

DISTANCE EDUCATION AND ITS INCREASING IMPORTANCE*

I would like to give you a very informal survey on the topic of the growing importance of distance education and for that I would like to begin with a personal definition of distance education.

You will find many words dealing with the theoretical and conceptual aspects of distance education. In order that we know what we are talking about, I would like to define distance education as a methodology, based on the principle that adults can learn for themselves provided they are given the appropriate materials to learn from; and that there is an institution that establishes a formal or more or less formal link with them so that they are able to discuss things. The methodology is based on a self-learning process but it is not considered distance education, for instance, when a person buys a text from a bookshop and learns by himself, there are some elements lacking; he has no institution or link with a teaching institution.

It is necessary to consider what components are necessary for a distance education regime to exist. You have to have an institutional structure or a system responsible for the whole operation, then in this institution you have to count on the existence of qualified professors, research scientists, specialists who are able to design the curriculum and define the contents of whatever you are going to teach. You then have to develop some way of making the learning materials accessible to the students; these are the didactic materials, which will be in written form, books, broadcasts radio and television or magnetic tapes, video cassettes or audio cassettes or even in the form of educational software to be used with a computer and then, for this to work, you have to have the students. You have to know these students, you have to identify them, so that you can contact them and be sure that this distribution of the learning material reaches its final users and that the answers or reactions of the students reach the structure. You have to assure that the interaction between students

* A. Rocha Trindade, então vice-presidente da EDEN (European Distance Education Network), foi convidado, como orador principal, para a 1.^a Conferência Anual desta rede europeia, em Krakov, Polónia, 1992. Esta comunicação foi posteriormente publicada nas Actas. Os participantes nesta conferência eram educadores e planeadores de educação de países do Leste europeu. (N.E.)

and the teaching structure will be possible through the pure use of communications, by mail, telephone, by fax, etc; or possibly by providing opportunities for the students to attend locally and in the face to face situation qualified people who could give them advice either in organisational terms, or in administrative terms, or in scientific terms, or pedagogical guidance. Local meeting places are normally called study centres and they are an integral part of almost all of the existing distance education systems. And finally you have to provide means to evaluate the progress of students; their performance in acquiring new knowledge or skills has to be assessed and if that is the case, to be accredited so that some kind of certificate or diploma can be honestly delivered.

One general characteristic of distance education systems or modes of operation is flexibility. I mean flexibility in terms of place, of time and of pace. Firstly, of place, because the students might be working at their own preferred place for learning: at home or at work if they have facilities for that, they do not have time to attend classes, so distance education gives them a flexibility of learning at different places from that which is delivering the teaching. Flexibility or freedom of time allows that they might choose the most appropriate time of the day or of the year to study; they are not subject to a strict time schedule like that imposed if they were attending face to face tuition and, of course, they have the possibility to adopt their own pace. Most of the users of this kind of system are adults. Some will have family responsibilities, and many will have professional responsibilities and so they have to pace their own efforts in a way which is compatible with these responsibilities.

And finally there is another point which is the flexibility of course content. For this I would like to consider what could be called a case study of the Latin countries in Europe as compared to other areas in Europe like Central, Northern or Eastern Europe.

In Latin countries we have a tendency not to be flexible; we have a tendency to be rigid. To give you an example, in my own country a university which benefits from a very large degree of autonomy is still not able to change for itself the full content and duration of a degree course; all changes must be published in the Official Journal. This shows you that the content of the curriculum is not flexible; also in Latin countries, there is a tendency for length of study time to be rather large. For example, the basic university diploma in Portugal takes 5 years for most subjects but can take as long as 7 or 8 years, although most of the Latin countries have been trying to create alternative degrees. I continue to discuss this kind of parenthesis so that I can frame my following remarks.

I would say again that formal education in southern countries tends to be rigid and so when we talk about flexibility of content and flexibility of curriculum it mostly does not apply in Latin countries. There is another interesting quality of the Latin countries, which is a separation of formal education on the one hand and training on the other hand. For instance, they belong to different Ministries and these Ministries do not have a tradition of good co-operation; this is not good because nowadays as there is less and less difference between education and training. Training in my country has a tendency to be considered only as initial training and there are no visible mechanisms of the provision of continued training. Similarly with education, we do not have a long tradition of continuing education. Adult education in Portugal is almost a dirty word, in the sense that adult education means education for an older generation, which still comprises a large proportion of illiterates. To most people, adult education means that you are not educated at all. Whatever their initial education, all individuals need the provision of lifelong education.

There are also interesting differences between public and private systems. Public education is dominant in the southern countries of Europe. In primary and secondary education the tendency to have private schools is linked to the financial capacity of families. People who are well off may send their children to private schools, whereas most of the population will send children to the public system. When reaching the higher education level, and having a very old and prestigious University which has just commemorated 700 years in Coimbra, we have perhaps tended to be over conservative in terms of higher education; the private University is a new phenomenon in Portugal and is something that came from the lack of capacity of existing public universities to admit all the students. There was an explosion of demand for higher education diplomas and, consequently, the private university phenomenon is a recent one and we have mixed feelings about that because there is a tendency, due to our over conservative point of view, to say that the conventional state public universities are the good ones.

Having said that we can now discuss this general context of the distance education model. Of course the simplest solution is to have a large education system, possibly a national system, dealing with education at all levels including higher education, post graduate studies and also the training conducted in the distance education mode so that it will be a part of the national system of distance education. This exists in Spain, Portugal and in other countries but it does not mean that other institutions using distance education do not exist. In most other countries there are other operators, for example the Polytechnics, working on distance education or public agencies like training agencies using distance education technologies

or methodologies, and there might be a number of private operators in some countries where the development and supply of distance education services and products is more developed than in others. For example, in the United Kingdom there are a number of different types of distance education systems delivering their products and services to a growing number of individuals or enterprises.

Some conventional systems of higher education have adopted distance education models to deal with their extra mural students. A typical case of that is France where there is no national, distance education university, but there are something like 23 public universities that have distance education departments to care for extra mural students. So these universities work in dual mode; they work both as conventional universities and as distance education universities. Another interesting case is that of enterprises and corporations which are large enough and have big enough employees to justify, in financial terms, the creation of their own systems for training and further education within the enterprise or corporation itself.

This is becoming more and more prevalent in Europe and has existed in the American continent for some time. Then you also have the existence of many organisations that just produce written materials, software or video products for education and training. They sell them to individuals or organisations which are not able to produce learning materials. It is a complex picture and it shows that almost every possible nuance and every solution applies and flourishes.

From the point of view of the user, I would say that there is a growing public awareness of the need for distance education. On one hand there are individuals who have no other choice if they want to pursue their studies because they are far from higher education centres or their time is taken by their professional or family duties. Distance education is a solution for them and it is growing more and more popular. There are four very big distance teaching universities in Europe which each cater for more than 100,000 students. Enterprises are now beginning to look more carefully at distance education. It requires a certain dimension and a certain financial strength for an enterprise to be able to devise and install its own training facility. One possibility is to associate with an existing distance education system and to create a centre of resource within the enterprises where materials are made available to employees, allowing staff to acquire new qualifications or to update their qualifications in terms of their own interest and that of the enterprise.

Now I would like to discuss some political aspects of distance education. One of them is that for a country that does not have a distance education system it is a difficult system to install. In my own country it took 12 years of convincing, not only the government and individuals but most of all convincing the conventional universities that distance education was a credible system for teaching higher education. Higher education institutions tend to be over conservative, they tend to exploit their own methods as the only possible methods for learning. So it takes a lot of convincing to make it acceptable to society, decision makers and the university culture.

One big step towards the growing interest in distance education and its growing acceptance was a recommendation by the European Parliament in 1987 that distance education, and more particularly Open Universities, should be encouraged to work more and more to the benefit of the part time students. It is an extensive document and a very interesting one because it takes a strategic view of the general problem of education and training in Europe, but I believe it applies elsewhere. You cannot afford to put tens of thousands or hundreds of thousands of people back to school again; you cannot close a factory sending the employees home and say that they need to retrain unless they wish to become redundant. It is a social responsibility of the state to ensure the existence of mechanisms for quick and efficient retraining of the working population. Another situation is when you have considerable political change in a country; the Portuguese have a small experience of this which might in some way be relevant to the experience in the eastern countries. In 1974 we became a democracy after 40 years of dictatorship. Everything changed, the way of thinking, society, the industrial fabric and the liberal relationship. There was a need for massive retraining of all segments of the population and we were unable to do that at the time; it took us too long to be able to make this conversion. One major need was in the field of public administration and local administration; civil servants were used to working under an autocracy and it is quite different to work in a democracy. Society has to change in as short a period as possible and it is my personal belief that distance education systems are just the answer to that because they allow for flexibility of time and pace, flexibility of contents; you can provide the education and training that people are interested in, on one hand and take their advice on the other hand. In Portugal, the worst enemy was the Council of Portuguese Rectors representing the other 12 or 13 conventional universities which did not recognise the need for a new university. They said no: "Portugal is a country with 10 million inhabitants and 12 or 13 universities is quite enough, we don't need more than that." On the other hand they were worried about the possibility of more flexible structure being

able to attract some of their own target population which could be serious, not for the big traditional universities but rather for the more recent and peripheral ones. The other problem was government. If you look into this from a very pragmatic point of view you may consider universities as difficult and dangerous, academics tend to talk too much and to be rather difficult to control so my other task during this 12 years it took to create the Portuguese Open University, was to convince the government, politicians and political parties that it was really not dangerous at all to have an Open University in Portugal. It might look dangerous but it was not. If you look at it like this, you would conclude that to launch an Open University system you need convergence within society; you need the goodwill and political will of Government; you need the support or at least the neutrality of the University system, you need the support of public opinion; and you need the support of prospective users of distance education like productive organisations, employers, associations and trade unions.

The next step for that is to look into costs: cost on the one hand and benefit on the other hand. The relationship between cost and benefit is much more favourable for distance teaching universities than for classical universities, it costs less and most of all it touches a segment of population that cannot be touched by conventional university systems.

Another issue I would like to talk to you about is international co-operation. It is much easier to collaborate within the framework of distance education systems than elsewhere. For instance, if a university wants to introduce new subjects where there might not be qualified people available to teach them they have to recruit the specialists from outside. It is a good way, but sometimes the good specialists are not available to come and you only get the second rate ones. However, you can import a very good quality course in distance education. By a shorter process of training and of transmitting the knowledge to the number of associate teaching personnel, it is possible to launch this new speciality. International co-operation is important in distance education and it is an adequate way to solve countries' problems. After the recommendation of the European Parliament some initiatives of European co-operation, within the countries of Western Europe took place. The creation of the European Association of Distance Teaching Universities and other networks, many of which are represented here, are comparatively recent but are on a good way to producing new things.

The European authorities have taken a number of initiatives designed to improve either the co-operation or the development of distance education in Europe by recognising the strategic importance of distance teaching systems. A number of documents that have

been produced and initiatives developed, for instance there is a memorandum on distance education, which is an important document, and I believe that in the very near future there will be others. Last March 1992, there was a conference in Lisbon organised under the auspices of the Portuguese Presidency of the Council of European Communities. It was designed to look at the problem of how to organise and structure a market for distance education and training, how to organise the suppliers and the demand side of the market. Trans-European initiatives have become important issues for resource. You know if it is not too difficult to work within your own countries but it is much more difficult in practical terms when you want to work outside your frontiers. It would be useful to have significant funds available to finance these initiatives either from government funds of the member countries, or European funds from European programmes. If there is discussion of the importance of distance education and how to structure this market, there are private interests involved, and there should be private capitals in this market. So funds needed to improve and develop transnational operation in Europe have to be constituted by a national institution certainly but also from private investors. My personal belief is people are becoming aware generally in Europe that distance education is an efficient way to deal with necessities of education and training in Europe on the one hand. On the other hand, qualifications are an important asset for a country to have, the more qualified the citizens are, the more free they are, and the more potential for development they have.

I just would like to tell you one thing, one last snag. The kind of informal speech I am doing now, I did for years within my own country when I was trying to sell the idea of distance education. I decided there was an argument which was: "if you give too much education to people they become much more dangerous if they are unemployed". This argument struck a chord in the audience and there were people nodding. That's terrible. My answer to that was I would rather have an unemployed person with a PhD than an unemployed person without qualification. Someone who is qualified can find work more easily than an unqualified one, and if he does not find a job he has the potential to create his own job, which an unqualified person does not have.

So I finish with what might be called an act of faith saying that we need more education, we need more training and we need more qualification just to survive, and distance education is just the answer for that.