

DISTANCE EDUCATION IN HONG KONG

Andrea Hope

Hong Kong Shue Yan College

Bob Butcher

Open University of Hong Kong

Hong Kong's economic fortunes have always depended on trade with China. By the mid-1980s, the colonial higher education system was catering to only 6% of the 18-20 age cohort and there was a backlog of adult learners who had been denied access. The Open Learning Institute of Hong Kong was launched in 1989 to overwhelming public response. It established distance education as a viable and respectable delivery mode in the territory and gained university status in 1997. Since 2001, however, the Open University of Hong Kong (OUHK) has lost market share to local and international competitors and has had to diversify to survive. In 1997, Hong Kong became a Special Administrative Region (HKSAR) of the People's Republic of China (PRC) and the OUHK has been working to demonstrate how its adapted model of supported distance education can meet the challenge of providing accessible, cost-effective, and flexible learning opportunities to enhance economic and social development in the PRC.

The key to success in distance education enterprises is a good alignment of the context in which they operate, the activities which they undertake, and the way they are executed (Peters, in press). From a geographical perspective, Hong Kong may not appear to provide the perfect environment for the development of distance education. It is a territory in southern China that covers only 1,100 square kilometres, much of which consists of a

COUNTRY PROFILE: Hong Kong

Hong Kong was a British colony for almost 150 years. In 1997, it reverted to Chinese control but it enjoys a special, often privileged, status. It shares a cultural background with the Chinese People's Republic. Hong Kong has 6.5 million inhabitants, who mostly speak English and Cantonese, which are the official languages. The current literacy rate stands at 93%, while life expectancy is 81 years.

Distance education in Hong Kong was a little slow to take off, but the establishment of the Open University of Hong Kong has changed a lot and has been beneficial for the many people who look for a college degree. It is spreading to mainland China, promising an exciting future for distance education in the region.

—*Lya Visser*

• **Andrea Hope**, Associate Academic Vice-President, Hong Kong Shue Yan College. E-mail: ahope@hksyc.edu

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sparsely populated rural hinterland and uninhabited islands. At the same time, it is home to 6.8 million people with a population density in downtown Kowloon in 2003 of 43,030 per sq. kilometer. Its urban centers are well connected by an extensive road and rail network and an efficient and cheap public transport system. It has a highly developed technological infrastructure with a home Internet usage rate of 60% in 2003 and one of the highest mobile phone ownership and usage rates in the world, with 1,056 subscribers per 1,000 population in the same year (Census and Statistics Department, n.d.).

The penetration of distance education in Hong Kong began in the 1980s and has been exclusively in the areas of tertiary and continuing and professional education. An analysis of its development reveals that its introduction and the forms that it has taken owe more to the economic, political, and cultural context than to any geographical imperative.

Hong Kong has limited natural resources, and its economy is basically market driven. While China was closed to the outside world from 1949 to 1978, Hong Kong was able to harness the labor of the hundreds of thousands of refugees who fled into the territory to develop a vibrant manufacturing sector that created a booming economy. Since the 1980s, however, manufacturing has relocated back to China, and Hong Kong now depends on the tertiary services sector for most of its activity. It is a major international banking and finance sector, and the most important entrepôt for the export of Chinese goods all over the world. It is one of the Asian tiger economies and, despite fierce rivalry from its near neighbors, Singapore and Kuala Lumpur, claims for itself the title of Asia's World City (Hong Kong SAR Government, n.d.).

The 1980s were a period of political turmoil and uncertainty in Hong Kong. Hong Kong became a British colony in 1842. In 1984, after a decade of negotiation, Britain and the People's Republic of China agreed to Hong Kong's return to China and a new identity as the Hong Kong Special Administrative Region

of China (HKSAR) from July 1, 1997. Under the "One Country, Two Systems" policy, Hong Kong is given considerable autonomy over administrative policy, allowing its existing social and economic systems to remain unchanged for 50 years. The Sino-British Joint Declaration of 1984 was designed to reassure the Hong Kong population, many of them refugees who had fled China following the Communist takeover in 1949, that Hong Kong's low-tax, laissez-faire capitalism would continue after 1997. Many of the better-educated decided that it was not a risk they wished to take and the territory experienced the beginning of a serious brain drain. The steady flow of leavers increased to a flood after the bloody crackdown by the Chinese army on pro-democracy activists protesting in Tiananmen Square, Beijing, on June 4, 1989 created panic in Hong Kong. At the height of the brain drain in 1995, Hong Kong's population growth of 2.6% was only achieved because the 45,986 legal immigrants (mostly from China) outstripped the 43,000 emigrants that year. These economic and political conditions created new demands on the existing education and training sectors to which the government had to respond.

Hong Kong's tertiary education system was developed in the British tradition, on lines that will be very familiar to anyone with knowledge of education in commonwealth countries. Its institutions of higher education were (and remain) predominantly publicly funded and were established as elite institutions serving an increasingly prosperous Chinese middle class who could nevertheless not afford to send their children abroad to elite institutions in the United Kingdom or United States to study. Table 1 summarizes the history of fully-funded universities in Hong Kong.

In 1987, there were 4,500 full-time, first-year, first-degree (FYFD) places available in publicly-funded institutions, sufficient for only 6% of the relevant age group. Concern about lack of adequate provision for tertiary education was exacerbated in a Chinese society that traditionally sets a high value on education and

TABLE 1
Fully-funded Universities in Hong Kong

<i>Institution</i>	<i>Founded</i>
The University of Hong Kong	1911
The Chinese University of Hong Kong	1963
The Hong Kong Polytechnic University	1972*
Hong Kong Baptist University	1983**
City University of Hong Kong	1984*
The Hong Kong University of Science and Technology	1988
Lingnan University	1992 [#]
The Hong Kong Institute of Education	1994

*Granted university status in 1994.

**Date became government funded. Established as private colleges before this date.

[#]Granted university status in 1997.

was eager to enhance its career opportunities through investment in training and intellectual development (Dhanarajan, 1992).

The extramural departments of the two universities and the HK Polytechnic provided opportunities for continuing education. There was, however, no system whereby credits obtained through extramural study could be counted toward degree study in Hong Kong. A number of overseas tertiary institutions provided costly access to their distance education programs, especially in business education, at both the undergraduate and postgraduate level. The demand for such courses emphasized both the lack of opportunities for further education within Hong Kong and the desire of Hong Kong residents to obtain qualifications, especially those recognized abroad. One such entrepreneurial provider was the Open College of the University of East Asia (Macao). Its revolutionary approach was to control the costs of distance education delivery by importing high-quality courses from established open universities around the world and providing locally-based infrastructure and student support. Despite not being recognized by the Hong Kong government, the courses (imported from the United Kingdom, Australia, and New Zealand) proved very popular with adult learners in Hong Kong, who happily took the 1-hour ferry ride to the neighboring Portuguese

enclave of Macao for their tutorials on weekends.

Distance education institutions around the world have usually been established in response to demands for access, cost effectiveness, and flexibility (Daniel, 1997). All three factors have played a part in the development of distance education in Hong Kong.

As Jegede (in Cohen, 2000) noted,

The greatest distance here ... has long been between the traditional centers of learning and a population where thousands and thousands of people, limited by work, finance, and time, clamor to be part of a system which until recently had no means of accommodating them. (para. 16)

The case for taking advantage of Hong Kong's small geographic size and advanced technological status for the introduction of distance education to overcome the shortcomings of the existing educational provision was first made publicly in the Llewellyn report in 1982, which stated:

With its small geographic size and its high technological standard, Hong Kong would be eminently suitable for a system of education by radio and TV, combined for example, with weekend study camps and evening tutorials.... We are thinking of a large scale comprehensive alternative to institutionalized education. (Llewellyn, Hancock, Kirst, & Roeloffs, 1982, p. 75)

A 1986 report of the Education Commission sanctioned the idea and defined the objectives of Open Learning in Hong Kong as follows:

- To provide a second chance for those who had to forgo or were denied the opportunity of further education when they left school, or whose requirements for further education developed relatively late in life;
- To provide continuing education to update and enhance the training of those who completed their further education at the beginning of their careers; and
- To provide retraining for those who need to change or extend their career or vocational skills later in life to adapt to technological, economic or social change. (Education Commission Report No. 2, 1986, p. 146)

In 1987, a planning committee for setting up the Open Learning Institute (PCOLI) was approved by the government and, within weeks of the PCOLI submitting its report in early 1989, legislation was passed in May, bringing the institute into being with a mandate "to provide opportunities for higher education by means of open learning and thereby advance learning and knowledge, and enhance economic and social development, in Hong Kong" (OLI, 1989). The government was already committed to a costly program of rapid expansion of full-time face-to-face provision for 18-20 year olds in the late 1980s and early 1990s, which resulted in 25% age participation rate by 1998 (French, 1999). Moreover, it held fast to its belief in a user-pays principle where adult and continuing education was concerned. It was therefore perhaps inevitable that while the government provided all the start-up costs, the institute had to commit to becoming financially self-sufficient by the fourth year of operation.

Hong Kong prides itself on its business acumen and entrepreneurial flair so, nothing daunted, the OLI determined to take in its first

3,500 students in October 1989. Everything about the OLI was new for Hong Kong. It was to operate an open entry policy, which meant that prospective students needed only to possess a Hong Kong ID card and to be at least 18 years of age to be eligible to register. Students would register in courses, not programs of study, and would be able to accumulate credits toward defined awards over time. Students could study as many credits as they wished, and there would be no penalty for taking time out from study. They would be able to transfer into the OLI credits that they had obtained for successful completion of study at an appropriate level in a recognized course elsewhere through a system of Advanced Standing. All students would be allocated to a tutor in groups of no more than 30. The tutor would not teach the course but would provide advice and guidance and feedback on assignments submitted in completion of the continuous assessment requirements that were a feature, along with a 3-hour written examination, of the assessment policy of each course. Comprehensive printed course materials would be supplemented by regular TV broadcasts and by optional attendance at tutorials that would be held in the evening and on weekends in rented facilities at other tertiary and secondary education establishments around the territory. In order to get up and running quickly, and to keep academic staffing costs as low as possible, courses were bought from other providers. A library and study center was established in the urban area to supplement the course materials and provide much needed study space for students whose cramped housing conditions precluded quiet space for study. The few core staff who had been appointed were busy holding public meetings to explain the concept and introduce the first eight courses to a somewhat skeptical Hong Kong.

Many people thought that open access distance education would never catch on in small, status-conscious Hong Kong, but when the doors to the sixth-floor office suite in a busy downtown shopping district that played temporary host to the fledgling institute

opened to distribute prospectuses in late July 1989, there was a queue that wound all the way up the stairs, around the back of the building, and into the main road. At one point, the police estimated that there were 10,000 people in the queue and two streets had to be closed to traffic (Kiloh, 1999, p. 50). By the end of the application period, more than 63,000 applications had been received. Eventually, 4,237 students enrolled, and the only dedicated distance education provider authorized to award degrees in Hong Kong was launched.

By the time of its tenth anniversary, in 1999, there were 25,654 registered students; 140 courses were being offered, many of which, particularly in business and Chinese, had been specially commissioned for delivery in Hong Kong; 2,500 students had graduated with degrees that were recognized by the government as the equivalent of those awarded for completion of the full-time, face-to-face programmes in the funded sector; the institution had an operating surplus; had fulfilled all the requirements to attain self-accrediting status (a necessary condition for university status under the U.K.-influenced HK quality assurance system); had moved into its own purpose-built campus; and had been awarded the title of the Open University of Hong Kong in 1997.

This was a remarkable achievement by any standard, and one that mirrors many stories of success in Hong Kong, built on a convergence of good timing, sound financial backing, charismatic leadership, and the hard work and seemingly boundless enthusiasm of a small band of staff. However nothing stands still, and in the last 5 years, significant changes have taken place in the operating context of the Open University of Hong Kong that have intensified competition for students and have necessitated change to ensure its survival. Key among them are the global reach of Internet-based technologies, which has enabled penetration of the Hong Kong distance education market by a significantly larger number of international distance education providers; a

severe reduction in public funding to the higher education institutions in the public sector, combined with a rapid diversification by those institutions into the provision of self-financing, part-time degree and subdegree programs; and the rapid expansion of the China market.

International competition has always been a fact of life for the Open University. By accommodating the provision of courses by overseas providers, the government has been able both to expand its capacity and to enhance the global interactivity of its people and institutions (Evans & Tregenza, 2001). According to figures provided by the government, as of March, 2005 there were 984 programs operated by overseas institutions available in Hong Kong (<http://www.emb.gov.hk/index.aspx?langno=1&nodeid=1250>). The vast majority of these programs come from the United Kingdom (51%) and Australia (30%), with others coming from countries such as Canada, the United States, and Mainland China. It is estimated that currently over 50,000 students are studying nonlocal programs offered in Hong Kong, mostly through the continuing education units of government-funded universities.

More significant competition was presaged by government proposals for the reform of the education system, issued in 2000. The proposals articulated the goal of achieving a participation rate of 60% of the relevant age cohort of the population in a redefined higher education sector that would seek to equip students with knowledge in multiple domains, all-around analytical skills, and a flexible, adaptable and creative mind (Education Commission, 2000, p. 4). Toward this end, it was proposed to establish community colleges with the objective of:

- providing learners with an alternative (articulated) route to higher education;
- providing a second opportunity to learners who have yet to attain qualifications at secondary level through formal education; and

- providing opportunities to acquire skills and qualifications that are recognized by employers to enhance their employability.

These objectives and the associated operational principles directly challenge the features that had been the Open University's competitive advantage in its early years:

- Lenient entry, stringent exit;
- Flexible mode of learning;
- Flexible course duration; and
- Diversified source of subsidies (Education Commission, 2000, p. 96).

In its stocktaking survey of November 2000 to October 2001, the Education and Manpower Bureau (2004) estimated that there were 1,479,044 students taking some 36,624 continuing education courses in the SAR. It was estimated that 4.1% of these were studying by DE.

The number of students studying for a qualification by distance education at the OUHK reached a peak in October 2001. At that time, there were about 27,000 registered active students, of whom over 17,000 declared that they were intending to graduate with a bachelor's degree. The remaining 10,000 were equally split between postgraduate and subdegree programs and those students who, because of the modular nature of study, chose not to declare their intended qualification. Beginning in April 2002, the number of students studying by distance education started to show a steady decline until, by October 2004, there were just under 20,000 active students. The university was forced to consider diversifying its market and exploring other sources of students.

Until 2001, the university had been wholly dedicated to the provision of courses by distance education (with the exception of the university's professional and continuing education arm, the Li Ka Shing Institute of Professional and Continuing Education which offers traditional part-time adult education opportunities in classroom mode). In October

2001, it took the bold step of offering the first of a series of associate degrees by full time face-to-face study. With this move into face-to-face tuition, the OUHK also became a player in the traditional school-leaver market, having previously focused solely on adult students. Since its inception in 1989, the Open University has been the only provider of continuing adult education mandated to award its own degrees. In October 2003, the university took advantage of this one remaining competitive advantage over the community colleges and schools of continuing education of the other universities by offering full-time bachelor's degree programs specifically designed to offer a route to a full degree for those students completing an associate degree. This not only offers a ladder of opportunity for OUHK full-time students, but also allows those students completing an associate degree elsewhere in Hong Kong to extend their studies to bachelor's level. It represents an important market niche as the majority of associate degree graduates in Hong Kong will not be able to secure funded bachelor's degree places in the other universities, where the number of places they can offer at an affordable price is constrained by their delivery methods and funding regime.

The OUHK's full-time programs use existing distance learning materials as course resources and maximize the daytime use of campus facilities. They have been quite successful and, as of October 2004, there are over 450 full time undergraduate students registered with the OUHK. The university is currently exploring the possibility of offering mixed-mode degree programs that will allow students flexibility to study modules either by full-time classroom-based study or by distance education, providing a fully flexible study pattern that students can mix and match to suit their own particular circumstances at any time in their study career. As part of this initiative, the university will also market the established quality of its teaching and library resources, its provision of online access to all administrative systems, and its highly-developed local student support model as a guarantor of the qual-

ity of the learning experience whatever the chosen mode of study.

The OUHK's venture into full-time education is an example of the global phenomenon of convergence between the face-to-face and distance modes and the emergence of flexible or blended learning as institutions seek to harness the power of Internet technologies to enrich curricula and manage course delivery costs. It is mirrored in Hong Kong by the cyber-initiatives of two of the government funded universities.

In August 2000, the Hong Kong Polytechnic University established the HKCyberU, aimed at "helping working adults to pursue quality and professional education with maximum flexibility, practicality and convenience despite their busy and hectic lifestyle" (Hong Kong CyberU, 2004). The programs offer a blended mode of teaching combining online materials, bulletin boards, online tutorials, and classroom-based tutorials. The majority of programs are at postgraduate level and focus on information technology-related subject areas such as information systems, software technology, and knowledge management.

City University of Hong Kong offers an interactive MBA (iMBA) in partnership with Pacific Century Cyberworks (the privatized and renamed Hong Kong Telecom). This program is delivered via broadband Internet and has Web-based interactive discussions on course topics facilitated by online tutors. Hyperlinked multimedia course materials are accompanied by videos of course lectures that are available through streaming technology.

Technological development is acknowledged to be one of the major drivers for the expansion of distance education delivery globally in the past decade. The OUHK started to pilot its Online Learning Environment (OLE) using WebCT in April 1999. The initial pilot consisted of nine courses (approximately 5% of the total) in the English language. The provision of an OLE for Chinese language courses presented some technical difficulties for the university and four Chinese courses with online components were offered for the first

time in April 2000. In April 2004, the university piloted a new bilingual OLE platform (Domino). By October 2004, all courses using OLE had migrated to Domino and the number of courses using OLE had grown to 196 (or 88% of the total). This technological breakthrough has facilitated the expansion of the OUHK's own ventures into international education on the Chinese mainland.

In the run-up to 1997, every organization in Hong Kong realized the importance of linkages with the People's Republic of China. In 1995, the Open University had to start from scratch because distance and open education as it was practiced in Hong Kong was practically unknown in Mainland China. Hong Kong's status as a special administrative region of China confers no special privileges on its institutions, so the OUHK began in 1997 to launch certain programs (at the postgraduate level) in partnership with mainland universities and professional organizations.

The first programs to be offered on the mainland were the MBA (Chinese) and the postgraduate certificate in business administration (Chinese). These programs have now been followed by a master of education in distance learning program, in fulfillment of the university's objective to transfer its expertise in open and distance adult education to the mainland and beyond (Tam, 1999, p. 104).

As many organizations will recognize, operating in Mainland China is not without its challenges. In addition to sourcing a suitable partner, there are problems associated with logistics, ownership, and the maintenance of quality. The Open University has fought hard over the years to establish the integrity of its assessment processes as a fundamental indicator of the quality of the degrees it awards. In order to ensure the security of the examination process in its Mainland ventures, the university sends its own staff to oversee the examination operation. These additional quality assurance mechanisms add significantly to the costs associated with running the operation, but are deemed necessary to its long-term sustainability in a market in which the cowboy

operators unfortunately continue to thrive and prey on the unquenchable desire for learning that characterises the huge Mainland educational market. In 2003, the number of OUHK graduates in Mainland China was 1,240.

Since October 2001, Mainland students have been able to access the OLE platform that was set up on a Hong Kong-based server. The speed was slow and mainland students were unable to participate in the discussion board, as they were only given a guest account to enter the system. In addition, the Hong Kong system uses traditional Chinese characters rather than the mainland system of simplified characters. In October 2004, an OLE platform was set up on a mainland server using simplified characters. No data on usage are yet available.

In January 2004, the secretary for education and manpower (SEM—Hong Kong's minister of education) announced his vision that Hong Kong should aspire to become "the education hub of the region" in light of its strong links with Mainland China, its geographical location, its internationalized and vibrant higher education sector, and its very cosmopolitan outlook (University Grants Committee, 2004, p. 5). Current indications are that the government is very close to achieving its target of a 60% participation rate in postsecondary education by 2010/11 (EMB personal communication). Thus, while the SEM perhaps focused more on attracting increasing numbers of overseas and mainland students to participate in Hong Kong's expanded higher education system, it is clear that distance education will have a significant part to play in exporting Hong Kong education to its neighbors. The Open University was established in 1989 in part to staunch the flow of young talent from the territory in search of educational opportunities overseas. Its pioneering work did much to overcome the prejudice against distance education that existed in the territory at that time and to promote a flexible learner-centred, resource-based educational paradigm in a society traditionally more at ease with an authoritarian, teacher-centred approach. Its current focus on developing courseware and learning

support systems in the Chinese language should enable it to make a significant contribution to solving the much more intractable problems of access, cost effectiveness, and flexibility facing Hong Kong's huge neighbor to the north.

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