasmania where it ends at 16). There are 3 levels of school education: Primary, Junior Secondary and Senior Secondary levels. Primary and Secondary education is delivered through both government and non-government providers. Around 1/3 of students enrolled in the school sector study in private sector institutions, funded largely by the Federal government (Marginson, 2001).

38. Post-secondary education is divided into two areas, higher education and vocational education and training. There are 3 broad types of post-secondary education institution:

- Universities
- Technical and Further Education (TAFE) colleges
- Private training establishments

39. In Australia, the term higher education institution encompasses universities, graduate business colleges, theological colleges and other institutes of higher learning. There are 45 major (mostly public) institutions and 85 other institutions (mostly private). The higher education sector has a total enrolment of approximately 750,000 students, 75% at undergraduate level and 25% at postgraduate level.

40. There are currently 39 universities (including two private universities) and 7 other higher education institutions funded by the Commonwealth Government. There is also a wide range of private higher education institutions, including theological colleges and providers with specialist interests in particular artistic and vocational fields (UNESCO, 2002). There are 84 non-university private higher education providers operating in Australia, run by professional/industry associations, theological colleges and niche market operators (McBurnie and Ziguras, 2001).

41. Participation in higher education in Australia is relatively high by OECD standards. In 2000, the OECD reported that 67% of the Australian school population qualified for degree courses, and 59% actually entered such courses (Marginson & McBurnie, 2003).

42. In 1987 the Commonwealth produced a White Paper which led to a complete restructuring of the university sector in 1988 (Breen, 2002). Gamage (2000) describes a process of 'corporatization' of university governance, in an attempt to ensure that publicly funded higher education connected more closely to the needs of the economy. In addition, there were moves to expand participation, recruit overseas students and to reform the finance system. This period also marked the beginning of increased Ministerial and Cabinet direction on issues such as entry criteria, enrolment growth, teaching methods, standards, and academic priorities (Karmel, 2003).

43. As part of the restructuring of the higher education sector the previous 'binary' structure of the system with a division into two groups, universities and colleges of advanced education, was replaced by a single "Unified National System" (UNS). There were also incentives for mergers between CAEs and universities (e.g.

Monash university merged with 3 CAEs). As a result the 18 universities and 47 CAEs that existed in 1985 became 30 universities in 1991, and 35 universities in 1994. During the same period enrolment and graduate rates increased by over 50% (Karmel, 2003) and the numbers of overseas students increased rapidly.

44. The Australian government also began measures at this time to restructure the financing of higher education. A greater financial contribution was expected from students, both at home and from overseas. In 1987 an AUD250 student administration fee was introduced, and in 1989 this was replaced by the Higher Education Contribution Scheme (HECS) which marked the introduction of student fees. The government also cut direct funding for universities and by 2001 government funding fell to 47% of university income (it was 85% in 1987), with student fees and charges contributing 37% (including substantial income from overseas students) (Breen, 2002; Marginson, 2003). Research funding was also changed from university block grants to a system of competitive project grants and block grants linked to successful research output.

45. Today, private investment in tertiary education plays a larger role in the Australia than it does in many OECD countries and in 1998 private sector contributions comprised 24.5% of all spending on educational institutions (O'Reilly, 2002).

Malaysia

Socio-economic context

46. Malaysia has a population of 25.05 million of which two-thirds are urban dwellers (nearly 80% in the Malay Peninsula). 33% of the population is below the age of 15 (Department of Statistics, 2003). In 1957, Peninsula Malays gained independence from Britain and in 1963 the Peninsula States were joined by Sabah, Sarawak and Singapore to form a federation of 13 states and 3 Federal Territories. Singapore seceded in 1965 to become an independent city-state. The current literacy rate in Malaysia stands at 97% (Studymalaysia.com, 2002).

47. Malaysia has been broadly politically stable since independence under a multiracial coalition (Barisan National) comprising Malay, Chinese, Indian and ethnically based parties from Sabah and Sarawak. In the period 1969-1971, the New Economic Policy set targets giving preferential treatment to the majority Malay population as part of the social contract drawn up after race riots in 1969. However, opposition to the Policy has since grown and there have been recent efforts to develop national cohesion among the ethnic groups (GETIS, 2000). The Malaysian government's Vision 2020, is seeking to transform Malaysia into a fully developed and industrialised society by 2020. The nine key objectives seek a balance between economic entrepreneurship, scientific development and historic cultural and religious values. This policy direction also marked a move to unite the diverse peoples of Malaysia with a sense of a shared future.

48. Prior to the economic crisis of 1997-8, Malaysia had an annual growth rate of 7.5-9% of GDP and was one of the world's fastest growing and most globalised economies (GETIS, 2000). After the period of recession, from 2000, the economy began to recover and today the annual growth rate is 8.5%. Since 1966, Malaysia has used a series of 5-year plans to guide the drive for national development; these have generally promoted economic diversification through industrialisation and foreign investment. The 7th Malaysia Plan (1996-2000) promoted growth in capital intensive, high technology industries requiring an educated, highly skilled workforce and foreign investment. These objectives required a large amount of public and private sector spending on the technological infrastructure, energy, healthcare and education (GETIS, 2000). Through the Multimedia Super Corridor (MSC) the government is seeking to make Malaysia the centre of excellence for multimedia industries of the future (http://www.msc.com.my). By 2002, 23 higher education institutions had MSC status conferred marking them out as proficient in key aspects of ICT such as infrastructure and content development, research and training (Ministry of Education, 2003).

49. Malaysia is a member of the Association of South East Asian Nations (ASEAN). Formed in 1967, ASEAN is focused on common political, economic and trading policies as part of a Free Trade Area created in 2000 (GETIS, 2000). The current Prime Minister of Malaysia has pursued policies to transform Malaysia

into the economic, political and educational hub of South East Asia and has also promoted the country's Asian identity in an attempt to counterbalance Malaysia's traditional alignment with the West.

Education System

50. Malaysia's education system was inherited from Britain but soon after independence, from 1961, a process of 'Malaysianisation' began, and the government has been highly interventionist in using education to fulfil key economic and social objectives. Primary education (7-12) is 'free to all' and the enrolment rate is 97% in national schools, religious schools, Chinese and Tamil schools. Secondary education (from 12-18, organised in 3 levels) is also free. Post-secondary level covers the ages 18-19 and prepares students for entry into local public universities, private colleges and universities and other institutions of higher education, or for entering the employment market. Post-secondary studies either take the form of pre-university courses (largely public sector) or technical/vocational courses leading to Certificates and Diplomas (largely private sector).

51. The terms 'higher' and 'tertiary education' are used to describe education that follows completion of the Malaysian Certificate of Education Examination (SPM). Higher education takes place in universities and other institutions of higher learning in a wide range of subjects and with a diversity of delivery modes including examination only, distance education, conventional and mixed mode. New legislation in 1996 (covering both public and private education systems) marked the beginning of major democratisation and liberalisation of the higher education sector. Between 1996 and 2001, there was a 95.2% increase in the number of higher education providers in Malaysia, mainly due to the increase in the number of private sector institutions (Suleiman, 2002).

52. The Malaysian tertiary system is diverse. Today there are over 600 higher education institutions, and the main types include public universities/university colleges (17), private universities/university colleges (12), overseas branch campuses (4), 1 virtual university (UNITAR), 1 Open University (UNITEM), private colleges (518) and IT academies. Community colleges (12), polytechnics (13) and teacher training colleges (27) are categorised as non-higher education post-secondary education. The majority of enrolments are in the private sector colleges and public universities. The current tertiary education participation rate in Malaysia is around 24% with demand still unmet (UNESCO, 2002). The 8th Malaysian Development Plan (2000-2010) has an expansion target of 40% for the 18-24 age group by 2020, with targets for each type of provider. However, the government is also seeking to ensure quality and recently closed over 100 private colleges.

53. Education has traditionally had a high political priority in Malaysia. Since the mid-1990s, Malaysia has focused on the 'K' (knowledge-based) economy as the key to economic, political and social competitiveness. The Malaysia Plans detail four areas of current higher education policy: increasing access to higher education and maintaining standards; developing links between higher education and national economic development (including increasing the output of science and technology graduates); improving the quality of indigenous higher education provision and linking higher education with national culture and identity. In implementing this policy, the government aims to enhance the role of the private sector, increase the number of enrolments in public universities and encourage public universities to generate the majority of their operating costs through revenue-generating activities. The government is also aiming to create a university and a community college in each state, and the cabinet recently approved the establishment of four technology-based institutions (Austrade, 2002).

54. Malaysia spends 22.7% of total capital expenditure on education at all levels and 38.8% at tertiary level. The national budget allocation has increased annually since 1996 and in 2003 the allocation reached US$2.4bn. In 2002 this allocation represented 26% of the total budget (Suleiman, 2002) which is the second highest level of public expenditure on education amongst World Economic Indicators' (WEI) countries (World Bank, 2003). There is a wide range of tuition fees in public universities, depending on the subject and a variety of mechanisms to enable students to pay their fees including non-repayable scholarships, Education Funds (loans from various sources), investment schemes and bank loans. Students can also access government loans to study in approved (accredited) private higher education institutions. In 2000, approximately 29,000 students in private education benefited from such funding. (EPU, 2001).

55. In September 2002 RM30m was allocated to finance education programmes and to develop the infrastructure for ensuring quality. The government views higher education as a profitable export industry and wishes to establish Malaysia as the regional centre for excellence in higher education in the ASEAN region. The government also wishes to reduce the loss of foreign exchange by encouraging more education in Malaysia and less study overseas and by increasing research and development capacity. Universiti Malaya, Universiti Sains Malaysia, and Universiti Kebangsaan Malaysia have been designated as research universities and more resources have been channelled to improving research and development capacity.

56. These objectives have resulted in a renewed emphasis on quality assurance, including the development of the Malaysian Qualifications Framework. Total Quality Management practices such as benchmarking and Quality Audit are now prevalent and there has been a shift from the idea of collegial self-governance to one based on the principles of corporate managerialism directed at market objectives (Lee 2002a).

United Kingdom

Socio-economic context

57. The United Kingdom of Great Britain and Northern Ireland, or the United Kingdom (UK) is located in Western Europe between the North Atlantic Ocean and the North Sea, around 35 km from the north-west of France. It comprises a series of islands including one-sixth of the northern part of the island of Ireland (CIA, 2003).

58. In July 2003 the population of the UK was estimated at around 60.1m with eighteen percent of the population below the age of 14, 66% aged 15-64 and 16% over the age of 65. The literacy rate in 2000 was estimated at around 99% (CIA, 2003). The majority of the UK population is English (81.5%), although there are sizeable Scottish (9.6%), Irish (2.4%), Welsh (1.8%) and Northern Irish (1.8%) populations. In addition, the UK has a multicultural population as a legacy of its Empire and there are also other significant minority groups (2.8%) particularly West Indian, Indian and Pakistani.

59. The UK has a bicameral parliament with two parts, a House of Lords comprising 618 representatives and a House of Commons with 659 seats (CIA, 2003). The present government follows a political philosophy of "the third way" social democracy, which emphasises free-market capitalism with a role for the state in developing social justice and equality (CIA, 2003).

60. Devolution has been particularly important in recent years and the Scottish Parliament, the National Assembly for Wales and the Northern Ireland Assembly were established in 1999 and held elections in the same year. The possibility of devolution for the English regions has also been discussed. Local government is in the UK is organised at borough, county, city and district level on a country basis (CIA, 2003).

61. The UK is a member of a large number of regional and international organisations. It is one of five permanent members of the UN Security Council, and is also a founding member of NATO, and of the Commonwealth. The UK is a member of the EU, but is currently unsure as to the degree of its integration with continental Europe (CIA, 2003).

62. The UK has one of the largest economies in the world and is a leading trading centre. Since the end of the two 20th Century World Wars it has dismantled its Empire and restructured itself into a modern and prosperous European nation. The economy has shifted from a manufacturing to a service-based focus and the City of London is a global financial centre. Since the 1980's successive governments have greatly privatised a range of public sector organisations and businesses and have sought to contain the growth of social welfare programs by encouraging improvements in management and increased private investment (BBC, 2003; CIA, 2003).

63. The UK has a highly mechanised agriculture industry, large fossil fuel reserves (accounting for 10% of GDP), although the service sector (especially banking, insurance and business services) accounts for the largest proportion of the GDP. In 2002 the estimated GDP growth rate was just 1.6%, however, the economy is one of the strongest in Europe and inflation, interest rates and unemployment (5.2% in 2002) are relatively low (CIA, 2003). In 2001 58% of exports and 52% of imports were with EU member nations, and 15% of exports and 13% of imports were with the US.

Education System

64. The education and training systems of England, Wales and Northern Ireland are broadly similar, but in Scotland there has always been a separate education system with its own laws and practices. There are three broad sectors in the UK education system, although there are number of overlaps between these:

- School education (aged 5-16)
- Further Education (16+)
- Higher Education (18+)

65. There is also an independent/private education sector in the UK. Most private institutions are at pre-school and school level, although there are also private institutions at the other levels. Compulsory education in the UK begins at the age of 5 and ends at the age of 16. Prior to this level there is also a pre-primary level. Post-compulsory level studies are offered to students aged 16+ and include a range of programmes that are both academic and vocational, and can be taught via a variety of delivery modes in a wide range of institutions.

66. Academic post-compulsory courses are generally taken by students aged 16-18 and lead to the General Certificate of Education Advanced Level (GCE A Levels)/General Certificate of Education Advanced Supplementary (GCE AS Level) qualifications which are the main criteria used for entry into higher education. After taking GCSEs students stay on in the sixth form at some schools or enter sixth form colleges to study for two years. In addition other institutions also offer A Level courses, such as private tutorial colleges and boarding schools. Some schools and colleges also offer the International Baccalaureate (IB) which is mainly taken by overseas students.

67. Other students leave school and enter further education institutions to study vocational and academic courses from foundation to degree level. The term further education (FE) is used to describe education and training for persons over compulsory school age (sixteen years) outside the school and higher education sector. There are over 600 state-funded and independent FE colleges in the UK (EducationUK). FE is often vocational or work based with emphasis on the needs of employers, and colleges are expected to build strong links with their local community. Education is offered free up to the age of 19 for all UK students and disadvantaged groups. Many colleges enrol several thousand students of all ages; in many colleges the majority of students are over 21 and three-quarters study part time.

68. Some FE institutions also offer higher education courses and many provide qualifications that are accepted for entry into UK universities. Some colleges have extensive links with higher education institutions including articulation arrangements and many offer professional qualifications.

69. All UK courses above GCE Advanced level (A-level)/NVQ Level 3 or Scottish Highers standard are classified as higher education in the UK. In 2003 more than 1m 18-21 year olds in the UK were enrolled on a higher education course, on one of around 50,000 courses at around 500 universities and colleges (aimhigher). There are 1.8m full-time and part-time students in UK higher education, including over 300,000 international students from 180 different countries.

70. Three main types of institutions provide higher education in the UK: universities, colleges and institutions of higher education, and art and music colleges. The range of higher education institutions available includes the following types:

- University
- Open University
- College and Institution of Higher Education
- Open College
- College of Technology
- Teacher Training College
- Institute

71. The vast majority of British universities are state financed, although a few private universities do exist, most prominently the University of Buckingham.

72. While FE and higher education institutions provide courses to adults living in their region, Learndirect (the brand name for the University for Industry (UFI)) aims specifically to stimulate demand for lifelong learning by providing access to high quality, flexible, innovative courses, 80% of which are delivered via the Internet. In addition, the National Open College Network is a national organisation that accredits regional Open College Networks (OCNs) that provide accreditation and support for local learning. Commercial training providers in the private sector offer work-related training to companies and individuals. Such short courses may not lead to academic qualifications and no recognised accreditation system currently exists for such courses.

73. Higher education institutions gain their income from a range of sources, and the exact balance between them depends on the institution. Sources include:

- a central Government grant paid through the three Higher Education Funding Councils in England, Wales and Scotland, and the Department of Education in Northern Ireland
- tuition fees paid by students or Local Education Authorities to fund teaching costs
- grants from research councils and the Arts and Humanities Research Board (AHRB) which fund individual research projects and support related postgraduate training
- private sources such as charities and industry who fund specific research programmes

74. UK students have to pay a maximum contribution towards tuition (fee) of £1,125 a year (2003-2004) for full-time undergraduate courses, but up to £18,000 for postgraduate courses. The level of undergraduate fee is assessed on the basis of the income of the student and of the student's family. Fees vary for part-time and flexible learning courses, but help is available for students on benefits or a low income. In 2002, around 60% of UK students had some of all of their fees paid by the government. Changes are proposed to the student fees system in 2006. Currently it is expected that there will be no-up front fees, and that fees will become part of loans paid back when students start earning more than £15,000 a year. Repayments will be dependent on how much over £20,000 students earn, and if they stop earning they stop paying. There are plans to introduce variable fees from £0 to £3,000 per year depending on course and institution (aimhigher).

75. EU students pay the same as UK domestic students. International students from outside the EU are not subsided by the state and pay overseas student fees that can be 3 to 10 times the domestic fee at bachelor level and 2 to 3 times the fee at graduate level.

76. Key policy initiatives include promoting lifelong learning, increasing access to higher education to under-represented groups, developing and commercialising high quality research, and increasing the collaboration between higher education and the business sector. In addition, the government is keen to promote the UK higher education brand overseas to increase the numbers of international students studying on UK courses in the UK and overseas through a variety of modes of delivery.

C. What is distance learning and who provides it in each country?

Jordan

77. The British Council notes that, to date, most distance learning provision in Jordan has come from abroad. There are currently 17 in-country delivery programmes run by four British universities and two American universities, all of which are accredited and recognised by the Higher Education Council (British Council, 2003). Students registered on these programmes are provided with the syllabuses of these courses and then study on their own through on-line learning and sometimes video conferencing. Each student has a local supervisor as well as a supervisor from the foreign university and the foreign supervisors provide face to face learning for a period of three to four weeks in each semester. Awards/Degrees are issued from the foreign university and the local universities only administer the programmes and provide the required facilities to their students. In addition, local private institutions mainly offer professional courses (post-experience) that are hard to find in Jordan, but these qualifications are not recognised by the government (British Council, 2001).

78. Jordan's own experience in distance learning began with the Jordan Distance Learning Center, launched in July 2001, as the Jordanian affiliate of the World Bank project on a Global Development Learning

Network (GDLN). The Center is hosted by the University of Jordan and is primarily aimed at providing interactive learning capabilities for the GDLN learning centres throughout the developing world.

79. Locally developed provision is just emerging. The University of Jordan (a prestigious public university) has developed 2 on-line post experience courses in IT, and Engineering Management as pilot courses to test the technology, and more may be rolled out if and when accreditation criteria are published. A new local open university is planned, based at the site of the Hashemite University, to compete with the Arab OU (British Council, 2001). This will teach in English, at Bachelors level and operate regionally. Courses have not been established as yet, but they are under development.

80. At regional level, small pockets of distance learning provision have been developed in recent years. The Arab Open University currently dominates regional provision although the Syrian Virtual University began operating in May 2002, and there are other programmes offered by individual universities in the region. The AOU is a not-for profit organisation and aims to "provide opportunities for education for those who didn't have the chance to continue their higher studies for economic, social or geographic reasons". It focuses on widening access, especially for women (Awadat, 2002a) and uses a mix of text-books, videos, audiocassettes and educational CD-ROMs (Khader, 2002c). The University will also be connected through a VSAT on-line connection in the future. Lectures and exams are organised in several centres in addition to Amman. The AOU has links with the UK Open University covering the licensing of materials, consultancy, accreditation and validation. Courses will be accredited by the Open University Validation Service so that the AOU may award students a BA or BSc from the UK OU in addition to their Jordanian qualification. Courses are in English, except for specialist areas of Islamic study (Awadat, 2002a). The AOU projects a total student body of 70,000 within 10 years and 200,000 at maximum capacity. It is hoping to recruit 3,000-5,000 students in the Jordanian branch, from both within Jordan and beyond (Del Castillo, 2002).

81. The Syrian Virtual University was established in May 2002. It aims to lead the online education movement in the Arab region and link with Western online Universities, so students will not need to travel abroad. To date, links have been made with US and Canadian universities and students will be able to study for internationally accredited degrees. The SVU intends to specify the same requirement for enrolment and graduation as home countries, so as to demonstrate its commitment to quality (UNESCO Regional Office for Education in the Arab States, 2002).

82. Other providers enrolling Jordanian students include:

- Al Quds Open University (QOU)(Jerusalem). This was set up in 1991 by the UN to create higher education opportunities for Palestinians and was accredited by the Association of Arab Universities (AArU) (Elias Mazawi, 2000). Courses are text based, with limited face to face contact. Qualifications are not considered comparable to local degrees by the public (British Council, 2001).
- The University of Jubs (Sudan) offers popular distance learning Bachelors, Masters and PhDs to 300 undergraduates and 400 postgraduates in Jordan. Only the Bachelors are recognised in Jordan under reciprocal recognition agreements between active members of the Arab League. In 2001 the then Jordanian Higher Education Council asked Sudanese universities to accept only students referred by Jordanian institutions.
- A Saudi University (KFUPM) is currently spearheading development of a Saudi e-university network on instructions from the Saudi Higher Education Council.

Kenya

83. At local level, Chale and Michaud, writing in 1997, describe Kenyan distance education as predominantly split between public (e.g. ministries) and private sector (e.g. colleges) provision. The majority of provision was in schools or for teacher training. However, other providers such as NGOs and church organisations also provide distance education courses on topics such as conservation, HIV/AIDS and women's rights. Most programmes were delivered using dual-mode delivery including residential and external study. They noted that problems with funding, expertise and the lack of necessary ICT and audio-visual equipment hindered attempts to offer courses using distance methods and found that communication was often difficult.

84. However, in recent years there have been moves to improve the ICT infrastructure in the Kenyan education system. In 2001 the Kenya Education Network (KNET) was set up to help improve the ICT capacity of 23

higher education institutions in Kenya (public universities, private universities, national polytechnics, and 2 other institutions offering technical and professional courses). This was supported by the Kenyan government and the US via USAID, the Leyland Initiative and Insight Technologies (Agatu, 2001).

85. The University of Nairobi offers an external degree programme for the Bachelor of Education in Arts-based subjects, a postgraduate diploma in education and an extramural continuing education programme by the distance mode. Due to problems with the ICT infrastructure, much of the teaching takes place via the short intensive face-to-face mode of delivery. The University claims that the BEd is the first wholly online Bachelors' programme in East and Central Africa (with 150 enrolments).

86. Kenya Medical Training College (KMTC) in association with the Ministry of Health, trains all para-medical technical personnel in Kenya and the Africa Medical Research Foundation (AMREF) uses distance based methods (mainly printed material) to upgrade the skills of health workers in rural areas.

87. The main regional provider is the African Virtual University (AVU) involving Kenyatta University, Egerton University, Maseno University, Moi University and the BITC Institue (Nairobi). The AVU is a regional and inter-governmental distance learning institution based in Nairobi with over 34 Learning Centers in 17 African countries. The AVU was set up with the support and the use of facilities from the World Bank and assistance from vice-chancellors in a number of African universities. The AVU is now independent of the World Bank and during Phase 3 (2002-2007) is expected to expand to 150 learning centres in 50 African countries, to introduce four-year degree programs in Computer Science and Business studies (in French and English) and to develop its own communications' infrastructure (i.e. a hub, studio and VSAT at its headquarters in Nairobi). The AVU was established to help address some of the key problems of African higher education such as higher education places to meet demand; government budgetary constraints; expensive and oversubscribed private tertiary institutions; a need for skills upgrading in the labour force; and African isolation from the Global Knowledge Society.

88. The AVU offers electronic distance learning programmes to provide students and professionals in Africa with skills that can support economic development in their home countries. The AVU provides educational programmes (undergraduate and postgraduate degrees, certificate and diplomas), a digital library (containing, e-books, online journals, etc.), access to high speed Internet services, computer labs with multimedia PCs in the learning centers and an online portal containing information relevant to African education, resources and best practice in teaching and learning.

89. International partner institutions initially deliver the courses electronically via Satellite and the Internet. They also accredit the programmes and award degrees. However, they are expected to help build capacity at a selected African institution which will subsequently take responsibility for providing the course themselves. The AVU assists the African institutions with the technological infrastructure, provides local facilitators, and expects the international institutions to help develop expertise, knowledge and skills in instructional design and delivery for the African institutions. All learning materials are developed in ICT enhanced formats that can be easily disseminated updated and marketed.

90. All tuition and registration is organised in the AVU Learning Centers (LCs) which are supervised by facilitators trained in synchronous and asynchronous delivery and who operate in close consultation with the lecturer and teaching assistant teams. Programmes are delivered using a flexible, mixed mode delivery approach that integrates synchronous video broadcasting, online materials, pre-packaged learning materials on CD-ROMs and DVD and synchronous chat sessions. Teacher-learner interaction is primarily by e-mail and via online chats during synchronous lecture sessions. Students also have access to online discussion forums with their teaching assistant throughout the duration of their programs.

91. Overseas providers also offer courses directly or use local agents that have responsibilities ranging from administration to organising teaching. For example (Njine, 2002), Kenya College of Accountancy organises courses from the University of South Africa and the University of London has an arrangement with the Kenya School of Professional Studies. Other international providers offering distance education in Kenya include Cambridge International College, the Indian Management Training Institute, the International Correspondence University and New Port University.

Australia

92. Distance education has played a significant role in higher education in Australia for over 80 years (the first distance programme at university level was in 1911). The geographic size of Australia and the small number of large population centres in its early years meant that, for many students, distance education provided their only opportunity to gain a university degree. Today, many students choose to study by the distance mode, even in urban areas, due to the flexibility it offers.

93. Distance education courses are delivered by both public and private institutions in Australia. Traditionally, distance education was text-based, but Australia has been an early adopter of new education technologies and although many courses are heavily text-based, universities also use a range of delivery modes, including on-line courses, email, telephone, video-conferencing, web TV, radio and television. Many universities have Virtual Learning Environment (VLEs) and some of these are integrated in wider Managed Learning Environments (MLEs) (Boezerooy, Petra (ed.), 2002).

94. Australia has always utilised the dual-mode or mixed-mode approach in which the courses and awards studied for via distance education are identical to those provided on campus. Today many courses are multi-modal in terms of delivery and there is a large degree of overlap between on-campus and distance education courses and students often study for particular modules on their course online. On many multi-mode courses students can enrol, receive lectures and tutorial materials, gain access to libraries and other university services and submit assignments on-line. Often the term flexible delivery is used to describe such courses, as they allow students (some of whom work full-time) to study at their own convenience (UNESCO, 2002).

95. In addition to individual university provision, Open Learning Australia (OLA) is an alternative way of providing higher education and vocational education and training courses. It is owned and operated by a consortium of universities and acts as a broker between students and provider institutions in Australia. It arranges bridging units, vocational education and training/TAFE units, undergraduate units and postgraduate units leading to formal qualifications in the Australian Qualifications Framework. Units are delivered in a variety of methods including print-based subject materials, on-line services, videocassettes, CD-ROMs and television and radio programmes (UNESCO, 2002).

96. In the last decade, most Australian universities have developed on-line programs either additional to or, more often, mirroring face-to-face programs in selected areas (Marginson and McBurnie (2003) reporting Gallagher, 2001). A minority of Australian universities has set out to develop all courses in on-line form, and the University of Southern Queensland has invested in international e-learning as its primary mode.

97. The Department of Education, Science and Training (DEST) recently classified online courses in Australia into 3 main types (DEST, 2002).

- Mode A: web supplemented courses with optional online participation
- Mode B: web-dependent where students must either a) interact with content or b) students must communicate using the web, or both
- Mode C: a fully online course.

98. DEST research conducted in 2001 amongst 40 Australian universities discovered that 31% of all online courses are not offered by other modes of delivery, and that 90% of all online courses are at postgraduate level. Most online courses were in Management and Commerce, Health and Education. The research also found that 45% of Australian universities made no use of web-supplemented learning, 40% used Mode A, and 5% mode B or C (DEST, 2002).

99. Open Learning Australia and the University of New England are Associate Members of the Asian Association of Open Universities. This is an association of higher education institutions in the Asian region, founded in 1987 and concerned with education at a distance (i.e. education in which the systematic teaching and the communication between student and teacher or institution takes place mainly by multimedia means).

100. Australia is also a big supplier of offshore distance education. In the second half of 2001 Australia enrolled 12,887 offshore distance education students, a 25% increase from 2000. Enrolled students resided in

Singapore (3,643), Hong Kong (2,093), Malaysia (1,590) and China (813) (Marginson and McBurnie (2003) reporting IDP, 2002).

101. Studyaustralia.com.au describes 4 types of Distance Education delivered overseas by Australian providers:

- courses taught in association with institutions in the host country involving local staff
- regional study centres in other countries established by Australian institutions
- courses involving Australian lecturers and tutors providing short periods of face-to-face tuition
- on-line interactive courses delivered via the Internet.

102. Today Marginson and McBurnie report that the majority of students enrolled in distance based courses offered by Australian institutions overseas receive both Internet-based and postal study materials. They also receive some face-to-face services in learning centres in local study centres managed by partner organisations in the country concerned. A survey of providers by IDP Australia in 2000 found that only 1% of programs were purely on-line in character (Marginson and McBurnie (2003) reporting Davis, et al. 2000, 42).

103. In 2000, there were a total of 95,360 students studying at Australian universities through distance education arrangements ('external arrangements' including e-learning and other distance-based modes), and of these 85,284 resided in Australia. In 2001 there were 102,000 external students, and some of the more technologically advanced universities have 65-75% of their students studying off-campus (DETYA, 2002; Boezerooy, Petra (ed.), 2002).). In 2001, distance education students (local and overseas) represented around 14% of the total university enrolment in Australia (DETYA, 2001). Marginson and McBurnie (2003) report that in 2001 a net $107.1 million was obtained in revenues for distance/on-line and off-shore provided education.

104. In 1997, The University of Melbourne (with partners in Australia - Universities of Queensland and New South Wales - New Zealand, the USA, Canada, Scotland, England, Singapore, Hong Kong, China, Germany and Sweden) also established Universitas 21 (http://www.universitas21.com/) described as 'an international network of leading research-intensive universities'. It currently has 17 member universities in 10 countries and intends to facilitate collaboration and co-operation amongst its partners and create entrepreneurial opportunities on a scale that none could achieve independently or through traditional bilateral alliances. Universitas 21 has already generated spin-off benefits in the form of collaborative research programs, student and staff exchange, international benchmarking, and cross-border fertilisation of curricula. There is potential for the development of joint degrees and the mutual alignment of 'feeder' programs (Marginson and McBurnie, 2003).

105. In 2001, Universitas 21 signed a contract with British educational publisher Thomson Learning, creating a joint venture company, Universitas 21 Global, with headquarters in Singapore that is expected to offer online education with a focus on Asia. In May 2003, the company launched an online MBA (http://www.u21global.com/cgi-bin/corp.dll/portal/ep/home.do). It is intended that the participating universities in their relevant jurisdictions will accredit the Universitas 21 Global courses, utilising the quality assurance arm of Universitas 21, U21pedagogica.

106. In 2001 it was announced that the World Bank (contributing $1.3 billion over five years) and the Australian government agency AusAid (contributing start-up funds of $200 million) would collaborate in a $1.5 billion 'Virtual Colombo Plan' to develop cross-border distance education in the developing world. Initially this will involve providing and supporting distance learning programs for training and upgrading teachers. Universities and other providers will bid for contracts to provide programs to 12 countries in Asia, the Pacific and Africa (Borton, 2001). Marginson and McBurnie (2003) report that the Virtual Colombo Plan faces formidable long-term difficulties since it needs to secure viable local partners and sustainable technologies, and to tailor these technologies and course content to local circumstances (Marginson and McBurnie, 2003).

Malaysia

107. Distance learning provision is well established in all Malaysian public universities and companies specialising in e-learning are rapidly establishing themselves in Malaysia. The growth in distance learning provision in Malaysia began in the early 1970s (via the off-campus programme in the University of Science

Malaysia). Distance learning courses are targeted at a range of different student needs, including students who failed to gain places on full-time courses, 'second chance' students in employment, upgrading for specialists and studying for pleasure (British Council, 2001, Ministry of Education, 2003). On-campus students are also able to make use of e-learning opportunities.

108. In 1998, eleven public universities created a private company, Meteor Distance Learning (MDL) Sdn. Bhd. In 1999 Meteor was asked to form UNITEM (Universiti Terbuka Malaysia – the Open University of Malaysia) by the Ministry of Education. UNITEM enrolled its first students in August 2001 and it is expected that UNITEM will ultimately take over all distance learning programmes from the public universities and will deliver open and e-learning opportunities throughout Southeast Asia (GETIS, 2000).

109. UNITEM offers courses by distance learning via a mixed mode of 30% digital, 30% print, and 40% face to face/video-conferencing. The face to face component is offered in partnership with universities nationwide. UNITEM adapts existing courses and also sets up additional courses using e-learning specialists, who also offer expertise on course design commercially to other institutions.

110. UNITEM has collaborated with the UK Open University and formerly with Scottish Knowledge with the intention of adapting distance learning materials from the UK. UNITEM has also collaborated in the same manner with Shukotai Tammatirat Open University in Thailand.

111. Malaysia also has a Virtual or E-University, Universiti Tunku Abdul Razak (UNITAR). It received its charter as part of the Government's Multimedia Super Corridor (MSC) initiative in December 1997. In January 2000 the Ministry of Education approved its registration. UNITAR offers vocationally focused courses in Business & Management, IT, Science and Combined Arts leading to Bachelors degrees, MBA, research Masters and PhDs. It also targets students who failed to gain places on full-time courses, and access students in employment.

112. UNITAR offers courses in English by distance learning using a mixed mode delivery. Originally delivery was 60% CD-ROM, 30% Online, and 10% face-to-face, although it is now moving more on-line as connectivity improves. It has modified its original plans to rely solely on on-line learning and has introduced a network of support centres for its distance students. These have also been established overseas where it has students in countries such as Cambodia. Like UNTIEM, UNITAR offers expertise in course design commercially since there is much local expertise in this area (British Council, 2001).

113. At a regional level, some private colleges and some public universities have programmes with the Cambodian National University and the Multimedia University. Several private colleges already operate regionally.

114. Due to the well developed indigenous provision there has not been much need for international provision, except where foreign courses have international recognition and reputation that is attractive to Malaysian students and popular with employers. Some students want foreign degrees and the government is keen both to increase choice and to make foreign degrees available locally. Foreign distance based courses started to appear in 1998 and have tended to focus on professional qualifications, external degrees, and vocationally based courses such as MBAs. Professional courses such as Accountancy and Law continue to be offered via distance learning and there are over 70,000 Malaysian students taking UK professional courses at a distance, mostly in accountancy, finance, commerce, and marketing. There is also Australian provision in these areas. The international reputation of these professional courses also attracts Chinese and Indonesian students who view the courses as a route to working in the USA.

115. In recent years, the Malaysian government has actively promoted distance learning. The government has encouraged indigenous providers to meet as much of its training needs as possible. Overseas providers are only encouraged to offer courses where local provision is weak or underdeveloped, e.g. business and IT at present, and potentially Health Studies, Applied Psychology, and Environmental Studies (British Council, 2001).

United Kingdom

116. 'Distance learning' is defined by the UK Quality Assurance Agency (QAA) as: 'a way of providing higher education that involves the transfer to the student's location of the materials that form the main basis of study, rather than the student moving to the location of the resource provider'. Distance learning is well established in the UK as a mode of study for higher education and professional training.

117. Locally, distance based learning is provided by distance and supported open (or flexible) learning courses (EducationUK; Support4Learning). It is generally based around home study from specially prepared study packs with tutorial support provided by post or email. Some OFDL courses use e-mail, WWW, video-conferencing, but many still use traditional media. In some courses students may need to attend brief periods of classroom study (e.g. face-to-face workshops). Programmes are flexible, but the minimum time for a degree programme is 3 years and some take as long as 8 years. A postgraduate degree takes a minimum of two years and a maximum of 5.

118. Many UK further and higher institutions run distance learning courses, and around 90% of UK face-to-face universities have developed distance education courses in several subject areas and at various levels (British Council, 2003). Both the business and corporate sectors rely heavily on distance learning in the training of their staff. The International Centre for Distance Learning (ICDL) provides a database of distance learning courses (c. 5,000), providers (c.300) and related literature.

119. Weyers (quoted in CVCP, 2000) estimated, in 1998/9, that more than 70 UK institutions offered distance-learning courses in addition to on-campus learning. In 2003, the ICDL database (mentioned above) lists 103 universities and university colleges offering courses by distance learning, which is composed of provision offered by on-campus universities and by designated distance education providers (van de Wende and Middlehurst, 2004).

120. Besides the traditional universities and colleges, there are 4 principal providers of distance learning (at higher education level) in the UK:

1. The Open University (OU) is the largest university in the UK (over 200,000 students and clients a year) and has a world-wide reputation for the quality of its 360 undergraduate and postgraduate courses and supported learning methods. It offers first degrees, postgraduate and professional training, and special-interest subjects by distance-based modes of delivery. Most courses are Certificate, Diploma or Degree programmes, although the OU is also one of the largest training organisations in the UK and provides in-service training for a number of companies. Around 70% of students are in employment and studying to improve their career prospects. The OU has around 158,000 undergraduate students, 25,000 postgraduate students, 5,000 students on Access courses and has sold 29,838 study packs to students who did not want to formally enrol (OU web site). The Open College of Arts, established in 1987, is affiliated to the Open University. It is aimed at students of the arts who wish to study at home (e.g. creative writing, music, video production, garden and interior design). Assessment is optional and courses can lead to credits for entry into UK higher education courses.
2. The University of London External Programme offers students the opportunity to obtain University of London degrees at a distance at a lower cost than on-campus study. The Programmes are conducted by self-study or through full-time or part-time courses offered by a private or state institution overseas (these colleges are not accredited by the University of London). Learning materials are provided at the start of the course and the students then organises their studies and prepares for exams by themselves. The External Programme does provide subject guides, exam papers, and examiner's reports. There is no correspondence or tutorial system although some courses require students to spend a short time in London or at recognised classes. Many postgraduate degrees are full distance learning programmes. Qualifications for both internal and external students are of the same standard.
3. The National Extension College is an independent distance learning/correspondence college offering over 150 professional and non-professional courses including first degrees, A-levels, GCSEs, professional and career-based training.
4. The Open Learning Foundation has forty member universities offering higher education qualifications such as Honours degrees, Higher National Diplomas/Certificates, and MBA (Master of Business Administration). Participating institutions award their own degrees, using OLF materials such as case studies and handbooks that substitute for class contact.

121. In addition there are also other providers of distance education, including the Open College which offers mainly corporate and management courses leading to nationally recognised vocational and professional qualifications and the University of the Highlands and Islands. The latter is a group of 12 FE colleges and research institutes collaborating on higher education projects and research, courses and learning programmes including open, online and distance learning courses.

122. E-learning provision has been promoted by UK eUniversities Worldwide, established in October 2001 to market and support online courses from UK universities to students, business and industry around the world. There are 3 programmes currently being offered to students having been specially created for on-line delivery (numbers of students are not reported). The Open University has also invested heavily in e-learning and is regarded as the UK's main e-learning institution. The OU estimates that 160,000 of its students are on-line and states that 178 of its courses require online access and another 97 allow use of IT (e.g. virtual tutorials and discussion groups, electronic submission and marking, multimedia teaching materials, computer mediated conferencing). Fourteen courses are delivered via the Internet. In addition, its Corporate Open University Services (COROUS) aims to provide innovative and effective learning strategies for training and staff development needs of corporate clients.

123. The Open University Worldwide Limited (OUW) was established in 1997 as the International Division of the UK Open University. The OU began offering overseas courses in 1982 and now there are 28,381 overseas students and 42,170 in collaborative programmes in partnership with local universities, colleges and companies. The OUW has a network of distributors in over 30 non-EU countries (OU web site). In addition, the British Council reports that 43% of all international students enrolled on UK degree courses (c.170,000 students) are doing so in their home country via distance learning (Kemp, 2003).

D. Country approaches to quality assurance in general and specific to distance learning

Jordan

Approach to Quality Assurance

124. In Jordan the term 'licensing' refers to permission for a higher education institution to operate. The term accreditation refers to recognising both the institution and its programmes of study. The former usually occurs before the latter (e.g. the Arab Open University was accredited one year after it received its license) (British Council, 2003).

125. In September 2000, the then Higher Education Council decided to accredit public and private universities equally using a two-stage accreditation process, 'specific' and 'general' (Al Farwati, 2001). Previously, the Council did not accredit or review public institutions, and they could set up programs and construct new buildings without Council or Government approval (Burke & Al-Waked, 1997). Between 1995 and 2000 the Council carried out a form of general and specific accreditation only on private universities which involved 48 committees carrying out accreditation for around 140 different programmes of study. In 2001, the private universities were the first to undergo the new "specific" accreditation process.

126. The accreditation process involves two stages, the first accrediting the institution and the second the content of individual programmes:

- General accreditation: this stage assesses whether the institution has the resources to fulfil a course in terms of staffing, the library, laboratories, and other necessary infrastructure requirements. Each university is verified and accredited in order of their year of establishment (i.e. the oldest institutions are accredited first). If successful, the institution receives a license to provide the course.
- Specific accreditation: a second Council committee of experts evaluates the content of specific university programmes, against criteria set by the Higher Education Council. The Committee assesses facilities, the qualifications and experience of teaching staff, teaching plans, course structure and the availability of library materials. Following this review, the committee asks universities to address deficiencies in the course, and if they fail to respond, the Committee issues warnings and takes disciplinary action.

127. Recently the Ministry of Higher Education has sought to address quality assurance issues in more detail. It has suggested strengthening the accreditation process to place more emphasis on the quality of new programs, suggesting that they should be examined before the licensing of institutions (Ministry of Higher Education, Jordan, 2002b). Measures suggested include:

- Creating a new Higher Education Quality Assurance Council of Jordan (HEQACJ) as an independent national quality assurance body.

- Restructuring the existing Accreditation Council to incorporate all stakeholders, universities, government, employers and professional bodies.
- Specifying that all programs must be evaluated both in-house and externally.
- Setting up a committee to review all existing university programs to abolish repetition and ensure excellence.
- Accrediting all institutions of tertiary higher education.
- Tying financial aid to public universities to compliance with accreditation standards.
- Amending the accreditation process to ensure that new programs are evaluated according to need, feasibility and job opportunities for graduates.
- Relating accreditation directly to a new national electronic test (NET) of student achievement.
- Ranking all programs and universities, and making these rankings public.

Approach to the Quality Assurance of Distance Learning

128. Currently there are no specific criteria for accrediting distance learning and providers must follow the same accreditation process as campus based providers (British Council, 2001).

129. The Council of Higher Education does not recognise degrees obtained solely though distance learning and therefore the market for distance learning is not well developed. The Council requires all degrees to be taught in the country awarding the qualifications thus ruling out courses offered solely via distance learning as a delivery mode. The University of Jordan also requires students to undertake a compulsory 10 hours of community service per semester.

130. The Government's attitude to distance learning is rapidly changing due to their focus on the expansion of information and communications technologies. In July 2002, the government announced plans to introduce distance degree programmes (UG and PG) throughout the country's public and private universities. The government expects the popularity of this mode of delivery to increase over the next decade, with courses available in all higher education institutions and using an ICT infrastructure that includes satellite teleconferencing and use of the Internet (Del Castillo, 2002).

131. The Higher Education Council recently accredited all degrees offered from the newly formed Arab Open University. In 2002 the AOU enrolled 400 students compared to the expected 800. This shortfall was attributed by the AOU to the earlier uncertainty over accreditation, and the decision to license the AOU as a private university, even though it is not-for-profit institution (Khader, 2002c).

132. The uncertainty surrounding accreditation criteria has hindered the development and publication of courses by providers, since they are unwilling to commit themselves before the criteria are known, and students are unsure about the quality of the courses if they are not accredited (British Council, 2001). The demand for professional qualifications is limited, as such degrees do not yet receive official recognition. There is a small market for professional degrees in business related fields such as accounting and management and American providers offer such degrees.

133. The Arab Open University has plans to launch a comprehensive quality assurance programme, and has formed a Quality Assurance Committee (QAC) to administer this initiative. When established, the programme will encompass an ongoing process of reviewing performance and achievement of objectives across all of the AOU's functions, with a particular emphasis on the assessment of student learning and academic achievement. The AOU will also establish a process for continuous quality improvement.

134. The QAC will be responsible for developing the AOU's quality policy, implementing the quality system and undertaking quality assurance activities to ensure that the AOU is meeting quality standards detailed in its mission, as well as local and international standards. The QAC is designed to assist members of the AOU's management by providing them with objective analyses, appraisals, recommendations and comments on reviewed and audited activities. Key areas of quality assurance for the AOU include policies on the use of external examiners on its programmes and student assessment, and explicit criteria for tutor and faculty recruitment.

135. A range of components of the AOU's education process will be monitored and reviewed according to set standards. These include; Students (e.g. admission, learning experiences, assessment and achievement,

employability), Programmes, Teaching Quality, Staff Development, Support Services, Administrative Services, Physical Resources, Academic Management and Quality Control and Records. Standards will be developed with relevant departments, and their implementation will be monitored and assessed on a regular basis by the QAC. The results are analysed and reported to the University Council.

136. In addition, a comprehensive Performance Indicators scheme will be developed. The measurable indicators are intended to provide reliable, consistent and meaningful information for effective academic planning and development. The AOU also seeks to build international partnerships with internationally respected QA organisations (e.g. INQAAHE and the UK QAA) that will include information-sharing, support for staff development and education in quality concepts and practice.

Kenya

Approach to Quality Assurance

137. In Kenya, accreditation refers to a process of quality assurance and control whereby, as a result of inspection or assessment or both, an institution or its programmes is recognised as meeting the minimum accepted standards for offering university level education under section 12 of the Universities Act (Kenyan Education Directory: 9th Edition, 2001).

138. The Council for Higher Education (CHE) is the sole accrediting and quality assurance body for higher education and is concerned with accrediting private universities. Currently accreditation is only applicable for private institutions wishing to achieve university status.

139. Other Government ministries are expected to regulate institutions that they have established (e.g. the Ministry of Health and the Medical Training College) as well as programmes for the training of their personnel by other providers.

140. Public universities are responsible for the quality of their own courses, although some feel that the CHE accreditation system is more rigorous than university quality assurance measures and suggest that it should be used for the accreditation of new programmes (Teng'o, 2003a). Public and accredited universities are responsible, under the direction of CHE, for any other institutions offering their programmes.

141. For any private institution to receive accreditation, CHE must be satisfied that it has adequate physical, human and financial resources, viable programmes and a sound system of governance. During the accreditation process CHE conducts a series of inspections to assess all aspects of an institution's infrastructure and resources, guided by standards and procedures in the University Rules, 1989. The accreditation process is meticulous and can take several years after a Letter of Interim Authority is granted. During the accreditation period the institution operates under CHE (Teng'o, 2003a).

142. Full accreditation occurs when a Charter is awarded, which is when the CHE feels that the institution is able to provide high quality education (Njine, 2002). The institution is then able to operate without direct guidance from CHE, although institutions are still expected to maintain high standards. Whenever an accredited university seeks to offer a new course this must be authorised by CHE according to the quality standards provided by the University Rules (Teng'o, 2003a).

143. Accredited institutions can award their own Degrees, Diplomas and Certificates and their students can access loans from the Higher Education Loans Board. CHE regularly publishes lists of accredited institutions, those with Letters of Interim Authority, and those that are Registered. The Minister for Education, Science and Technology grants the authority to award qualifications by Gazettment in the Kenya Gazette.

144. There is currently no formal accreditation process for non-university post-secondary institutions. However, there are plans for this to be introduced, provided by the Commission for Higher Education, when a new Bill is passed by Parliament. However, some non-university institutions teach curricula developed by the Kenya Institute of Education, and these receive inspection before registration. They are also expected to be inspected post-registration, although this rarely takes place due to lack of resources (Njine, 2002).

145. In addition, courses offered by non-university institutions leading to degrees, certificates and diplomas awarded by public universities are also not currently accredited, although discussions are taking place.

There are concerns about the quality of some of these courses, although the public universities are responsible for quality assurance. Relevant professional bodies approve curricula for students training to be members of their profession (E.g. Engineering Council of Kenya, Council on Legal Education).

Approach to the Quality Assurance of Distance Learning

146. The British Council reports that qualifications obtained by the distance learning route appear to have few problems with recognition (GETIS, 1998).

147. There are plans for a new government Bill where it is expected that all higher education institutions, including trans-national, for-profit, private and electronic providers will be accredited by the CHE. However, the rules for electronic and other distance education programmes are expected to be different to residential programmes (Njine, 2002). In addition, there has been effort in the policy making arena to ensure that standards are comparable to residential programmes (Njine, 2002).

Australia

Approach to Quality Assurance

148. Universities (public and private) must be established under Acts of State or Territory (most institutions) or the Federal Parliament. State/Territory governments have legislative provision for recognising new universities and non-self-accrediting institutions that wish to offer courses leading to higher education awards. Each State/Territory has an Accreditation Authority and institutions wishing to operate in multiple States must seek mutual recognition arrangements between the jurisdictions. They are also expected to have legislative and regulatory mechanisms for monitoring institutions and dealing with the results of critical audit reports that may require remedial action or the withdrawal of approval.

149. After establishment, universities (and some non-university institutions) become self-accrediting, and responsible for their own academic standards and quality assurance processes. They are accountable to their own University Council or Senate which has responsibility for governance and management, and which are in turn accountable to the Federal, State or Territory government in terms of providing key data and agreeing broad objectives. They may also be subject to audits by state-auditors general (Woodhouse, 2003).

150. Accreditation is defined as "a process of assessment and review which enables an higher education course or institution to be recognised or certified as meeting appropriate standards" (MCEETYA, 2000).

151. The Australian Quality Assurance Framework for Higher Education involves 5 main actors, each with their own responsibilities. The Australian Qualifications Framework also informs the quality assurance activities of higher education institutions, both public and private

- The Commonwealth Government, via DETYA, performs an important role in the Australian Quality Assurance Framework. It provides funding to public universities tied to an accountability framework and based on their annual 'educational profile' that includes their Institutional Quality Improvement Plan. These plans include outcomes from national surveys on graduate employability, graduate perceptions of teaching and the Postgraduate Research Experience Questionnaire. Plans are intended to provide information to the wider community about QA in the higher education sector to assist with student choice and accountability. Other Commonwealth activities include a benchmarking manual for HEIs (covering university activities such as teaching and learning, research, finance, internal management, and internationalisation), and the Graduate Skills Assessment (GSA) that assesses the generic skills of university graduates. The Commonwealth also publishes the biennial data 'The Characteristics and Performances of Higher Education Institutions' that provides data about a range of indicators (such as staffing, student retention, finance, etc.). These measures include retention rates and the graduate outcome data for each institution, including graduate full-time employment, graduate full-time study and average starting salary. Finally the Government also supports the Australian Universities Teaching Committee (AUTC) that aims to promote quality and excellence in university teaching and learning in Australia (DEETYA, 2000).

- Australian universities are responsible for their own academic standards and quality assurance, but despite this autonomy, as part of their accountability to Federal and State/Territory Government, universities must develop annual Quality Assurance and Improvement Plans. These describe institutional goals, outline strategies and report on outcomes. Universities all have internal QA systems in admissions, teaching and learning and assessment. These include methods for assessing course proposals, curriculum evaluation, and student feedback. Courses are normally reviewed on a five-yearly basis. The university sector also collaborates on external evaluations of degrees and peer reviews of research proposals, staff exchanges, collaboration in research and benchmarking of course delivery standards (DETYA, 2000). When an Australian university operates in a distant location under its own name, the Council or governing body is responsible for QA. Provision in overseas campuses must have academic standards at least equivalent to those provided in Australia, irrespective of host country regulations. Universities are also expected to ensure standards in franchised courses and other courses where the university is not directly delivering the course (e.g. twinning). Where there are serious concerns about the quality of delivery, arrangements may be subject to review by State or Territory governments (DETYA, 2000).

- Professional bodies and associations play a significant role as external arbiters in the quality assurance framework through accreditation of professional courses in areas such as nursing and medicine, law, accounting, engineering and architecture. These bodies and associations also have an on-going role in monitoring the quality of such courses (UNESCO, 2002).

- State/Territory Governments' responsibilities related to QA in higher education are standardised in the Protocols above. They have responsibility for exercising control over the term "university" and for protecting the capacity to confer higher education awards such as "Bachelor's degree". State/Territory accrediting authorities are listed in the Register of Authorities Empowered by Government to Accredit Post-Compulsory Education and Training Courses on the AQF Web site (UNESCO, 2002). They are responsible for the accreditation of programmes and awards offered by around 100 non-self-accrediting non-university institutions based on the National Protocols.

- The Australian Universities Quality Agency (AUQA) was established to independently verify the quality assurance arrangements that have developed in the higher education sector. It conducts 'whole of institution' quality assurance audits of self-accrediting institutions (mainly universities) and State/Territory accreditation agencies that accredit non-self-accrediting institutions, on a five-yearly basis. In addition to quality audit, the AUQA also assists with improving academic quality in institutions. It is not concerned with investigating complaints from staff or students. The AUQA is a not-for-profit limited company, with a high level of independence from government and other sector institutions. It is funded via the Commonwealth, State and Territory Governments as well as by institutions that it audits. 'Quality audit' should be distinguished from accreditation (as in the USA) and audit is defined by the ISO as: 'a systematic and independent examination to determine whether activities and related results comply with planned arrangements and whether these arrangements are implemented effectively and are suitable to achieve objectives' (Woodhouse, 2003).

152. The audit processes are designed to be transparent and outcomes of the audits are made public. The AUQA also has an objective of dissemination of its activities and good practice via the Internet, publications, consultation and advice, and comparing standards and sharing expertise with other international quality assurance agencies (UNESCO, 2002; Woodhouse, 2003). The AUQA uses the standard external quality assurance (EQA) sequence of procedures which are Institutional self-report; External review team; Team visit to institution; Team report; Agency decision (Woodhouse, 2003).

153. The objective of the AUQA audits is to investigate the rigour and effectiveness of the organisation's performance in monitoring against its plans, to assess whether it has the relevant processes and mechanisms in place, whether it is effective in achieving its goals, and whether it is actively engaged in understanding its performance and using this understanding to improve performance. Responses to the audit reports are the responsibility of the governing body of the institution or the relevant Department and Minister in the case of State agencies. Failure to respond appropriately could result in funding sanctions by the Commonwealth or regulatory action by the relevant State or Territory government. Panels of experts undertake the audits including people with substantial senior academic and administrative experience in higher education, including people from outside academia and from overseas. The auditors received training and meet annually.

154. State and Territory registering authorities handle registration as a training organisation and designation as a Registered Training Organisation (RTO). In 2002, the Australian National Training Authority (ANTA) decided that higher and clearer standards were needed for Registered Training Organisations (RTOs). Therefore, it put in place the Australian Quality Training Framework (AQTF) standards for RTOs. The AQTF is a set of nationally agreed standards to ensure the quality of vocational education and training services throughout Australia. The AQTF ensures that all RTOs and the qualifications they issue are recognised nationally.

Approach to the Quality Assurance of Distance Learning

155. The Australian regulation and quality assurance systems have never distinguished between methods of teaching and learning employed to deliver a programme. The focus is on the quality of the pedagogical approach and on the use of whatever technology allows the student and teacher the best flexibility and outcome (Boezerooy, Petra (ed.), 2002). Students studying via distance education at Australian universities receive the same degrees as their on-campus counterparts and degrees obtained following study in this mode receive the same level of recognition by employers and from other universities as the basis of admission to further study (UNESCO, 2002).

156. Where an Australian university offers courses at an offshore physical location such as a branch campus or through an agent or partner, the institution will be expected to maintain standards at least equivalent to those provided in Australia and carry full responsibility for all aspects of delivery. However, regulating providers without a physical presence (e.g. purely online delivery) is very difficult (McBurnie and Ziguras, 2001).

157. A number of Australian tertiary institutions have received accreditation from the International Council for Open and Distance Education (ICDE) (http://www.icde.org). Other associations that provide advice and guidance on good practice in open and distance learning include:

- The Open and Distance Learning Association of Australia Inc. (ODLAA)
- The Australasian Council on Open, Distance and E-Learning (ACODE)
- The Open Training and Education Network (OTEN) which is the specialist distance education and open learning institute of TAFE NSW, part of the NSW Department of Education and Training.

Malaysia

158. In Malaysia, all institutions of higher education are under the supervision of the Minister of Education. The Higher Education Department of the Ministry of Education co-ordinates and monitors the activities of institutions of public higher learning. Polytechnics are regulated by the Technical and Vocational Education Department of the Ministry.

159. The Department of Private Education (Jabatan Pendidikan Swasta (JPS)) in the Ministry of Education regulates private providers regarding their establishment, registration, premises, fees and student and staff affairs. Any PHEI that fails to comply with the rules and regulations set by the JPS faces legal action.

160. The National Accreditation Board (Lembaga Akreditasi Negara, LAN) was established to provide quality standards and guidelines for the courses offered in private sector institutions. LAN ensures that courses offered by private higher education institutions are of high quality with comparable educational standards to those in the public sector. It conducts evaluation to determine accreditation, and monitors the implementation of compulsory subjects. It also advises the Registrar General of Private Education on the establishment, registration and approval of courses from private higher institutions.

161. Universities in Malaysia can only be established in accordance with an Incorporation Order signed by the King and only on the invitation of the Minister of Education. The 1996 Private Higher Education Act requires all educational institutions to be licensed. The licensing process has two stages. In the first stage the Ministry of Education gives approval to the establishment of a Private Higher Education Institution. In the second stage, the institution applies for registration/a license to offer courses from the Department of Private Education (JPS) following assessment by LAN. After receiving this license an institution can offer courses and then apply for accreditation for its courses of study from LAN (see next section). It can cost a minimum of RM 200,000 in capital to establish a private HEI in Malaysia (Lee, 2001).

162. There is currently no formal qualification framework covering all qualifications and institution types, although progress has been made in this area and a consultation Draft Framework has been sent out for public consultation. Currently there are separate agencies accrediting courses for public and private providers.

163. LAN is concerned with monitoring and maintaining the standard and quality of private higher education institutions (standards are national). It is not currently responsible for institutional assessment, which is under the control of the JPS. Its role covers:

- Formulating policies on standards, and criteria for quality assurance and accreditation for courses of study at certificate, diploma and degree level
- Recommending courses of study for approval to the Ministry of Education
- Conferring Accreditation status
- Setting procedures for evaluation and monitoring. The monitoring process is continuous and spot checks occur throughout the validity period (5 years).

164. All courses offered by the private institutions are evaluated against their own set criteria and standards. The qualifications are subject to a levelling evaluation process (via peer review) against public qualifications set by examinations boards and best practice to ensure consistency in the level of the qualification (Suleiman, 2002). The Malaysian public is informed of accredited courses through the media, but evaluation reports are only available to the providers and other relevant authorities (Suleiman, 2002).

165. LAN's quality assessment process comprises 6 stages: Preparation and Submission of Documents to LAN/JPS; Assessment by the Panel of Assessors; Pre-Approval Visit and Report including scored assessments; LAN Board's Approval; Minister's Final Approval to Conduct the Course; Accreditation of the Course.

166. Accreditation is a higher level of quality assurance certification by LAN and requires a score of 70% in the assessment. The term Accreditation as defined under the LAN Act 1996 (Act 555) means a formal recognition of the fact that the certificates, diplomas and degrees awarded by Private Higher Education Institutions are in accordance with the standard set by LAN. This higher level of quality assurance certification is optional but, for full recognition of the degree course for working in the public sector, LAN and the Public Service Department (JPS) require accreditation status. Accreditation is a more detailed evaluation of the courses and includes interviews with staff, management and students by a panel of peer assessors, observations of lectures, assessment of facilities, and verification of documents. When a course of study at a PHEI has been granted a Certificate of Accreditation, the PHEI can announce this to the public. Only courses of study that have obtained the certificate of accreditation have the right to use the statement "recognised by LAN" in their marketing. A course of study that has achieved a Certificate of Accreditation also has to undergo a process of continuous evaluation (compliance assessment) to ensure that standards and quality are being maintained or improved.

167. Public universities are generally self-accrediting but require the Ministry's approval to conduct new courses. All qualifications from public and foreign universities are subject to recognition by the Public Service Department (JPS) on the recommendation of the Permanent Committee for the Assessment and Recognition for Qualifications (JTPPK), if graduates are to be employed in the public sector. (Suleiman, 2002).

168. In December 2001 a Quality Assurance Division (QAD) was set up in the Ministry, with a remit similar to that of LAN. The QAD aims to provide continuous quality assurance via Quality Audit across all public universities by faculty and discipline to improve programmes and promote public confidence. From December 2001 to March 2002, procedures, standards and criteria were drafted and from May 2002, work began with discipline panels to test the procedures. Trial audits started in January 2003 and 10 have taken place to date, in IT, Medicine, Science, Dentistry and Engineering. There are nine generic standards covering learning outcomes, the program design covering specific discipline content & variety of teaching, the link between assessment and outcomes, entry requirements, academic faculty, educational resources & student support, programme evaluation, leadership and governance and continuous quality improvement. There will be a 5-year cycle in the future.

169. All professional courses must obtain approval to enable them to recruit students in Malaysia. Generally the approval process involves the professional bodies where a joint technical committee has been established, and this committee looks at criteria, standards and accreditation matters jointly with the professional bodies. As a matter of principle, the professional bodies in the country of origin must accredit a for-

eign qualification before it can be recommended for approval in Malaysia. For some professional qualifications, the qualification must also be recognised by the local counterpart before approval is given to a private institution to conduct the course.

170. Technical Committees with representatives from accreditation authorities (including LAN) manage accreditation exercises. Using these committees reduces the number of visits required, and they apply the same criteria and standards, follow the same procedures and use the same pool of assessors to ensure consistency. These committees cover all institutions whether public or private. Course providers submit one application per programme and there is one process of evaluation and a site visit (Suleiman, 2002). Technical committees make recommendations for decisions by the professional bodies and for the endorsement for programmes of private institutions. NAB makes the final decision. They also provide guidelines for institutions.

171. The development of the Malaysian Qualifications' Framework will bring changes to the way quality assurance is implemented in Malaysia. The MQF is designed to be a unified system of qualifications offered on a national basis by all educational and training institutions including colleges, universities, vocational institutions, professional organisations and other higher educational institutions in both the public and private sector as well as in workplace training and life long learning. Several proposals are being considered, one of which is to separate the standard setting function from the "accreditation" process. There is also the possibility of merging the QAD with LAN to create a single quality assurance body for Malaysian higher education by 2005 (Suleiman, 2002; Ministry of Education 2003). (See http://www.kpm.net-myne.com/qad/nqf.html for more detailed information).

Approach to the Quality Assurance of Distance Learning

172. Under the 1996 PHEI Act distance learning courses are approved and accredited by LAN according to the same standards as other campus-based courses. There are also guidelines and regulations covering the conduct of distance learning programmes. This creates obstacles for certain modes of delivery, especially e-learning. All qualifications offered externally must have corresponding internal courses in Malaysia, and for distance learning conducted in Malaysia there is a provision in the Subsidiary Legislation that students studying through distance learning require at least 20 hours face-to-face with their tutors. Also, if overseas-based distance learning institutions are not licensed by the JPS, then they must have a local private partner, even if they are totally on-line (British Council, 2001).

173. It is expected that new distance learning criteria from the LAN will also require that there is a local learning centre, that all students must have a local tutor and there must be examination procedures to deal with issues such as impersonation (British Council, 2001). In December 2003, the Malaysian Education Minister reported that part-time distance learning and online qualifications at all levels would not be recognised by the PSD due to numerous reports of poor quality teaching and lack of recognition in their home countries. (Studymalaysia.com). Part-time distance learning and online courses must now be recognised under LAN procedures.

United Kingdom

Approach to Quality Assurance

174. The Department for Education and Skills is responsible for all universities. However, all universities are autonomous institutions, particularly in matters relating to courses. The Privy Council is responsible, under the Further and Higher Education Act 1992, for approving the use of the word 'university' (including 'university college') in the title of a higher education institution. Institutions can apply for university status but must satisfy a number of criteria, including the power to award their own first and higher degrees (UUK). The Privy Council does not regulate Non-UK institutions that are legally called universities in their own countries.

175. Most older (pre-1992 Act) universities operate under a Royal Charter, which sets out their overall constitution, and statutes, which provide details as to how the university should operate in practice. The Privy Council is responsible for advising Her Majesty on universities' proposals to amend their charter, and approves amendments to the statutes. Most new (post-1992 Act) universities and certain other higher education institutions operate under an Instrument of Government and Articles of Government. Any amendments to these documents need the approval of the Privy Council

176. In Scotland, older universities operate under Royal Charters, while certain newer higher education institutions have governance documents that are the subject of statutory instruments. The Privy Council approves changes to both types of constitution. The ancient Scottish Universities have Ordinances, which are approved by the Privy Council under the Scottish Universities Acts.

177. The power to award degrees is regulated by law. It is illegal in the UK to purport to award, or offer to award degrees or related qualifications without proper authorisation, either by Royal Charter, Act of Parliament, or by a special order of the DfES. A university must earn the right to call itself by that name and has to meet standards that relate to its size, breadth of studies and experience in educating people to degree level. The Quality Assurance Agency advises Government on the merits of applications for degree awarding powers or university title. All institutions that are recognised by the UK authorities as having degree awarding powers are listed at the DfES web site under the Recognised Bodies Order.

- Recognised bodies – offer degrees by virtue of their own degree awarding powers
- Listed bodies – offer degrees by virtue of the degree awarding powers of another institution (e.g. recognised bodies)

178. Recognised bodies must validate all courses. Foreign based institutions must make it clear that their degrees are not UK qualifications (unless validated), although they can award non-degree qualifications. Foreign universities can offer degrees in the UK as long as they make it clear that they are not offering UK degrees. The UK authorities do not advise on the quality of these courses, and potential students need to check on recognition arrangements in the country of origin for the degree course.

179. Recognition of degree awarding powers allows institutions to accredit higher education courses or programmes provided by organisations that do not have degree-awarding powers. Higher education institutions without their own degree awarding powers usually prepare their students for degrees awarded by a university or university college under a licensing or 'validation' arrangement. Further education colleges normally offer higher education programmes designed and approved directly by a degree awarding institution, under a subcontracting or 'franchise' arrangement. The Open University is one of the largest validating universities in Britain. The Open University's national and international accreditation service, Open University Validation Services (OUVS) was established in 1992 to accredit courses and programmes.

180. Universities and colleges of higher education in the UK are autonomous, self-governing institutions. Each institution has the primary legal responsibility for the standards and quality of its academic awards and programmes. A commitment to quality assurance and the ability to safeguard academic standards is required to be able to award degrees.

181. Each UK college and university has its own internal procedures for attaining appropriate standards and assuring and enhancing the quality of its provision. Institutions are also guided by the QAA in their quality assurance procedures via the academic infrastructure (see below). The main systems used by UK higher education institutions to help assess the quality of their provision are as follows:

- Monitoring how effectively a programme achieves its stated aims and the success of students in attaining the intended learning outcomes.
- Periodic review of whether a programme is achieving its stated aims and intended learning outcomes, and whether these are still valid. It is usually undertaken every five years and involves external experts. Similar reviews occur for student services.
- The appointment of external examiners to provide impartial advice on performance in relation to particular programmes. They are particularly concerned with examining the standard of awards, the comparability of student performance in the UK context, and the assessment, examination and awarding process.

182. In addition, from 2004, all higher education institutions in England will be required to make available information on the institutional context; student admissions, progression and completion; and internal procedures for assuring academic quality and standards.

183. Within higher education, the main agency involved in external quality assurance is the Quality Assurance Agency for Higher Education (QAA), formerly the Higher Education Quality Council (HEQC). The QAA ensures that quality is maintained in all UK university courses and degrees (offered full-time, part-time and by distance). To achieve this QAA reviews standards and quality, and provides reference points that help to define clear and explicit standards. The Agency also publishes reports on most of its review activities.

184. The QAA, together with the higher education sector and other stakeholders, has worked to define clear and explicit standards, for public information and as nationally agreed reference points to guide institutions and quality reviewers. These are known as the academic infrastructure and include:

Programme specifications that are the sets of information that each institution provides about its programmes. These outline the knowledge, understanding, key skills (communication, numeracy, teamwork), cognitive skills (e.g. ability to analyse) and subject-specific skills (e.g. laboratory work) that students are expected to posses on completion of the programme. They also provide details about teaching and learning methods, assessment and subsequent career opportunities, and set out how the programme relates to the qualifications framework. They are also used to assist academic reviewers in understanding the intended outcomes and assessment methods.

Subject benchmark statements have been developed by the QAA to assist institutions in designing and approving programmes of study, and to guide external examiners and academic reviewers in verifying and comparing standards. They were developed by academic specialists and detail the general expectations about the standards for the award of a qualification in a particular subject (e.g. level of intellectual demand and challenge). The statements also describe the defining principles of the subject and the techniques, skills and abilities that are associated with developing understanding in the discipline.

- The National Qualifications Framework (http://www.qaa.ac.uk/crntwork/nqf/ewni2001/ewni2001_textonly.htm) for higher education qualifications is another tool to assist institutions and reviewers in the subject review process. This framework describes the level of knowledge, understanding and skill associated with each qualification. In England, Wales and Northern Ireland there are five qualification levels: three undergraduate (certificate, intermediate, honours) and two postgraduate (masters & doctorate). Students enrolling from the beginning of the 2003-04 academic year are expected to be joining programmes that are in line with the appropriate qualification level. In Scotland there is a wider Scottish Credit and Qualifications Framework that promotes the achievements and attributes represented by the main qualification titles.

- There are ten QAA Codes of Practice (http://www.qaa.ac.uk/public/cop/codesofpractice.htm) for the assurance of academic quality and standards in higher education, which set out guidelines on good practice relating to the management of academic standards and quality. Each section of the code is structured into a series of 'precepts' or rules and accompanying outline guidance on how they may be met. The Code has 10 sections:
    1. Postgraduate research programmes
    2. Collaborative provision
    3. Students with disabilities
    4. External examining
    5. Academic appeals and student complaints on academic matters
    6. Assessment of students
    7. Programme approval, monitoring and review
    8. Career education, information and guidance
    9. Placement learning
    10. Student recruitment and admissions

- Higher education Progress Files are designed to help to make the outcomes, or results, of learning in higher education more explicit and more valuable. They include three elements: the transcript of achievement; personal and development planning; and the students' own personal development records.

185. The QAA is also responsible for reviewing 'academic quality'. This focuses on the quality of the learning process to help students achieve awards (e.g. teaching, support, assessment and learning opportunities). In 2003 Institutional Audit became the means by which academic quality is assessed in England and Northern Ireland. All English higher education institutions will be audited between 2003 and 2005 and, from 2006, audits will take place on a six-year cycle.

186. The Audit process is based on the production of self-evaluation documents; an audit visit; judgements by the team of reviewers; and a published report. Where a judgement of no confidence is given, the institution must also give quarterly progress reports on their action plan. If there are still concerns after 18 months, the Agency can bring forward the next audit.

187. Where practicable the audit process includes consideration of provision offered by institutions in collaboration with other providers, both in the UK and overseas, with reference to the relevant section of the Code of Practice. However, where an institution's collaborative provision is too large or complex for a reliable scrutiny to be undertaken, it is not included in the audit. The QAA plans to conduct separate audits of the way in which such provision is managed by the institutions concerned. The Agency also expects to continue with its programme of audits of specific partnerships between UK institutions and providers overseas.

188. In **Scotland**, institutions are subject to enhancement-led institutional review (ELIR) which is part of an enhancement-led approach to managing quality and standards in Scottish higher education. ELIR was designed by the QAA in collaboration and consultation with Universities Scotland and its member higher education institutions, the student bodies in Scotland and the Scottish Higher Education Funding Council.

189. Institutional review forms part of a wider framework of a new approach to quality assurance in higher education in **Wales**. The Higher Education Funding Council for Wales Quality Working Group developed the framework. Reviews are conducted on a six-year cycle, starting in 2004, and follow a similar process to audits in England.

190. The Research Assessment Exercise (RAE) evaluates the quality of research in universities and colleges and is organised by the national UK funding councils. The RAE is expected to take place every four to six years and is designed to improve the quality of research in universities through linking selective funding to research performance. This process in currently under review.

191. The national education departments have responsibility for the further education sector. The Learning and Skills Council (LSC) is responsible for planning education and training for over 16-year-olds in England other than in universities. The Office for Standards in Education (OFSTED) inspects all state sector 16-19 education in sixth form, tertiary and Further Education colleges (www.ofsted.gov.uk/inspect/post16d.htm) The Adult Learning Inspectorate (ALI) has a remit to inspect all publicly funded work-based training post-16, and post 19 adult learning. It is also responsible for inspecting learning in prisons, all adult and community education, area inspections of provision for 16-19 in support of OFSTED, and e-learning via learndirect (www.ali.gov.uk).

192. Colleges must produce their own annual reports. These have to be available to the public and are published in the media and on the Internet. Some FE colleges have been identified as Beacon Colleges which are given additional funding to support them in sharing good practice; some colleges have been accorded accredited status allowing them to manage their own inspection regime (www.lscdata.gov.uk / www.aoc.co.uk/beacon/)

193. Privately owned colleges must observe a number of health and safety legal requirements, but their educational courses may not be subject to government inspection. There is no UK government legal requirement that independent and/or private and commercial colleges for post-16 education are inspected or accredited; only voluntary schemes exist. However, the British Council only promotes private sector institutions that are accredited by a relevant organisation and have therefore been independently assessed.

194. There are a small number of independent accrediting bodies that operate voluntary schemes of inspection and 'recognition'. Such organisations set standards and then inspect institutions and assess them against these standards. These accrediting bodies do not validate qualifications, they simply inspect institutions. There are three main types of accrediting body, those that accredit English language institutions, those that accredit private or independent colleges, and those that accredit institutions that offer flexible, open and distance learning.

195. The English in Britain Accreditation Scheme (EiBA) is a voluntary scheme that quality assures and accredits organisations in the state and private sectors that offer English as a Foreign Language (EFL) courses at all levels from junior to professional level.

196. The British Accreditation Council for Independent Further and Higher Education (BAC) accredits UK independent higher education and FE colleges that offer education and training to those aged over 16 in any subject area. It does not accredit state colleges or universities nor English language schools and, although some BAC-accredited colleges offer distance learning, those that solely deliver courses by the distance mode tend to seek accreditation through the Open and Distance Learning Quality Council. The BAC also accredits colleges from outside the UK, which offer higher education qualifications in formal partnership with a British university or other body authorised by the Department for Education and Skills. BAC's evaluation does not assess the role of the awarding body itself and does not include an assessment of the curriculum, the assessment procedures used in determining the final grades awarded or the quality management procedures used by the awarding body. Colleges receive a Preliminary Visit, followed by a full inspection visit that assesses a college in 5 areas: Premises and Health and Safety; Administration and Staffing; Management of Quality; Student Welfare; Teaching and Learning: Delivery and Resources. A Report is then prepared for BAC's Accreditation and Recognition Committee, which has the authority to award accreditation. BAC's reports are confidential to the colleges, but colleges themselves are free to make them available to interested parties if they wish. Of the 3,000 'college type' institutions identified in a DfES survey in 1993, only around 350 had chosen such accreditation. The BAC web site lists around 100 such institutions (UUK).

197. Courses that lead to vocational or professional qualifications are subject to accreditation by the relevant vocational or professional organisations (e.g. engineering, accountancy, law, medicine and dentistry). This form of accreditation recognises that a programme provides some, or all, of the competencies needed for professional practice.

Approach to the Quality Assurance of Distance Learning

198. Distance learning offered by UK institutions is covered by the same quality assurance systems as other forms of provision. Where government funds higher and further education courses, they are regularly inspected, follow good practice and are graded (e.g. by the QAA). In addition, the Quality Assurance Agency has published guidelines for the development and provision of distance learning courses that it plans to revise and incorporate into its Codes of Practice under the term 'distributed learning'. This will take account of the overlap between distance and collaborative provision. Some private and independent institutions are accredited by the Open and Distance Quality Council (ODLQC) or the British Learning Association (BLA). Some professional associations require students to complete some recognised training in addition to the educational course before admitting them to their examinations and membership.

199. The QAA's Guidelines on the Quality Assurance of Distance Learning provide advice on assuring the quality and academic standards of higher education programmes of study provided through distance learning. The guidelines do not assume that distance learning is a separate and unique form of higher education around which there are clear, let alone fixed, boundaries. Nor do they assume that all distance learning has uniform characteristics. However, they do take a generic view based on underlying principles or precepts based on a number of approaches which, while not necessarily present in all arrangements, do frequently occur, including:

- **Materials-based learning** – i.e. where learning resource materials made available by the programme provider to students studying at a distance (e.g. printed, audio or audio-visual material, experimental equipment and material on the Internet and other electronic or computer-based resources).
- **Programme components delivered by travelling teachers** – i.e. where staff of the providing institution travelling on a periodic basis to the location of the student to deliver components of the programme.
- **Learning supported locally** – i.e. where the providing institution employs individuals specifically to undertake certain defined functions for the local support of students following the programme.
- **Learning supported from the providing institution remotely from the student** – i.e. where defined support and specified components of teaching provided remotely for individual distant students by a tutor from the providing institution.

200. The guidelines focus on those aspects where the 'distance element' presents a special challenge to the assurance of quality of provision and the security of academic standards of programmes of study and awards. They are arranged in sections under six headings where quality assurance requires particular attention when study is by distance learning:

1. Guideline 1: System design - the development of an integrated approach
2. Guideline 2: The establishment of academic standards and quality in programme design, approval and review procedures
3. Guideline 3: The assurance of quality and standards in the management of programme delivery
4. Guideline 4: Student development and support
5. Guideline 5: Student communication and representation
6. Guideline 6: Student assessment

201. The British Learning Association (BLA) is a cross sector independent forum for advancing techniques and technologies and promoting best practice in learning throughout the education and training sectors of the UK. The BLA's Quality Mark provides a quality assurance system using internal self assessment and external verification of those providing products and services for open and flexible learning. This is based on a framework of criteria adapted from the Business Excellence Model promoted by the British Quality Foundation (BQF) and cross referenced against established Open Learning Guides to be relevant to all aspects of open learning provision and use (Support4Learning). The BLA also has a code of practice for providers produced in conjunction with the Department for Education and Skills in 1997, the National Code of Practice for Open Learning entitled 'Ensuring Quality in Open Learning'.

202. The Online and Distance Quality Council (ODLQC) is an independent body and a registered charity that accredits open and distance learning providers. It is the only organisation in the UK recognised as responsible for the award of accreditation (approval) to institutions offering open and distance education courses. It is recognised by, and liases with, the DfES, the British Council, the BAC, the LSC, the QAA and professional, examination and assessment bodies. Accredited providers can be self-contained organisations, a unit embedded within a larger organisation, one member of a partnership between one or more organisations, or one aspect of a more wide-ranging provision offered by a larger organisation. In the latter case, some standards apply directly to the provision, and some to the parent body.

203. The ODLQC Accreditation process includes a rigorous assessment of a college's administrative and tutorial methods, educational materials and publicity and normally takes between two and six months. If a provider is just developing their open and distance learning provision, they can apply for New Provider Status while they prepare for full accreditation. Providers are evaluated against both their own stated objectives, and the Standards in Open and Distance Learning. Accredited providers pay an annual fee linked to turnover, and can use the ODL QC Quality Mark to show their achievement. They are monitored to ensure that students continue to receive good service, and are re-assessed at least once every three years. The ODL QC Guarantee covers learners with ODL QC Accredited Providers so that if they receive a poor service, or have a dispute, ODL QC will look into the case. Accredited Organisations must meet the Council's published Standards.

E. Quality assurance and the import and export of higher education

Jordan

Position in relation to Trade in Educational Services

204. In addition to distance learning, there are also a limited number of partnerships between Jordanian institutions and overseas universities. As private institutions are accredited and can offer their own qualifications, partnerships are only required for prestige, or where there is limited or no expertise in the subject area. This type of provision often overlaps with distance learning provision because, at present, courses cannot solely be offered by distance methods.

205. The main types of transnational education operating in Jordan are as follows:

- Full franchises
- Part franchises
- Local delivery of courses by overseas staff
- Jordanian students studying abroad
- Foreign students studying in Jordan

206. In terms of GATS, the UNESCO regional office notes variable positions in the Arab world, and that higher education authorities were absent from GATS negotiations. Only some states (e.g. Egypt, Oman) give a legal basis for operation to transnational providers, and many states operate without a legal and regulatory framework that takes account of transnational provision, which can lead to low quality provision (e.g. in Lebanon) (UNESCO Regional Office for Education in the Arab States, 2002).

207. As part of its restructuring of the higher education system, the Jordanian government is seeking to attract more overseas students, mainly from surrounding Arab countries. There is currently a quota that states that foreign students should represent 10 percent of the total number of students admitted to Jordanian universities (British Council, 2000).

Quality Assurance arrangements

208. For all foreign providers, whatever the mode of delivery, the current position on licensing and accreditation of their course (as described by the British Council in 2001) is as follows:

- Any Jordanian partner must be licensed.
- If there is no Jordanian partner, the provider must be accredited (or equivalent) in its home country.
- If a Jordanian public university is used as a partner, a Memorandum of Understanding is required between the 2 institutions. Approval is not required for the partnership, course, or any award.
- If the Jordanian partner is a private university, the course must be submitted for accreditation by the Higher Education Council. This rules out distance learning as a delivery option.

209. UNESCO's Regional Office has generated a rough typology of Arab States according to their attitudes towards the regulation and accreditation of new private and transnational providers. The States that have done little to encourage new providers (e.g. Algeria, Iraq, and Morocco) are described as 'impervious'; those who have cautiously embraced them (e.g. Saudi Arabia, Egypt, and the UAE) are termed 'prudent'. Jordan (with the Lebanon, and the Yemen) is described as 'venturesome' since the country has a large number of new independent institutions with 'weak' regulatory frameworks for quality control and implementing regulation (UNESCO Regional Office for Education in the Arab States, 2002).

210. In July 2001 the Higher Education Council amended the academic affiliation system with overseas universities, so that Jordanians must study for at least a year abroad when registering with a foreign provider. Many Jordanian students enrol in institutions overseas (e.g. in Syria, Sudan) as the costs are lower and entry qualifications are less stringent, although some complete their studies in Jordan rather than in the host country. Overseas universities set up affiliated offices in Jordan that effectively act as brokers for these courses. This decision has reduced demand for affiliated courses from students (Khader, 2002b).

Local factors

211. Higher education in Jordan is characterised by a complex hierarchy of institutions based on ownership and proximity to Amman. At present private institutions are viewed as less prestigious than public universities in Jordan, although private institutions are accredited and offer their own qualifications (British Council, 2001 and 2003).

212. The British Council suggests that the past history of distance learning in Jordan has been associated with poor quality or fraudulent education and insecure examination systems. In Jordan, distance courses are seen as of questionable quality offered by overseas providers. The current lack of accreditation for distance based courses merely confirms the public's perceptions on quality (British Council, 2001).

213. Local provision of distance learning in Jordan is also limited due to negative perceptions of the delivery mode. This mainly due to the limited amount of face-to-face contact, which is seen as important in the learning process (British Council, 2001).

214. The Jordanian market for trans-national education is price-sensitive and expensive programmes do not generate sufficient demand. Jordanians seeking foreign education are generally knowledgeable about the different education systems and students and their families seek the best quality available at the lowest comparable prices (British Council, 2000). The popularity of trans-national education, and particularly franchised courses, depends on the economic situation. There is a view that franchised courses are not good value for money, as Jordanian parents may as well send students abroad for the entire course (British Council, 2001). In addition, Jordanian culture is protective of children and parents seek to keep them at home as long as possible.

Kenya

Position in relation to Trade in Educational Services

215. Kenya hosts twinning and collaborative trans-national provision, as well as overseas students. Kenyan students also study overseas.

216. UNESCO reports that the concept of trade in higher education is beginning to emerge in Kenya. This is being reflected in government policy at a range of levels, including regarding GATS (Njine, 2002). Njine reports that the Kenyan government regards higher education, adult education and other forms of tertiary education as trade. This has implications for trade agreements with a range of countries for regulation purposes (including the UK, India and China) on issues such as recognition of qualifications, and students studying abroad.

217. The Kenyan government intends to amend the Universities Act to make it easier for foreign and other new providers to operate in Kenya. Kenya has made requests for the export of educational services to a number of countries in Asia, Africa and Europe under the GATS discussions, primarily to allow Kenyan teachers to teach there and to establish educational services in partnership with local institutions (Njine, 2002).

218. In addition, the government is keen to support the establishment of overseas branch campuses in Kenya. CHE hopes that such campuses will improve the opportunities for Kenyan students to obtain university education and will reduce the necessity and cost of studying overseas. By 2001, CHE reported that 4 institutions had enquired about setting up overseas campuses in Kenya (CHE, 2001).

Quality Assurance arrangements

219. International providers are protected by the Investment Protection Act, so that their property cannot be expropriated by the state and they can repatriate their profits. However, this could conflict with the Universities Act, which recognises universities as corporate bodies with perpetual succession. The Act does not envisage universities closing down to repatriate capital (Njine, 2002).

220. Overseas providers require accreditation from CHE, even if they wish to retain accreditation in their home country (e.g. US International University is accredited at home and in Kenya). This can lead to conflicts if standards of accreditation and quality control are different (Njine, 2002). CHE is currently preparing legislation related to the establishment of branch campuses of overseas institutions in Kenya.

221. The CHE aims to ensure that education in Kenya is relevant to the country's needs. However, many overseas providers expect to use curricula that is the same as in their home country, which may not be relevant to the Kenyan context.

Local factors

222. 'New' or private non-university providers in Kenya are seen as more flexible in their curricula than public institutions and thus more able to meet the needs of the economy, for example in computer studies and travel and tourism which are growth industries in Kenya. In addition the 'new' providers are perceived to make more efficient use of resources (e.g. ICT) than traditional institutions (Njine, 2002). However, there are concerns that the private sector is over-reliant on student fees and that they are spending money on improving transport infrastructure (as they are often located outside urban areas) rather than on academic programmes (Kihara, 2003b).

223. As the fees are high in the private/transnational sector, it is only the upper and middle classes that are able to afford to study in these institutions. As these new providers benefit from the country's infrastructure, so there are concerns regarding their impact on social justice (Njine, 2002). In addition, many richer students obtain loans through HELB in the less expensive public universities. This can have the effect of widening inequality in higher education. (Otieno, 2003).

224. There are concerns about quality control amongst some private providers in Kenya, which advertise courses without receiving the necessary accreditation. There are suspicions that many institutions often award certificates and diplomas shortly after opening rather than waiting for accreditation by the public universities or the KNEC, and that they award qualifications after only a few weeks of training. Some providers also offer courses in association with overseas providers of dubious credibility (Abagi, 2003). Private providers are also seen to be seeking to maximise profits through employing lower paid, less qualified staff and providing limited resources for study and contact with teachers (Njine, 2002). There is a perception that the government is over-stretched and unable to regulate these providers effectively, perhaps because the procedures are too bureaucratic and it can take a long time (up to 3 years) for CHE to approve courses (Kihara, 2003b).

225. Transnational providers also face accusations on the negative contribution of their courses to economic relevance and equity concerns in Kenya. For example, government authorities expect educational provision to be relevant to the country's needs. However, Njine reports that the curricula from transnational providers is based on home country requirements rather than Kenyan needs (Njine, 2002).

Australia

Position in relation to trade in educational services

226. In the 1980's the potential export revenue from education was an integral part of the wider Australian policy context that promoted economic diversification and private investment. Since the public sector universities were unable to charge fees to most local undergraduate students, international students became a vital source of revenue. A key policy objective in recent years has been to sustain and increase the flow of net revenues from foreign students through promotion of the export market. The government also seeks to promote the non-financial benefits of international education as a means to encourage the cross-border mobility of people and ideas through collaborations and exchange. This helps to develop the quality and prestige of the local system and drive the innovation and knowledge industries (Burn, 2000). In addition, there are spin-offs for business, industry and political relationships between Australia and the source countries once students return home.

227. The Government has provided incentives for the international marketing of courses and has supported attempts to co-ordinate the marketing activities of Australian universities overseas through establishing highly effective Australian Education Centres in Australian Embassies and hosting education fairs. The 2003 government reform package highlighted proposals to provide funds for promoting international education in new and emerging markets, subsidising off-shore enrolment by domestic students financed by increased visa charges (opposed by universities) and extending AUQA institutional audits to off-shore operations (Marginson, 2003). In addition, IDP Australia provides research and information to support the international student industry.

228. Since the 1980s international education has grown to such an extent that universities have specialist international departments that cover all aspects of such provision (e.g. marketing, student orientation and sup-

port, enrolment, etc.), some of which are run as businesses. In 2001 Australia generated $2.145 million from education export, 13.1% of all services exports (OECD 2003 - in Marginson and McBurnie, 2003) and $0.756 billion from foreign students in tuition revenues (DEST, 2003). A net $107.1 million was obtained in revenues for distance/on-line and off-shore provided education. IDP Australia suggest that today the international education export market is worth AUD4bn a year to Australia (Illing, 2003a). Others estimate that it could be worth as much as AUD5b (Marginson and McBurnie, 2003).

229. Australia has been highly successful in attracting overseas students to study on Australian courses. More than 150,000 students from overseas attend education institutions in Australia each year (Breen, 2002), and Australia currently has 10% of the international market for overseas students. Australian universities benefit from highly effective marketing, the low costs of study and cost of living (compared to its key competitors, the USA and the UK), its location near Asia (expected to represent 70% of demand by 2025 – compared to 43% today – mainly from China and India), and its reputation as a relatively low risk environment. In addition studies of student choice suggest that Australia is seen by students as a low cost high standard substitute for the UK and the USA in Business and ICT related subjects (Marginson and McBurnie, 2003).

230. In 2001, foreign students represented 13.9% of all students, the second highest proportion in the OECD after Switzerland. IDP Australia (2002) reports that this rises to 18% when foreign campuses, transnational and distance education are included (Marginson and McBurnie, 2003). This also rises in some faculties to half when subject is taken into account (Breen, 2002).

231. Based upon a survey of providers IDP describes a typical Australian TNE program as postgraduate (56%); in Business, Administration and Economics (51%); located in Hong Kong, Malaysia or Singapore (72%) and with an average enrolment of 40 students. In addition, around half of TNE students (54%) are enrolled in full-time study. The main delivery modes are face-to-face teaching (40%) and supported distance education (40%) (Marginson and McBurnie (2003) reporting Davis, et al., 2000).

232. In relation to trade in educational services, Australia is both keen to secure free access to foreign markets, but also seeks to protect its domestic system from unlimited and low quality foreign competition. The export industry is regulated lightly through economic incentives, visa regulations and negotiated country-to-country agreements, supported by the national quality assurance system (which extends to international students and TNE). However, the government protects local institutions through providing subsidies to local institutions only. In addition, the quality of the higher education is ensured through restricting the use of the title 'university' and subjecting the accreditation of private providers and courses to quality audit (Marginson and McBurnie, 2003). The main policy instruments that affect trade in cross-border education, are formal trade agreements (regional and bilateral), and membership of multilateral economic bodies (e.g. the WTO).

233. Under the GATS negotiations, Australia's Negotiating Proposal for Education Services (submitted to the WTO) said that it 'sees the liberalisation of trade in education services as the most effective way of encouraging the internationalisation of education and enhancing flows of students between countries'. This proposal was influenced by the findings of a 2000 APEC study 'Measures affecting trade and investment in education services in the Asia-Pacific region' (Marginson and McBurnie (2003) reporting WTO, 2001a).

234. Australia's proposal lists a range of barriers to trade, including visa requirements, foreign exchange requirements, qualification recognition, restrictions on ownership and foreign equity, lack of regulatory transparency, employment restrictions, and import restrictions on educational materials. However, Australia also states that governments must 'retain their sovereign right to determine their own domestic funding and regulatory policies/measures' (Marginson and McBurnie (2003) reporting WTO, 2001a).

235. During GATS negotiations in late 2002, Norway convened an Education Alliance to explore issues arising from the treatment of education as a tradable service. Members include Norway, Australia, New Zealand, South Africa, Japan, India, Uruguay, Argentina, Chile, Thailand, Peoples Republic of China, Egypt, Senegal, Turkey, Jordan, Kenya and Mexico. The group combines net importers and net exporters, with a range of attitudes toward trade liberalisation, but has a mutual interest in addressing issues of the public good, quality assurance and consumer protection (Marginson and McBurnie (2003) reporting Gallagher, 2002; Stevens, 2003).

Quality Assurance arrangements

236. The provision of education and training services to overseas students in Australia is regulated by the Commonwealth Department of Education, Science and Training (DEST) through the Education Services for Overseas Students (ESOS) Act and associated legislation. The ESOS Act requires that providers of education and training to overseas students must be registered on the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS). Only registered providers are permitted to offer education or training services to overseas students. CRICOS provides a national listing of all providers registered to offer courses to people studying in Australia on student visas, as well as the courses that these providers are registered to offer. The appropriate State or Territory education authority must approve both the providers intending to offer courses to overseas students and the courses that they offer.

237. The ESOS Act and its National Code provide nationally consistent standards for registration and the subsequent conduct of CRICOS-registered providers. The Code provides legally enforceable and nationally consistent standards for providers registered to offer courses to overseas students in Australia. (UNESCO, 2002; DEST, 2003). The purpose of the legislation is to protect the interests of people coming to Australia on student visas by providing a nationally consistent approach to provider registration. It requires that providers: meet quality assurance standards; comply with tuition and financial assurance requirements; and encourage overseas students recruited to study in Australia to comply with the conditions of their visas, and report those who do not. Breaches of the Act and the Code can lead to the imposition of sanctions, including their suspension or cancellation from CRICOS (UNESCO, 2002; DEST, 2003).

238. In relation to the regulation of Australian provision overseas, Ziguras (2002) reports that historically Australian transnational education has been less regulated than that of its competitors. New Zealand and the UK applied their quality assurance systems to transnational provision and several regional US accreditation boards examine universities TNE activities. Ziguras suggests that the limited regulation may have contributed to its commercial success, but highlights the possibility of declining standards in an increasingly competitive global marketplace. Potential problems include institutions using low entry criteria, allowing shortened study times, and offering degree or master's level courses when they are not authorised to in Australia. There are also international concerns over franchised courses. Particular concerns include operations where local providers market courses using credentials from an established overseas university whilst providing poor quality education.

239. Importing governments often implement legislation and enforce registration and review requirements for overseas operators, although this is not always the case. In addition, external bodies such as professional associations and the International Standards Organisation (ISO) also conduct reviews.

240. Recent IDP research suggests that quality is the most important determinant (followed by employment prospects and price) on choice of location for international study and there is a fear that Australia is vulnerable to shifts in perception about the quality of its courses. IDP's Lindy Hyam has suggested that the consumers of TNE are increasingly demanding 'international quality assurance' and the battle is on to decide which model will win through (Illing, 2003a). As a consequence, the Australian government has been keen to tighten its control of the international education export market and address any doubts within importing countries about the quality of Australian offshore provision. It has already set up audits of Australian TNE programmes overseas via the AUQA. These audits examine the institution's relevant QA processes, inspect sample contracts and reports, and speak to relevant people (staff and students) in Australia and overseas. Contacts are usually made by conference or teleconference, although some site visits are made.

241. In June 2003, the Federal government announced plans for audits for Australian higher education activity off-shore on a 'whole-of-country' basis. It has earmarked AU$590,000 per year to conduct such audits for a nominated country each year, with Malaysia planned to be the first country audited. The AUQA is supportive, but worried about the potential overlap between 'country' and 'institutional' audits, and which criteria would be used for the former, since audits are generally take place related to institutional objectives.

242. Protocol 2 of the March 2000 'National Protocols for Higher Education Approval Processes' sets out the requirements for foreign providers wishing to establish in Australia. Foreign providers must:

- Be a legally-established bona fide institution in their home country
- Meet accreditation requirements of appropriate authorities in their home country. If they are not considered appropriate, State/Territory accreditation bodies may require the proposed courses to be subject to a full accreditation process.
- Have academic standards and learning outcomes comparable to Australian institutions
- Have delivery arrangements including academic oversight and quality assurance comparable to those offered by accredited Australian providers
- Have appropriate financial and other arrangements to ensure successful delivery of courses

243. The state accreditation agencies are responsible for dealing with applications. These are reviewed by an independent expert panel, which examines documentation, inspects facilities and interviews students and staff. Approved institutions are listed on the Australian Qualifications Framework register of bodies authorised to award qualifications. These protocols have yet to be substantially tested by foreign applicants (Marginson and McBurnie, 2003; McBurnie, and Ziguras, 2001).

Local factors

244. Gamage (2000) reports that the university community is opposed to funding cuts and that there has been increasing number of industrial disputes in the sector. Tierney and McInnis (2001) report the findings from surveys and interviews with academic staff which describe concerns with their increased teaching load and falling staff-student ratios (SSRs) (from 1:12 in 1980 to 1:19 in 2001) which has contributed to rising stress levels. There is also increasing pressure on staff to generate revenue whilst also improving quality and maintaining their research capacity.

245. The universities themselves are seeking greater fee flexibility in order help ease their financial crises and recent government proposals are designed to promote a viable fee-based market in public sector undergraduate courses. Marginson (2003) suggests that, if adopted, these proposals will result in a system whereby the most prestigious public universities and high-return programmes (e.g. Law and Medicine) will have high fees enabling institutions to reinvest in research and reduce their dependency on international students. This will increase differentiation between institutions and the private sector is also likely to grow.

246. Perceptions about the quality of higher education in Australia are linked to the current issues with funding that are described above. Although the share of GDP for higher education is increasing, the share of public funds is decreasing, as is the spending per student. There are debates about whether increasing SSRs and teaching workloads affected quality standards.

247. Marginson and McBurnie (2003) report that the potential cultural and academic benefits of mixing international and local students are not always fully realised. Also there is low mobility of Australian students. In addition, concerns regarding 'Brain drain' of key workers also affects Australia, which is why it offers IT professionals preferential visa treatment. University staff are also working abroad due to concerns with salaries and working conditions in Australia following recent budget cuts and structural reforms.

248. Marginson and McBurnie (2003) suggest that there are tensions between universities and government regarding how immigration policy issues interact with education policy. For example, changes to immigration policy to try to address the issue of fraud (e.g. using student visas to gain employment) will impact on the recruitment of overseas students. They also suggest that there is a long way to go in co-ordinating quality assurance in the Asia-Pacific region and that it is a concern for exporting and importing nations, as well as for providers. Importers need to protect students, and exporting countries and providers need to maintain market their credibility and academic integrity.

Malaysia

Position in relation to trade in education

249. McBurnie and Ziguras (2001) describe Southeast Asia as 'a laboratory in the development and regulation of trans-national provision' (p.88). Trans-national provision in Malaysia has grown rapidly since the liberalisation of higher education in 1996. There is now a variety of types of trans-national provision with a varied terminology to match, some of which is dependent on the type of provider the institution is working with. Arrangements include twinning, franchising, and credit transfer programmes. There is also a variety of modes of study: part-time, full-time, intensive, on-campus, off-campus, formal, informal etc. In addition, Malaysia has 5 colleges/universities with branches overseas (e.g., INTI College has a presence in China, Vietnam, Thailand and Indonesia) in addition to the distance learning activities of UNITAR.

250. Malaysian students can also register as 'external' students with a foreign or local university and study through the local private colleges. This form of study is similar to a split-site arrangement but without the same level of teaching or any formal linkage between the local Private HEIs and the overseas universities. This mode most closely resembles distance learning. The syllabi, entry requirements and examinations are all determined and conducted by the responsible university, whist the private colleges offer tutorials and administrative support to students and prepare students for the final examinations. Examinations are held at designated or approved centres, usually a private college, and only authorised examination bodies are allowed to supervise the examinations. The degree is the same as that received by internal students of the university. For example, the University of London (UK) offers external programmes in Economics, Management, Law, Finance, Banking and Information Systems. The UK University is responsible for admission policies, curriculum development, assessment procedures, marketing, examination timetable, etc. Application, Registration and Examination fees (studymalaysia.com, 2002). Camphell University (USA) offers courses in Chemistry and Biology, Computer Science, Information Systems and Microelectronics.

251. The Malaysian government has historically welcomed international input and transnational provision in the national education system since it brings with it international quality standards and expertise, and promotes mobility of staff, students and professionals. However, there is some unofficial Malaysian concern that local private education with strong international links could create a two-tier system to the disadvantage of state education (GETIS, 2000).

252. The UK, the US, and more recently Australia, Japan and Germany are actively involved in the transfer of skills and technology to Malaysian institutions, both public and private. However, the long-term aim of this involvement from the Malaysian government's perspective is to develop and expand Malaysia's capacity to meet its educational and skills needs through its own institutions.

253. The 7th Malaysia Plan sought to reduce the number of students sent overseas for undergraduate study at the Government's expense, so as to prevent capital from moving abroad as the country sought to develop its indigenous provision, either through local private and public institutions or through partnerships. The latter reduces outflow of revenue, and builds the experience of local providers (GETIS, 2000). The World Bank reports that Malaysia is hoping to attract 50,000 overseas students by 2010 (generating RM3 billion annually) and establish itself as a regional education hub (World Bank 2003). According to a recent study commissioned by the National Economic Action Council in Malaysia, higher education costs in Malaysia are 30% lower than in Singapore, which could attract students from China, Indonesia and the Gulf States. Since 1998 Malaysia has been seeking to become a major exporter of educational services in the ASEAN region and regularly organises education fairs to promote Malaysian Education abroad.

254. The Ministry of Education's current policy on transnational tertiary education is focused on the following themes:

- Medium of instruction
- Procedure of approval of student visas
- Policy on 3+0 courses
- Encouraging top international universities to open branch campuses in Malaysia
- Exchange of teaching staff
- Exchange of research and development

255. As yet, there has been little discussion regarding the implications of GATS for higher education in Malaysia. Malaysia is a member of the WTO, but as of 2001 it had not made an offer on educational services, although it is perceived to comply with the national treatment principle that there should be no substantial distinction in legislation between local and private providers. The Ministry of International Trade and Industry handles all trade negotiations, in consultation with the Ministry of Education. There are workshops and discussions with relevant departments and associations representing private institutions are consulted and participate in events.

Quality Assurance arrangements

256. In Malaysia all transnational providers are subject to national laws and the national quality assurance framework. There are two main options for foreign providers wanting to offer courses in Malaysia, they can either:

1. Apply to be licensed as a private HEI (i.e. open a branch campus)
2. Deliver courses through a local partner licensed as a private HEI

257. All transnational private providers with a local presence must meet the government requirement that home nationals must hold 30% of the equity, and they must also fulfil local registration requirements (Suleiman, 2002).

258. Courses from overseas providers leading to professional qualifications must meet requirements of professional licensing bodies, in the same way as local providers. They must also be accredited in their home country.

259. For franchised courses the Private Higher Education Institution Act states that the curriculum should be exactly the same as the home-campus version. (There could be a conflict with this and other requirements for minimum contact hours for example when the course is not offered by the distance mode in the home country). Both local private colleges and their partner universities must also submit annual reports on the progress of the 3+0 programmes. The reports provide details on the academic progress of students, staff development and student exchanges.

260. The UK Quality Assurance Agency (QAA) conducts regular audits of twinned degree programmes leading to UK qualifications and in 1999 published its audit of engineering degree courses. The National Accreditation Board (LAN) also considers the status of partner organisations in their home country with relevant quality agencies (e.g. QAA in UK), particularly regarding their overseas activities. Since Australia's quality agency was established, it has stated that it plans to visit and accredit franchised courses delivered by Australian providers overseas (Illing 2003).

261. LAN is working with The Higher Education Department in the Ministry of Education on criteria for the assessment and quality assurances of qualifications. The intention is to make available different pathways towards qualifications in the Malaysian Qualifications Framework (MQF).

Local Factors

262. Malaysia has a major education business that is growing year on year as supply struggles to cope with demand. There are networks of commercial educational agents in most towns that actively promote colleges and there is a regular publication "Education Quarterly" which reviews different aspects of the local education scene (GETIS, 2000). Although Malaysia is aiming at a rapid development of its domestic capacity to award academic and professional qualifications, overseas study has been so prevalent that local qualifications can often be viewed as "second best" (GETIS, 2000).

263. The World Bank reports intense competition between private higher education institutions that has improved quality and choice. This, combined with the growth in English language instruction has created a vibrant and growing private education sector, that is attracting fee-paying foreign students, from China and Indonesia for example (World Bank, 2003). However, there are concerns about the number and quality of academics in these institutions, many of whom also work in public universities full-time, and some only have a first degree qualification (Lee, 2001).

264. 'Quality' in higher education has historically been associated with the reputation of the course provider in respect of students' academic achievements, and also to academic affiliation with the world-renowned universities (GETIS, 2000). Suleiman (2002) notes, in addition, that accredited courses provide added value to students and providers since:

- Qualifications are generally endorsed by the Public Services Department
- They help to secure employment opportunities
- They improve access to sponsorship
- They improve credit transfer
- They assist with acceptance to enter public institutions.

265. However, Lee notes that a lack of resources prevents the Ministry from effectively monitoring and enforcing its rules and regulations related to private higher education, and that approval accreditation is often a slow process (Lee 1998, 2001). There are also concerns about the variability in quality in the private sector. Many private colleges have insufficient resources, facilities, teaching staff and student support systems to provide quality education.

266. In the public sector, a different ethos applies; where in the private sector quality is 'policed', in the public sector there is a principle that quality assurance is a self-directed evaluation aimed at quality enhancement and a professionally motivated activity. There are also quality units in all public universities.

267. The public perception of distance learning is often that it is 'second chance, second best' education for weaker students, whose completion and success rates are often low. The pedagogical quality of these courses is also questioned, since they involve limited face-to-face contact with teachers, and student support services (Marimuthu et. al., 1998). This perception is not helped by the fact that distance learning courses are not recognised by some professional bodies and some employers. Employers tend to be more sceptical of degrees obtained by the distance route, and offer graduates lower starting salaries (Lee, 2001). Only well established qualifications have local standing in relation to recognition and employment (GETIS, 2000).

268. Although there are a range of transnational providers in Malaysia offering foreign degrees and expertise, there is still a cultural preference by parents for education overseas, especially since the well regarded local public institutions are unable to meet demand. Overseas universities have prestige and are thought to offer better quality education than local private universities, especially in technological and business-orientated subjects (GETIS, 2000).

269. Originally, little distinction was made between a foreign qualification obtained locally and ones obtained through overseas study. However, there is some evidence that this perception may be changing as more students take a local study option and quality differences emerge between overseas study in older well-established universities and overseas qualifications offered locally in co-operation with Malaysian partners. This has started to erode perceptions of quality and standards in overseas institutions and of the newer private institutions (GETIS, 2000). Thus, the Malaysian government and students and employers and beginning to differentiate between institutions and individual courses when assessing the quality of transnational provision.

270. At present the reputation of the degrees offered in Malaysia depends on the standing of the local college and its twinning partner. However, the quality assurance of the locally delivered component is becoming a major concern, especially where systems of credit transfer for locally taught and examined modules are not transparent. The Government is also reluctant to recognise degrees from colleges that have historically been pre-university institutions, even when twinned with reputable overseas institutions (GETIS, 2000).

271. Trans-national programmes are very popular among Malaysian and foreign students alike, especially programmes on management, commerce, economics and accountancy. These courses contain content taught in English that is largely based on Western traditions in each subject. There are concerns that this may have an impact on the preservation and development of national identity. In addition, many TNE (and private) students are also non-Bumiputera, so such influences are not evenly spread throughout the population, which may damage social cohesion (Lee 2001). A public/private divide may be emerging in terms of students' experiences of higher education.

272. The 1996 PHEI Act had three key concerns regarding transnational provision (see Refs. in McBurnie and Ziguras, 2001, p.94), which led to the increased regulation of the sector:

- That the use of English may exacerbate social divisions
- That the curriculum of foreign providers may not meet the needs of the national economy
- That the vocational focus of private education may affect the need for graduates with high moral and ethical values.

273. In a recent report, Suleiman states that the lack of specific accreditation for trans-national providers has to some extent mitigated against the commercialisation of education in Malaysia, by subjecting overseas providers to the same quality controls as local institutions. However, he notes some other key challenges to the national system created by the commercialisation in the higher education sector (Suleiman, 2002):

- Potential weakening of the national education system
- Concerns about intellectual property
- Insensitivity to cultural issues
- Concerns about academic quality
- Concerns about recognition of qualifications.

274. Lee suggests that Malaysia has had to compromise its nationalistic policies in the face of globalisation and the realities of importing Western curricula and the need to offer courses that are attractive to overseas students who seek globally relevant qualifications and training. She says:

275. "Malaysia has found itself in a double bind by being a key player in the internationalisation of higher education. As a consumer of transnational education, Malaysia has attempted to indigenise the international curricula, but as a provider, it has to sacrifice some of its nationalistic sentiments by incorporating more universalistic elements in its educational programmes to suit the needs of the global economy, and at the same time be more sensitive to the cultural context of its foreign clients" (Lee 2001).

United Kingdom

Position in relation to trade in educational services

276. The UK was the first country in Europe to promote higher education from an export and trade perspective, with clear objectives regarding the recruitment of international fee-paying students. In 2001 the UK had around 14% of the market share of international students. International students study at all levels in all types of course including school education, English language teaching, short vocational courses, professional courses, undergraduate and postgraduate degrees.

277. In addition to distance learning, franchised and validated courses operate through partnerships between institutions, generally one institution that offers recognised degrees and another that does not. These types of arrangement include (British Council, 2002):

- **Franchised courses** – A course designed by one UK institution, which can award qualifications, but taught by another (e.g. in another country). The syllabus and, usually, the teaching materials will be the same as those in the awarding institution.
- **Validated courses** – A qualification from one institution is awarded on the basis of the students' work on a course designed and taught by another institution. The course is not usually offered by the awarding institution.
- **Split/joint courses** – partnership between two institutions where teaching or the course is split between two locations (often called 3+1,2+2, etc). Students would spend part of the course at the partner institution.

278. The overseas delivery of education and training by distance learning, franchising and licensing arrangements is a major and growing market for the UK. Figures for this sector are unavailable at present, but estimates suggest that over 200,000 overseas-based students follow UK-based programmes (British Council, 2001). Around 2 million UK professional qualifications and examinations are taken overseas each year and this is growing at 10% per annum (British Council, 2001).

279. The Prime Minister's Initiative was launched in June 1999 with a focus on increasing the market share of the overseas student market (studying in the UK) and assisting universities to enter the cross-border and e-learning markets. The initiative initially focused on developing a UK education brand, a global marketing strategy and a 3-year promotion campaign for UK education and training, expanding a national scholarship scheme, making visa restrictions more 'user friendly' for students and easing restrictions on international students working in the UK (British Council, 2001). The target was to increase the UK's share of international students among the four leading English-speaking countries (US, UK, Australia and Canada) from 17-25% by 2005 (from the base year of 1996/7). In addition, the Initiative also set a target for increasing international student numbers by 50,000 in higher education and by 25,000 in Further Education by 2005, from the same base year. For the academic year 1999/2000, non-EU enrolment in higher education increased by approximately 10,000. Overall, the UK educates around 400,000 overseas students.

280. Institutions in the UK are also involved in delivering programmes offered by consortia, either traditional public universities alone (such as the Worldwide University Network – a consortium of 13 research-led universities in the UK, USA and China), or a mix of public universities and companies (such as Universitas Global) (van de Wende and Middlehurst, 2004).

281. The higher education sector in the UK has worked with the Department for Education and Skills and the Department for Trade and Industry to prepare the UK's position in relation to GATS. However, formally, it is the European Union that negotiates with the WTO. The European position, as of March 2003, is currently not to include higher education in its initial GATS submission. One of the leading UK staff associations, the AUT, together with the employer's representative Universities UK is opposed to including HE within GATS and they believe that it will lead to detrimental effects in public funding, employment conditions, professional autonomy, quality, academic freedom, Intellectual Property Rights (IPR), and student access. The DfES has stated that it will not make any GATS commitments that would call into question the UK arrangements for the public funding and regulation of education services.

Quality Assurance arrangements

282. When an institution has collaborative provision (programmes offered with other institutions, in the UK and overseas that lead to the award of degrees from UK institutions) this is expected to be included in the institutional audit carried out by the UK QAA. If an institution's collaborative provision is too large or complex to ensure reliable scrutiny in the normal time-scale of an audit, a separate audit is undertaken. This process of overseas audit assesses how effectively the UK institution manages both the maintenance of the standards of its awards made in respect of overseas programmes and the quality of those programmes. This initiative is intended to improve confidence in the work of UK universities and colleges operating overseas. However, importing countries themselves and international students are required to be vigilant about non-registered providers offering degree courses in partnership with their local institutions.

283. To help assess the quality of collaborative provision the QAA has a developed a Code of Practice for the assurance of academic quality and standards in higher education: Collaborative provision. This Code is one of the 10 Codes in the UK academic standards infrastructure. The Code takes account of the experience of institutions that have been involved with collaborative arrangements. The Code expects that arrangements for assuring quality and standards should be as rigorous, secure and open to scrutiny as those for programmes provided wholly within the responsibility of a single institution. This remains the case even when a partner organisation is itself also an Awarding Institution, as with joint or dual awards, although there is flexibility when the arrangement involves two or more UK Awarding Institutions.

284. In cases where the award is the subject of a collaborative arrangement with another agent, other than the awarding institution, and/or is granted under licence, such as for some professional or statutory bodies, it is viewed by the QAA as good practice to apply the provisions in the Code. However, the QAA believes that adherence to the precepts of this Code cannot be demonstrated where 'serial franchising' takes place, (i.e. where an institution franchises provision to, or validates the provision of, another, which in turn franchises the provision elsewhere). There is an expectation that the holder of an award from a UK institution will have been taught and assessed in the English language, unless the subject of the degree is such that it is obvious that all or part of the teaching and assessment would have been in another language. Awarding institutions are advised to be cautious about entering into arrangements whereby assessments will be in a language other than English.

285. In addition, The British Council Educational Counselling Services' (ECS) Code of Professional Standards and Ethics for member Institutions (related to overseas' marketing) aims to protect the UK's reputation in higher education. Through the application of this Code, the Council also seeks to promote the profile of the UK in terms of its quality assurance arrangements and to assist individual higher education institutions to market themselves appropriately (van de Wende and Middlehurst, 2004).

286. Overseas universities and other higher education institutions can operate in the UK and offer their own qualifications, so long as they do not claim to offer a UK degree. If they do make this claim, and are not a registered or validated provider of UK degrees (regulated by the 1988 Education Reform Act) they can be prosecuted under trade descriptions legislation.

Local factors

287. British universities have strong international reputations, particularly the older and internationally known institutions (e.g. Oxford, Cambridge, and London). However, in recent years a number of other institutions (e.g. Warwick, Durham, York) are challenging the established institutions in terms of their ranking in league tables relating to teaching and research. While formally, the Quality Assurance Agency aims to ensure that all undergraduate degrees in the UK are broadly comparable, public perceptions (as judged by student, parental and employer choices) often suggest that a differentiated system is in operation. Recent Government and Funding Council policy in England is also in practice seeking to create a more differentiated system (DfES, 2003) as well as one that is more balanced in terms of income from state and non-state sources including higher levels of fee income. Funding pressures on institutions typically also raise concerns about quality.

288. While there are criticisms of the UK's quality assurance system locally, particularly in England (in relation to its complexity, cost and burden (Brown, 2000), overseas' governments appear to rely on the QAA to ensure that education exported from the UK is reaching appropriate standards and levels of quality. In addition, some of the 'academic infrastructure' pioneered by the QAA and its predecessor bodies is being adopted and re-shaped by other countries as a means of creating a common language and improved understanding between countries and agencies as transnational higher education expands (Middlehurst and Campbell, 2003).

Section E: Analysis and discussion

1. In this section, we provide an analysis and synthesis of the information in the two parts of our report. We begin with a discussion on the importance of context for understanding the themes and issues addressed by the project and then offer comparisons across the countries in our sample in relation to the project's key questions: the nature and development of distance learning, quality assurance and its application to distance learning provision and the interaction between quality assurance and the import and export of higher education.

A: Understanding the national context

2. The domains of interest for this project: Higher Education; Distance Learning; Quality Assurance; and Trade in Educational Services have developed and are understood differently in different countries and regions world-wide. Key contextual factors that influence these domains include; geography, socio-economic policy, the nature and development of the educational system, population growth, regionalisation and globalisation, and policies for economic and cultural development. Furthermore, issues of terminology also intrude since, in all of the domains discussed above, there are few internationally agreed definitions of key terms and even where these do exist current developments are increasingly challenging their validity.

Higher education systems

3. The term 'higher education' has different meanings in different contexts and is often used synonympously with tertiary education, post-secondary education and university education. Definitions used for comparative research, such as the ICSED-97 definition of tertiary education, do not adequately cover the range of

provision in our sample countries, for example, there is no clear institutional boundary between different types of higher education in Australia and the UK and in countries such as Malaysia all education beyond a certain qualification level (the SPM) is classified as higher education. Individual courses and programmes at higher education level may also be taught by non-HE institutions either alone or in partnership with universities as in the UK and Malaysia and, furthermore, new institutional forms are developing, including consortia of institutions, national or individual virtual institutions and hybrid institutions with not-for-profit and for-profit elements (e.g. Malaysia, Australia). The educational process is also being 'disaggregated' (a feature that is already commonplace in distance education) in ways that enable different providers to deliver different parts of the process (e.g., curriculum design, delivery of teaching, support for learning, assessing and awarding).

4. The higher education systems in our sample countries have historically had similar structures, largely due to their early history as part of the British Empire. However, in recent years, changes to their higher education systems have sought to improve linkages and relevance to wider socio-economic reforms and development. For example, Kenya has adopted a revised educational structure based on the Canadian system, and Malaysia and Jordan are re-structuring their education system to aid national integration and economic development. The higher education systems in our sample countries are mostly publicly financed, although there is a growing private sector in some countries, and institutions are encouraged to seek private investment. In Australia and the UK the education systems are organised on a regional basis (countries, states, or territories) although there is a strong federal or national influence on financing and policy.

5. Australia and the UK have two of the most highly regarded education systems in the world and recruit international students at all levels. Both have a large number of public sector universities and very few private universities. They also have high levels of participation at higher education level. Malaysia has rapidly developed its higher education sector in recent years and has historically used education as a means to fulfil key economic and social objectives. Since the mid-1990s, Malaysia has focused on the 'K' (knowledge-based) economy as the key to economic, political and social competitiveness. A liberalisation of the higher education sector in the 1990's resulted in a huge increase in the number of providers, particularly in the private sector. However, demand for tertiary education is still unmet and large numbers of qualified students must either study abroad or in non-university institutions.

6. Until recently Jordan and Kenya have focused on improving access to basic and secondary education, and in Kenya there are still insufficient places for students at these levels. At higher education level, the Kenyan and Jordanian governments have recently licensed more private sector universities in an attempt to meet rising demand, although there are still insufficient places in the university sector, and many students study abroad. Private universities are able to enrol fewer students than the public sector and in a narrower range of subjects. The Kenyan and Jordanian governments have also promoted non-university higher and vocational education in the college sector in the hope that such institutions would offer specialised, career-oriented training, and prepare their students for work in middle-level professions. However, such institutions are less popular than universities due to the perceived employment benefits of university education.

Demand and supply of higher education

7. Demand and supply for higher education of all kinds is increasing across our sample and world-wide, although the reasons for this are usually subtly different in each country or region. For example, demand increases are influenced by reforms and improvements made at lower levels of education (Kenya), a young and growing population (Kenya and Jordan) and demographic imperatives combined with success at secondary level (Malaysia and Jordan) and public polices to increase and widen access to higher education (UK, Australia). All of our sample countries have been seeking to develop their education sectors in order to compete effectively in an increasingly competitive global knowledge economy that requires personnel that possess the skills and knowledge associated with a university education.

Education policy

8. The countries in our sample have similar education policy goals: to increase access and widen participation, increase the economic relevance of tertiary education, improve quality (and often governance and

management) in public institutions, constrain public expenditure on tertiary education or increase the revenue generated by public institutions and increase and enhance science and technology education and training. However, these goals are being implemented in different ways. In Malaysia, national identity, social cohesion and enhancing the competitiveness of the local system are also important policy agendas and in the UK and Australia education export represents a crucial income stream for many local institutions. In countries where the World Bank/WTO is involved in economic policy (e.g. Jordan, Kenya) there is pressure to increase private sector involvement in education to help reduce the public finance burden. The World Bank also encourages international collaboration and interaction as a means of enhancing quality, currency and relevance in local provision. Institutions in all countries are encouraged to develop alternative income streams (e.g. from research, consultancy) and to recruit international students (e.g. UK, Australia and Malaysia).

Increasing availability of distance education

9. The level of distance learning provision is also growing throughout our sample. In two of our sample countries (Australia and Kenya) distance learning has developed as a means of overcoming the problems associated with large geographical distances. However, the supply of distance learning is also increasing in all or most countries as investments in the technological (ICT) infrastructure take place and new providers emerge offering internationally relevant courses. In many countries governments actively promote and financially support distance learning initiatives as a means of widening access to higher education and help produce the resources for human resource development (e.g. Malaysia, Jordan). Countries in our sample and world-wide are investing in local distance learning initiatives (Australia, Malaysia and the UK) and/or are importing distance-based provision from international (Malaysia) or regional providers (Kenya, Jordan). However, it should be noted that the ICT infrastructure is still relatively weak in two of our sample countries (Kenya and Jordan) and in all countries most provision involves a substantial face-to-face and/or correspondence element.

Growth of transnational, private and for-profit higher education

10. In our sample countries there has been a growth in the range of transnational and/or private provision (both for-profit and non-profit) available locally and for export abroad. In Malaysia, this is as a result of limited opportunities of access to higher education, perceived gaps in local public provision (e.g. in terms of employment relevance or flexibility), and a desire for collaboration overseas from local institutions, both public and private (for prestige, quality enhancement and the development of new opportunities for research and teaching). The income generating opportunities arising from the education of overseas' students is also important (e.g. in the UK, Australia and Malaysia) as governments seek to constrain public expenditure on tertiary education. In countries such as Kenya and Jordan there is greater emphasis on the development of the local private sector and at present transitional provision is limited, although both plan to become regional education 'hubs' and to provide education to students in their neighbouring countries. In the UK and Australia there are very few private universities.

B: Distance Learning

The meaning of distance learning

11. Distance learning is a broad concept involving a number of different approaches that reflect both historic traditions in different countries and different mixes of the dimensions of time, place and technology. Distance education often refers to formal programmes delivered by recognised 'higher education' establishments, while distance learning (and open learning) incorporates training contexts, work-based contexts and self-directed learning as well as formal, award-based education. In our sample, providers in developing countries provide materials in whatever form they can access due to infrastructure constraints or because of skills' shortages in the use of ICT (Kenya and Jordan). In Jordan and Kenya distance learning is the term used to describe courses that involve self-study combined with a certain amount of face-to-face teaching or tutorial support. Some countries also restrict the use of purely electronic or 'correspondence-type' distance learning because of cultural preferences for face-to-face contact (e.g. Jordan and Malaysia). In other countries, such as the UK and Australia, technological developments and the growth in flexible

forms of study on-campus, and the term 'distance learning' is often linked with 'open' or 'flexible learning'. In Australia, the often large geographical distance separating learner and provider is reflected in the terminology that is often used, i.e., 'external', 'extramural' or 'off-campus study'. The convergence of face-to-face and distance learning modes is also reflected in the term 'distributed learning' which is gaining currency in tertiary education (and may be used as a synonym for distance learning) and the term 'blended learning' which is widely used in the training field.

Provision of distance learning

12. In our sample countries, the nature, type, origin and amount of provision often varies. Where local provision is less developed (e.g. Kenya and Jordan) there is often significant overseas involvement in distance learning in terms of direct provision through providing distance learning programmes, support for regional provision such as the Arab Open University and the African Virtual University, and supporting infrastructure and content development. Where provision is more developed there is a focus on developing new forms of provision (e.g. e-learning and online provision) and overseas export.

13. In Jordan and Kenya there is very little indigenous or local distance learning provision, and the majority of courses are provided by institutions abroad, either directly, or via a local agent that organises administrative procedures and teaching and examination facilities. The overseas provision is similar to overseas collaborative provision in that it involves on-line or correspondence-based self-study combined with local tutorial support and intensive periods of teaching from overseas university staff (or sometimes brief periods of study abroad). The courses are often professionally orientated course (e.g. business and management) where local provision is limited. However, there are pockets of provision in local universities and private colleges (e.g. the Universities of Jordan and Nairobi) and more provision is planned. In Kenya local provision is usually provided by government ministries for specific skills (e.g. for teacher training, health workers) or in colleges and is based on dual-mode residential and external study.

14. In our sample the Arab Open University (AOU) and the African Virtual University (AVU) represent regional attempts to increase the availability of university education to students (often to disenfranchised groups) via distance learning branches in a range of countries. These institutions receive government and international support (e.g. via the World Bank) and have links with overseas institutions (e.g. the US, the UK, and Canada) to develop, license and deliver study materials and provide qualifications. In addition, national distance learning institutions (e.g. the Syrian Virtual University, UNITAR and UNITEM in Malaysia, and the Open University in the UK) also offer courses to students overseas. In many countries, this form of provision uses mixed delivery modes including textbooks, videos, audiocassettes and educational CD-ROMs, together with tutorial support and facilities in local study centres. To date, the range of courses and student numbers is still limited.

15. In Malaysia, distance learning is well-established in the public sector universities, and is actively promoted by the government as a means of increasing access to higher education locally. Malaysia has a dedicated Open University set up by the public universities (UNITEM) that will eventually provide all of their distance learning activities. Recently, specialist e-learning institutions have begun to emerge (e.g. UNITAR). Both institutions offer courses utilising online material, electronic media, text-based media and face-to-face contact. UNITAR also offers courses overseas and has established regional support centres. Malaysian students also study on overseas distance learning courses where local provision is less developed (e.g. professional courses) although the Malaysian government is concerned about the quality of some of these courses and these are heavily regulated.

16. In the UK and Australia the majority of higher education providers have developed distance-based courses, both in the public and private sectors. In the UK, the distance-based Open University is the largest university in the UK. The majority of provision utilises the correspondence mode supplemented by electronic, video or text-based media and tutor support, although some institutions offer fully or partly-online teaching and discussion. Australia, and to some extent the UK, has much experience of flexible or mixed-mode delivery, where on-campus students have access to certain aspects of their programmes or courses through asynchronous delivery modes. Both UK and Australian institutions also recruit large numbers of international students to distance-based programmes. These courses can involve varying degrees of on-line study, face-to-face teaching, text-based self-study, local support and facilities depending on the national context.

17. Institutions in the UK and Australia are also involved in Universitas 21 Global (with partners world-wide) a consortium of higher education providers that seeks to offer online courses to students worldwide. In the UK, UK eUniversities has recently been established to market and support online courses to students, business and industry worldwide.

Infrastructure and support for distance learning

18. In all of our sample countries, the technological and/or cultural conditions have meant that only limited amounts of distance learning take place fully online and most countries offer such courses using a combination of correspondence based and face-to-face delivery. In the UK and Australia some universities have established Managed or Virtual Learning Environments (MLEs and VLEs) that are able to support advanced e-learning programmes and online support for traditional local and distance courses, although these are still small in number. Most universities and colleges have expertise in developing distance materials and some institutions have world-wide reputations in this field.

19. However, in countries such as Kenya and Jordan, the development of distance learning has been hindered by problems with funding and a lack of necessary ICT and audio-visual equipment. In addition, communication has often been difficult meaning that many distance-based courses involve periods of short, intensive face-to-face teaching combined with periods of supported self-study.

20. Institutions in some countries (e.g. Jordan, Kenya, Malaysia) lack expertise in producing course materials for distance courses, and therefore have developed links with overseas universities (e.g. the UK Open University) to deliver and assess courses initially and help to build local expertise in course design and assessment. This is particularly the case in the local and regional open universities. In 2001, the World Bank and the Australian government agency AUSAID established a $1.5bn initiative aimed at developing and delivering cross-border education in the developing world through local partnerships.

21. In recent years there have been moves to improve the ICT infrastructure in many countries via support from government (e.g. in Malaysia via the MSC initiative) and the World Bank and other international aid agencies. In 2001 the Kenya Education Network (KNET) was set up to help improve the ICT capacity of 23 higher education institutions in Kenya supported by the Kenyan government and the US via USAID, the Leyland Initiative and Insight Technologies. The University of Jordan hosts the Jordan Distance Learning Center, launched in July 2001, as the Jordanian affiliate of the World Bank project on a Global Development Learning Network (GDLN).

Status issues

22. The status and cultural understanding of distance learning varies according to country. In countries such as Australia and UK, distance learning (and forms of flexible learning) has attained a status on a par with traditional forms of face-to-face study. However, in countries such as Malaysia and Jordan, face-to-face contact has a high cultural importance and distance learning has historically been associated with 'second chance' education for weaker students and lower quality education. This has led to regulatory requirements that distance based courses involve elements of face-to-face teaching. In an era of competition for employment in the global knowledge economy attitudes, although changing, will evolve slowly. Much will depend on the recognition of distance learning qualifications by key opinion-formers such employers, professional bodies and academic institutions.

C: Quality Assurance

Development of quality assurance and regulation

23. Most countries world-wide are currently in the process of either developing or seeking to revise their structures for regulation and quality assurance and our sample countries are no exception; the field of quality review is dynamic and fast-changing. However, the stages of development and directions of change differ across countries in accordance with varied histories of quality review, the type of arrangements made and their purposes, the rigour and scope of application and the capacity to implement quality policies. In some countries, the development of quality assurance has taken place in parallel to the expansion and

diversification of provision, and perhaps as a direct consequence (e.g. Malaysia, Kenya, and Jordan). These countries are facing the challenge of developing and financing the capacity to support quality review structures and ensure their effective implementation. Other countries (e.g. the UK and Australia) are focused on ensuring that their quality assurance system remains relevant, effective and suitable for a wider range of provision (such as distance or distributed learning, collaborative provision, and branch campuses) in an increasingly international and competitive context.

Quality review in context

24. Quality assurance and accreditation arrangements in different countries are influenced by the wider context of each country's legislative and regulatory framework. As discussed earlier, different arrangements across countries are linked to 'quality policies' that represent differing levels of devolution of authority from the state (or states, provinces and territories) to agencies and institutions and different histories of voluntarism and compliance to state expectations or requirements. For example, the Malaysian system emanates from the Ministry of Education while the UK system is officially independent of the Department for Education and Skills. In many countries, there are also differences in the arrangements for public higher education and private higher education: in Kenya, the Council for Higher Education is responsible only for accrediting private universities and in Australia, public universities are 'self-accrediting' bodies, with accountability assured through the newly established audits of the Australian Universities Quality Agency. In Jordan, by contrast, the Higher Education Council decided in 2000 to accredit both public and private universities with the same two-stage process.

Terminology

25. There is considerable ambiguity in the terminology of 'quality review', for example, 'recognition', 'approval', 'licensing', 'registration' and 'accreditation' can mean rather different things across countries. Accreditation can apply to a whole institution, a programme or degree, or to a part of the educational service. Similarly, the term 'quality assurance or quality review' may refer to all the arrangements made at any of several levels (institutional, national, international, regional) to assure the reliability and quality of institutions, consortia, other providers, programmes, qualifications and other services. Where quality review arrangements are new, models may be imported from elsewhere, but then adapted to the nature of the higher education system and the specific requirements of the country. It is not safe to assume, either as researchers or as providers of education, that similar terms imply similar processes or powers or have similar consequences.

26. The issue of terminology affects other aspects of our analysis beyond quality review. As discussed above, of higher education can include a wide variety of different kinds of institution and can include or exclude different types of education (e.g. vocational and academic). There is also a variety of terminology used to describe distance learning - distance education, e-learning, flexible learning, distributed learning, open learning – and there is also considerable convergence or blurring across categories. For example, mixed-mode and blended learning typically involves both face-to-face and 'distance' learning and distinctions between distance learning and transnational education may also be difficult to maintain since much of the latter is 'distributed', a term that is gaining popularity in the UK. Technical issues of infrastructure development affect the delivery systems used in different countries (so that distance learning may or may not imply 'electronically-supported learning') and there may also be other factors operating such as the innovative status of 'e-learning' leading perhaps to exaggerated claims of how much is taking place in practice.

Varied arrangements for quality review

27. We have already referred to varied arrangements for the accreditation and/or review of local private and public institutions. Arrangements may also differ for different types of institutions, for example, the review arrangements for universities and further education colleges differ in the UK as do the arrangements for the 'TAFE' and university sectors in Australia. Foreign and domestic providers may be treated differently, with further complications in that foreign public providers may be classed as 'private' when operating outside their home country (as in the case of the Malaysian regulations). The situation as it applies to distance learning also varies across countries, with some important gaps in application. In Australia, for example, because of convergence between types of provision (distance and face-to-face) and

because of a long history of distance learning, the same quality review processes are applied across all types of 'delivery'. In Jordan, degrees obtained solely through distance learning are not recognised at present, but there are currently no problems of this kind in Kenya. However, future reported plans point towards differentiated approaches for residential and distance learning programmes in Kenya. In some countries, institutions (and disciplinary areas) seek multiple accreditation from professional bodies and from specialist agencies such as the International Council on Distance Education in order to have a recognised quality status in international arenas. It is noteworthy that many countries (including those in our sample) are struggling with the quality review of 'pure' electronically delivered education and some do not allow such provision, stipulating in-country partnerships or face-to-face delivery requirements (as in Jordan and Malaysia). It is clear from the wider literature that 'pure e-learning' may not be 'visible' in relation to national regulatory systems and there is concern that deception and fraud may be more common with these kind of programmes and providers as a result.

Variety of actors in quality review

28. Just as there is variety in the arrangements for quality review, so there is variety in those who undertake the reviews. In most countries, the public universities are expected to operate some form of internal quality control and assurance, so the main variation comes at the external level (although internal institutional capacity differs widely). The Australian Quality Assurance framework, for example, lists five main actors with different sets of responsibilities from the federal government level to the state, territory and institutional levels. In the UK, devolved government is leading to variations in quality review between, for example, England and Scotland, although the Quality Assurance Agency operates across the UK and undertakes overseas' audits of UK provision. Important actors in the UK, as in Australia, include the professional bodies and the institutions themselves and there are also a number of specialist agencies for distance learning.

Review purposes, powers, processes and procedures

29. As many authors have reported (see for example, Middlehurst and Campbell, 2003), quality assurance and review practices across countries have different purposes. These include ensuring the relevance of education to socio-economic needs and directions (Malaysia), accountability for the use of public funds (UK and Australia), public information (Australia, Malaysia, UK), maintaining minimum standards (all countries), controlling or containing innovative forms of provision or expansion of provision (Malaysia, Jordan), promoting quality enhancement (all countries). Similarly, the outputs from review processes (reports, performance indicators, legally binding decisions), the 'power' invested in the arrangements and the consequences that flow from accreditation and review practices differ. For example, accreditation can result in permission (or not) to open an institution, launch or market a new programme, operate in a country or gain access to funding, while review arrangements may result in the closure of programmes and institutions or a requirement to make changes to provision.

30. The processes and procedures used differ, with accreditation of institutions occurring in some countries (Malaysia) and not others (UK), and with differences also applying at programme level. Most countries have developed what the UK describes as a 'quality infrastructure' that provides an external framework against which quality review takes place. However, the extent and complexity of such an infrastructure of standards, guidelines, benchmarks and qualification frameworks differs across countries and in some cases there is greater reliance placed on the expert knowledge of technical specialists operating in review teams and committees. In all countries, there is recognition that some of the requirements and procedures applied to 'traditional' providers and provision need to change in relation to the specific features of electronic delivery, multi-agent provision and the territory of 'borderless education' and countries are at different stages in tackling these issues.

Status and capacity

31. The status of distance learning varies across countries for reasons of history, culture, geography and technological development. Quality review arrangements may or may not have (yet) had an impact on this status and this situation is further complicated when distance learning is associated with foreign providers and provision. Public perceptions, employer confidence and government or state regulations may take longer to change than arrangements for quality review so that existing institutional and national reputa-

tions remain important. However, there are signs that the combined force of strengthening regulations and development of quality review arrangements, increased sharing of information between agencies and countries, the increasing variety of provision and cross-fertilisation of opinions and attitudes in-country is having an effect on traditional perceptions and reputations. For example, Malaysia is able to compare UK and Australian provision offered to Malaysian students in Malaysia and in the UK or Australia and to draw conclusions about quality and standards. In Jordan, the growth of indigenous and regional distance learning, the greater emphasis placed on ICT development and the new quality review frameworks may soon affect the acceptability of degrees gained by distance learning. However, there remains an issue of capacity to develop and undertake rigorous and effective quality review practices given the variety, complexity and scale of provision that now exists within and across countries.

D: Trade in education

Terminology

32. There is an increasing volume of importing and exporting activity around the world (OECD, 2004, forthcoming). This covers many types of 'trade', both official and unofficial, linked to profit-making and non-profit educational activities. The GATS provides some definitions which can be applied in relation to the import, export and 'exchange' of higher education, including distance learning across national borders. These are; Cross-border supply; Consumption abroad; Commercial presence; and Presence of natural persons. However, as we have seen when applied to 'higher education' a wide variety of provision may fall into these categories and there are also specific problems related to transnational distance learning in that many types of provision do not fall neatly into just one category of the GATS terminology.

Nature and extent of TNE provision

33. Although the flows are never totally one-way, our sample countries are split into net exporters (the UK and Australia) and net importers of higher education (Jordan, Kenya and Malaysia). However, all of our sample countries aim to export higher education services, and the current net importers are all seeking to become regional 'hubs'.

34. The UK and Australia both have long histories of educating international students, the majority of these students travelling from abroad to study, and these countries rank second and third respectively behind the US in terms of international student numbers. Institutions in both countries provide a wide range of different types of transnational provision in addition to domestically-delivered programmes including; collaborative courses, franchising, twinning, branch campuses and articulation arrangements. In addition, institutions have also formed consortia with other international institutions and companies (e.g. the Worldwide University Network and Universitas Global) to offer courses overseas. The UK recruits students from around the world, and Australia is particularly successful in recruiting students from Asia, where the market is expected to grow significantly in the coming years. Neither country imports a significant amount of higher education provision, although pockets do exist including provision for ex-patriots and other specialist groups.

35. Since the reform of the higher education sector in 1996, Malaysia has been active in the import and export of education, and this has been encouraged by the Malaysian government. The country hosts examples of all types of transnational arrangement (mainly from the US, the UK and Australia) and also has 5 institutions with branches overseas as well as exporting distance learning via UNITAR. Transnational provision in Jordan and Kenya is more limited. In Jordan it is dominated by distance learning courses, although there are also a limited number of partnerships between Jordanian and overseas institutions, mainly in subjects where local expertise is limited. In Kenya, trade in educational services is limited so far, although there are twinned and collaborative courses involving Kenyan institutions and overseas providers. Both countries have historically sent a large number of students abroad to study at higher education level due to the limited amount of relevant local provision.

Government policy towards TNE

36. In Australia and the UK the export revenue from transnational education contributes significantly to the revenue and prestige of the higher education sector, and their governments both actively brand and market their provision world-wide. The British Council and IDP Education Australia are organisations actively concerned with overseas marketing and recruitment of international students. The governments also seek to promote the non-financial elements of international education such as the cross-border exchange of people and ideas and research collaboration. Because of the importance of higher education as an export industry, both Australia and the UK are seeking to monitor the quality of their provision delivered overseas via overseas audits. The Malaysian government has historically welcomed international input and transnational provision in the national education system due to the opportunities for access to high quality courses, expertise and professionals in areas where local provision is under-developed. However, there is also a long-term intention to reduce overseas study due to currency outflow and to develop local provision for overseas export. In Jordan and Kenya, transnational provision is seen as a vehicle for increasing access to higher education to local students and as an opportunity to gain export revenue from locally run courses offered overseas. Kenya is keen to support the establishment of overseas branch campuses, whilst in Jordan there is a quota of 10% international students in the public universities.

GATS positions

37. The countries in our sample, and world-wide, differ in their attitudes towards and positions taken in relation to the current GATS negotiations. The Arab nations, including Jordan, were absent from the most recent negotiations, and Malaysia has not yet made and offer on educational services. The UK, as part of the EU, has declined to include higher education in its initial submission and has stated that it will not make any GATS commitments that will endanger the public funding and regulation of HE. Australia was supportive of liberalisation of trade in educational services in its submission to the WTO, although it too is keen to protect national funding and regulatory powers. Jordan and Australia are two of a number of countries in the Education Alliance convened by Norway to explore issues surrounding education as a tradable service.

Regulation of trade in education

38. Different countries pursue individual policies for the regulation of transnational provision for both their own institutions and overseas providers. Importers of transnational provision have varyingly strict regulations for overseas providers, whilst the exporters (e.g. the UK and Australia) have regulations and codes of practice for local institutions' provision overseas. Many countries lack the finance, capacity and expertise to regulate the higher education sector and in some countries institutions operate outside the system (e.g. Kenya, Malaysia). In addition, government control is limited to those providers that maintain a physical presence in the country, thus falling within the regulatory system and this leaves gaps where students, institutions or employers have to make their own judgements about the quality of some providers and provision. In some cases, exclusions are explicit: in Malaysia, for example, courses from overseas providers or distance courses with no face-to-face contact are not recognised for the purposes of public sector employment, since their quality cannot be assured.

39. The regulation of transnational provision in importer countries is marked by inconsistencies and omissions, which can both limit the type of provision available and allow other types of provision to exist uncontrolled. This has fuelled quality concerns and has meant that many transnational courses are less well regarded than overseas study and local public sector provision (e.g. Malaysia, Jordan). Jordan requires overseas courses provided jointly with private Jordanian providers to be accredited, although those provided in partnership with public institutions do not have to meet this requirement. Malaysia and Kenya require overseas branch campuses to achieve Malaysian accreditation as well as accreditation in their home country, and have restrictions concerning curriculum relevance and ownership. In addition, Malaysia and Jordan have accreditation systems that do not take account of the special requirements of distance based overseas courses and require a certain amount of face-to-face contact.

40. However, it should be noted that most regulation systems are currently undergoing revision to address the varied types of provision that are now developing world-wide. For example, Malaysia has recently been

forced to compromise the nationalistic elements of its curriculum requirements, Kenya is amending its accreditation requirements to allow the establishment of branch campuses, and Jordan is revising its policies related the face-to-face requirements for distance learning.

41. Some importers (e.g. Jordan, Kenya, the UK) also rely on the effectiveness of exporting country quality assurance systems, whilst the Malaysian government seeks guidance from overseas quality assurance agencies (e.g. the UK QAA and the AUQA in Australia) on collaborative provision. The UK and Australian quality assurance systems are well regarded world-wide for their rigour. Australia has a detailed quality control system for provision to international students both in Australia and overseas. In both the UK and Australia overseas provision is either included in the institutional audit process, or conducted via a separate audit. Both countries also have a code of practice for collaborative provision and for distance learning courses. In addition, there are plans to audit Australian overseas provision on a whole of country basis and the Australian government also has regulations for overseas institutions seeking to operate in Australia.

Section F: Policy issues and implications

There are a number of policy implications that arise from this study and we list them briefly as a basis for discussion among the members of the International Commission.

1. An understanding of the both the historical and the current context of each country is important both for researchers and for countries that are seeking to export provision. Institutions, quality agencies, and relevant government departments need to be well-informed about the specific socio-economic and cultural environment in which they (or their members) are seeking to operate and to recruit students. It is desirable for further country-specific studies to be undertaken to assist in mutual understanding and the collection of comparative data and information.

2. International agencies such as OECD and UNESCO need to give attention to the issues of data gathering and comparisons across countries since existing data categories and terminology are increasingly problematic in the context of 'borderless education'. In addition, due to the rapidly changing nature of higher education, it is becoming increasingly important to ensure that data is as up-to-date as possible so that valid conclusions and comparisons can be made.

3. In response to demand, the supply of higher education is increasing and becoming more complex in form and substance. There is great variety in the forms of provision and types of providers and in combinations of both. Competition and collaboration exist side by side in many regions. Monitoring and regulating quality and standards in this context is in consequence also becoming a more extensive, complex and expensive business. Smaller and developing countries need assistance with capacity building either at a local or regional level. Those with more mature quality review arrangements will also need to build capacity to monitor transnational and distance learning provision and may wish to consider collaborative international arrangements.

4. There appears to be a gap in the quality review of wholly electronically-delivered provision within our sample countries and across countries. Such provision appears to be outside many regulatory frameworks and quality review (if supplied at all externally) appears to be provided by private sector external agencies. This may be appropriate, but discussion across agencies and countries should at least address this issue.

5. There are many differences in the arrangements for quality review across countries in relation to, for example, public and private provision, distance learning and face-to-face provision, and vocational education and training and academic provision. It may be useful to seek convergence across these different categories (since the provision itself is converging and the boundaries of provider and provision are blurring). There may also be quality enhancement benefits and (in some cases) economies of scale to be achieved. However, where there are clear differences in the nature of provision (as with electronically delivered learning) accreditation and review procedures also need to be adjusted.

6. We have noted inconsistencies and omissions within the regulatory frameworks of importing and exporting nations. There is a need to address these issues at an international level as it may be more economic and also more valuable to address the key issues collectively while allowing for necessary differences in each country or region.

7. We have not been able to gather precise and detailed data on the impact of quality review practices on the import and export of distance learning. If the issues of terminology described above can be overcome, then such data needs to be collected through in-country studies and over a period of time to establish a base-line and identify trends.

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