1. Let me begin by congratulating the Open Learning Institute of Hong Kong on this magnificent occasion when you take possession and ownership of your new campus. The council, staff, students and the community of Hong Kong can take pride in the fact that each group has made its contribution in one way or another in making this campus a reality. Many of you here today will recollect the difficult days of long ago when the very need for and the viability of this institution was questioned and at stake. You have come a long way, since then, as an educational provider for those parts of your community which desperately need such opportunities. Your confidence in what you do and the way you are doing it are testaments to the human spirit which, despite adversity and impediments has that capacity to innovate, design and accomplish tasks to which it makes a commitment; in your case that commitment is to provide access to education to the people of Hong Kong regardless of gender, age, prior educational experience and social background. On behalf of the Commonwealth of Learning, I bring you greetings and well wishes and congratulate you on your achievements. You also have, I am sure, the well wishes of the distance education community of the world as you progress from here to an equally exciting future ahead of you.

2. The organisers of this seminar invited me to speak on the present developments and future trends in Education as we prepare for the new millennium. Those of you who know me well enough also know that while I am modestly familiar with the former, I am not very good at the latter, i.e., soothsaying, and the few times that I have attempted doing
this seemed to confirm my self assessment of a singular lack of this talent. But, there are some very clever people out there in the big world who, with their computers and uncanny foresight, are predicting the developments in industry, technology, communication, commerce, environment, population, governments and humanity's knowledge base. Using their wisdom, I will attempt to speculate on some new directions for education generally. Together we could also look at what entails for distance education, particularly, if indeed such a dichotomy continues to exist in the coming millennium.

3. The development of Distance Education and Open Learning has been variously described as a response to increased demands made upon the educational sector by population growth and economic necessity. The first has led to enormous pressures on educational systems to make bigger and better provisions for access without an equivalent increase in the cost of delivering that education while the latter has been driven as much by individual ambitions as national desires to become rich and powerful. It has become an axiom to link personal wealth, prosperity, welfare and health to levels of educational attainment of individuals and societies. Reports coming out of the UNDP, United Nations Population Fund, OECD, UNESCO and other similar organisations invariably argue for more, better and different kinds of education if nations and individuals want to be competitive in the coming decade. Taking my cue from these many studies and your request, this presentation is divided into three parts. They are:

part i: Some demographic and socio-economic conditions as they affect open learning.

part ii: Present international practise in open learning.

part iii: Emerging issues and challenges.

PART 1: Demographic and Socio-Economic Conditions

4. Almost every projection that has been made so far seem to confirm the fears of Ehrlich and others that the population of the world will continue to expand over the next ten to fifteen years at an annual average rate of about 1.6%; in 1993 the world population was at 5.5 billion; by the year 2000, it is expected to reach 6.2 billion and the year 2050 will see population figures around the 10 billion mark (Table 1).

Table 1: Projected Changes in the World Populations (numbers in millions)

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<tbody>
<tr>
<td>World Total</td>
<td>5,295,300</td>
<td>5,759,276</td>
<td>6,288,254</td>
<td>6,688,159</td>
<td>7,149,499</td>
</tr>
<tr>
<td>CAGR</td>
<td>1.7%</td>
<td>1.6%</td>
<td>1.4%</td>
<td>1.3%</td>
<td>1.3%</td>
</tr>
<tr>
<td>More Developed</td>
<td>1,211,138</td>
<td>1,244,176</td>
<td>1,277,963</td>
<td>1,310,427</td>
<td>1,340,532</td>
</tr>
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</table>
Table 2: Projected Changes in the 15-24 Year Old Population (numbers in millions)

<table>
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<tbody>
<tr>
<td>World Total</td>
<td>1,014,940</td>
<td>1,031,809</td>
<td>1,070,638</td>
<td>1,159,319</td>
<td>1,240,839</td>
</tr>
<tr>
<td>CAGR</td>
<td>0.3%</td>
<td>0.7%</td>
<td>1.6%</td>
<td>1.4%</td>
<td></td>
</tr>
<tr>
<td>More Developed</td>
<td>180,760</td>
<td>177,252</td>
<td>175,345</td>
<td>175,800</td>
<td>174,967</td>
</tr>
<tr>
<td>Regions</td>
<td></td>
<td>- 0.4%</td>
<td>- 0.2%</td>
<td>0.1%</td>
<td>- 0.1%</td>
</tr>
<tr>
<td>CAGR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Developed</td>
<td>834,179</td>
<td>854,566</td>
<td>895,293</td>
<td>983,520</td>
<td>1,065,872</td>
</tr>
<tr>
<td>Regions</td>
<td></td>
<td>0.5%</td>
<td>0.9%</td>
<td>1.9%</td>
<td>1.6%</td>
</tr>
</tbody>
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CAGR: Compound Annual Growth Rate (for previous five-year period).


The growth, however, will not be even. Highest growth rates will be encountered in the poorest of countries while in the rich and industrialised countries it will remain stable and may even show a minus growth. By the end of the century, according to UNESCO, the share of the developing countries in the population pool will be around 95%. There is also another twist to these statistics that has an impact on education and this is the structure of the population itself. The richer but slower growth countries are also those that are ageing - in these countries, the proportion of the over 65 years of age are increasing, going up to about 19% by the first quarter of the next century while in the developing parts of the world the numbers of the young (those below 15) will explode (anything up to 1.2 billion by the early part of the century, Table 2). We should remember this in the context of our discussion. It is the poorer countries with large numbers to be educated also that currently have the least provision for education both qualitatively and quantitatively; a short supply of teachers, books, library and laboratory facilities and many other necessary infrastructures needed for good education.
Regions
CAGR

CAGR: Compound Annual Growth Rate (for previous five-year period).


5. Even as we approach the 21st century, access to all levels of education in the poorer nations of the world continues to be appalling. Roughly, 960 million or about one-fifth of the world's population is still illiterate; a further 900 million (another fifth) can read and write but are, for all intents and purposes, functionally illiterate; a further 700 million may have, at most, a mid-secondary level education making it difficult for them to aspire for anything more than low-skilled jobs and wages. The situation is even more depressing when you take into account that up to two-thirds of these groups are made up of girls and women.
Fig. 1: The Evolution of the Age-Structure of the World's Population, 1980-2010 (percentages)

Soviet Union are considered as developed countries, and those that are in Asia are also included there.

Figures compiled by UNESCO's Division of Statistics. The regions correspond to UNESCO's nomenclature. The countries of the former

6. While the poorer countries face the challenge of illiteracy, under education, under supply of education and quality of education, on the other end of the scale the challenges of the richer nations are equally daunting. Their major (educational) concerns are centred around unemployment of the young, under employment, the long-term unemployed, functional illiteracy, new migrants, isolated and marginalised communities and provisions for the chronologically old but mentally alert parts of their population.

7. There is yet another aspect of the demographic picture that needs to be taken into account as we scan the environment in which distance and open education is and will be placed. This is the level of educational attainment of the world's populations. Whilst we bemoan the fact that illiteracy and semi-literacy is on the increase, it must also be recognised that over the last quarter of the century remarkable progress has been achieved in educational provisions world-wide. Participation rates at primary, secondary and tertiary levels have increased, especially in the developing parts of the world. It is estimated that some one billion are currently in school (compared to about 300 million, 50 years ago), and it is predicted that a significant number of them will seek opportunities for further education (Table 3). Using present growth trends, it is possible that some 150 million more post-secondary places, in addition to the present 60 million, will have to be created in the next 25 years or so to meet this new demand. The demand will come mostly from the developing parts of the world.

Table 3: Rates of Education Participants by Level (World Totals), 1970-1990

<table>
<thead>
<tr>
<th></th>
<th>First Level</th>
<th>Second Level</th>
<th>Third Level</th>
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<tr>
<td>1970</td>
<td>89%</td>
<td>36%</td>
<td>8.5%</td>
</tr>
<tr>
<td>1990</td>
<td>99%</td>
<td>50%</td>
<td>12.7%</td>
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8. The ‘demand’ picture is also confounded by a global recognition that education does not necessarily stop with an initial qualification but is a continuous lifelong activity. This means that educational providers must be able to not only provide basic education to 18-year olds but also make provision for the regular updating, extending, upgrading, supplementing and broadening the skills and knowledge that are needed for productive work places and participatory citizenship. Some 80% of today’s workforce, about 2 billion people, can be expected to continue working well into the first quarter of the next century. Meeting the educational needs of such people will require us to question the paradigms of present practice of a space and time sensitive, institution centred curriculum and assessment systems. In North America and large parts of Europe, part-time learners now outnumber full-time learners and their educational needs and expectations of measuring its outcome is beginning to appear in the political agenda of many governments.
9. Bill Gates, in his book The Road Ahead, said "We are all beginning another great journey. We aren't sure where this one will lead us either;" he is one of many in our generation who has expressed this view. We are the first generation that know for sure that we do not know what the future would be like. Frequent career changes are becoming a familiar phenomenon and with these changes come the need to learn new skills and acquire additional abilities. The rapid pace of technological changes has convinced nations and businesses of the need to have flexibility in the quality of the labour force. This requires not only keeping abreast of technological changes but even ahead of them. A recent UNESCO Report considers them as evolutive skills which are tied in with knowledge and know-how. Educational institutions, therefore, can no longer contend themselves with training a labour force for stable industrial or even agricultural jobs, instead, they must train individuals to be innovative, capable of evolving and adapting to a rapidly changing world of work.

10. The direction that education will take as we near the end of this century may therefore be governed by a number of forces, but three may stand out to be critical. They are:

. A diversity of participants (or learners) in the activity: schooling will not be limited to those between 5 and 24. Education and training will be of potential interest to all individuals at all stages of their lives, i.e. from literacy courses to those wanting to enter the University of the Third Age;

. A diversity of goals: learner of choice will study for a variety of reasons and objectives, learners will make decisions on what they want, whether it is for skills enhancement or intellectual development; and

. A diversity of contexts: full-time study within the time-tabled constraints of the classroom is only accessible to a few; for the many who wish to study, learning will have to happen at a time and place of their personal choice.

11. As the nature of demand changes so does the nature of supply. Increasingly, schools, colleges and universities are devising curricula, delivery methods, assessment and award-making to recognise the new learners and their needs. Three major changes will become noticeable. These are:

. Changes in Institutional Framework: forced mostly by demographic changes, many institutions will become open to non-traditional learners, offering a wide variety of flexible duration and allowing students to move freely off- and on-campus. Private providers will begin to compete with publicly-funded institutions for students;

. Changes in Technological Framework: the arrival of faster, versatile, bigger and interactive world-wide based technologies will have the potential to become the backbone for teaching and learning transactions. The potential for low-cost 'real time' communication between any groups of people from anywhere in the world using video, audio and written modes will allow educators to deliver knowledge and skills as effectively as traditional delivery methods; and
Changes in Financial Framework: governments will no longer be nor will they afford to be the sole financiers of educational ventures. Coupled to this will be the demand for governments to loosen control of the educational process.

At least in my mind, ladies and gentlemen, the direction that a larger part of education will be moving towards in the next decade seem to have had its beginnings some three decades ago. Those of us who have been promoting distance and open learning and have been sitting on the side lines of educational ventures will recognise the flexible student centred, technology assisted, user paid nature of our practice. If indeed this is the future direction of education, let us take a look at where it is today.

PART II: Present International Practice in Open Learning

12. It is said that, globally, between 10 and 20% of all participants in post-secondary education do so through the distance mode. Pushed by a desire to open up access on the one hand and pulled by the need to economise, distance education has become one of the fastest growing sectors in the world of education, very often transcending both the formal and non-formal dichotomies. The form and shape of the practice as well as the nomenclature used in describing it is limited only by the enthusiasm and imagination of those practising it - flexible learning, multi-channel learning, off-campus programmes, external studies, correspondence education, radio and tele-education, home study, zachony - as the Russians would have you know it, fernstudium - the German equivalent, the distributed classrooms of North America, and in keeping with the emergence of the cyberculture, the virtual universities are beginning to appear wherever you find a guru, a server and a computer. In one way or another, these institutions seem to address one, a few or almost all of the following demands of their communities:

- balancing past inequalities to access;
- offering a second chance;
- mass education and training; and
- educating rural and marginalised groups.

13. More than any other continent, the nations of sub-Saharan Africa present the most glaring evidence of the gaps between those who are educationally well provided for and those who are not. In the 1996 Human Development Report, it was stated that roughly half the children who entered Grade 1 finished Grade 5 (a 50% wastage rate) and some 80 million boys and girls are still out of school; at the tertiary level in the well-off parts of Africa there are perhaps 2,100 university students per 100,000 head of population and in the worst-off less than 16. It is therefore inconceivable that neither local resources nor international assistance will be able to meet the demand for education using conventional delivery methods. For most of sub-Saharan Africa, educational opportunities can only be satisfied by the use of distance education. There is a long tradition of distance education in many of the African countries in almost every sector of education. UNISA (The
University of South Africa) claims to be the largest and oldest of the dedicated distance teaching institutions in the world. Besides UNISA, the Technical College of South Africa (TECHNISA) - pre-tertiary technical education - also provides technical and trade related distance education in the country. Further north, the Republic of Tanzania has an Open University, Zimbabwe and Malawi are planning theirs. There are also numerous departments of external studies offering a variety of courses and programmes leading up to formal qualifications. A number of NGO’s, notably INADES Formation, has a pan-African character delivering non-formal education using distance education methods.

14. Distance education in Africa is very much at the basic level; print continues to be the main vehicle for delivery in the formal sector, and print and radio play important roles in the non-formal sector. Even at entry level, good practice in distance education requires trained academic and support staff, reasonably equipped study centre facilities, functioning postal and communication systems and political commitment at the highest level. There are pockets where all of these come together and systems work well, but by and large inadequate human and physical infrastructure result in poor materials, unsatisfactory distribution systems, inadequate student support resulting in massive dissatisfaction all round. Despite these difficulties, distance education has shown persistence, and recent initiatives by governments and international agencies are making more central to educational delivery on the continent.

15. Australia has one of the world's most comprehensive educational system with almost total participation at primary school level and gradually diminishing to between 6 and 10% at the post-secondary level. Despite the uncertainties of a few years ago, there is a major resurgence of interest in distance education. One also sees the greatest diversity of practice in distance education here with a great tradition of taking education to widespread and isolated communities, and in recent years the Australians have been among the most aggressive vendors of educational products both in their own vicinity as well as (almost) pan-globally. It is difficult to predict where distance education will move towards in this country. There is no single award granting institution that is totally dedicated to delivering education at a distance; a multitude of technical and further education colleges, universities, professional associations (engineering, accounting, medicine) are all engaged in some kind of distance education programmes. Open Learning Australia, established some five years ago, acts as a publicist, promoter and broker of distance education courses of/for its members at the post-secondary level, however, it does not create its own credit granting courses. Given Australians love of and for technology, one can anticipate a lot of activity in wanting to go 'virtual'. Some remarkable experimental efforts in the use and application of multimedia and other emerging communication technologies which are underway are worth tracking. The concern in this country is not about human capacities and talents (there are plenty); it is not even about fiscal resources (though, there is some concern here); it is more about a lack of co-operation among co-ordinating practitioners, fragmentation of efforts and provisions and unnecessary competition. One suspects a great loss of choice and flexibility for the users of this educational provision.
16. Educational provision and participation in New Zealand show some similarities to their neighbours, but the situation is totally different among the Pacific Islands Group of 13 different countries, 60 cultures and about 1.5 million people in total. The University of the South Pacific has been and continues to be the main provider of distance education for the past 25 years. The concern here is the absence of adequate indigenous capacity to sustain the continuance of this programme should external aid cease.

17. Distance education is firmly established in Latin America and to a certain extent in the Caribbean. A few years ago, there was concern that chronic under funding, bad practice and dubious status would impede the growth of distance education, the persistence, perseverance and success of a few projects seem to have brought interest in and enthusiasm for distance education in this part of the world. Distance education in Latin America is used for non-formal education, school equivalency programmes, teacher education, higher education and continuing and professional studies. A number of initiatives stand out because of both their innovation and success. These include the Accion Cultural Popular of Colombia, the Telesecundria of Brazil, the University of the West Indies UWIDITE multi-campus external studies programmes, and the Universidad Nacional Abierta in Venezuela and the Universidad Estatdal a Distancia in Costa Rica - the two dedicated open universities of the region. Notwithstanding these successes, the challenges still remain, as, generally there are many initiatives with all the best of intentions, but because of poor funding and lack of trained talent, end up by delivering very poor quality education.

18. In the Middle East, Israel's Everyman's University has been delivering distance education especially in the science and technology areas for the past thirty years. Its multimedia self-instructional materials and use of a wide range of media and support systems have earned this University much respect internationally. Besides Israel, the Al-Quds Open University of Palestine has been operating out of Jordan for the past eight years providing a very modest level of access to school and university level courses for the Palestinian people. Payam-Noor Open University in Tehran, Iran, has well over 100,000 students using its facilitates at under- and post-graduate levels; in Algeria, distance education is beginning to establish a role for itself, while in Somalia and Sudan and in Palestine distance education has been meeting the educational needs of refugees and other displaced persons. Almost all of these systems are print driven with radio and, in the case of Everyman's, video playing a secondary role. Challenges for nations in the Middle East must include taking education to women and girls as well as to some 23 million young people who are out of school and a further 80 million people who are illiterate. The extensive use of mass media technologies for this purpose must be a serious consideration.

19. The continent of Asia is home to the biggest and most complex distance teaching systems in the world. Almost every country in continental Asia has at least one open university, the exceptions being Singapore, Malaysia, North Korea, Afghanistan, the Himalayan states of Nepal, Bhutan and Sikkim and island states such as the Maldives.
Even in those states without open universities, provisions for the delivery of formal studies outside campus walls are available. Challenges to Asian institutions include addressing the needs of some 659 million illiterates, about 100 million out of school children, and many millions of aspirants for post-secondary education, isolated and marginalised communities; issues of quality, use of appropriate technology and funding are also beginning to attract attention at both institutional and governmental levels.

20. The use of technology for the delivery of educational services is supporting the emergence of distance education onto the centre stage in North America. In the USA, hardly a month passes without yet another announcement of a new initiative to take education home to the user. Some 30 million subscribers to the Internet and with substantial amounts of funding from both the public and private purse are attracting a variety of providers for Cyber surfers. It is still too early to predict where all these hype will lead to. Perhaps, we are really seeing the beginnings of virtual university systems with a truly new form of knowledge creation, delivery and learning.

21. However, Canada, which is just as well provided as the USA in terms of delivering post-secondary education outside campus walls, has a long tradition with many of the older universities actively engaged in the venture. Despite this, most provinces also have at least one institution dedicated to distance education. Athabasca University in Alberta and the Open Learning Agency in British Columbia are known to many of you here for their excellent work in the field. Recent years have witnessed some ruthless trimming of educational budgets by governments confronted with massive deficits. This, along with concerns of ageing populations and shifts in the economy seem to stimulate interest in the delivery of education by non-traditional mechanisms. Given the country's active telecommunication industry, Canadians are engaged in a variety of discussions and debates on the pros and cons of telecommunication driven education. Like most others in a similar situation, the potential of the technology seems far greater than the ability of instructors to use that potential.

22. I would like to conclude this part of the presentation with a short statement on dual mode institutions. It would not be incorrect to say that long before the arrival of the dedicated distance education institutions, many colleges and universities across the world have been providing access to off campus learners; many still do, especially in India, Malaysia, Canada, Australia, the USA and increasingly the UK. In India, there are more students learning at a distance through conventional rather than open universities; in Malaysia, all public-funded universities are being encouraged to become dual mode. With the growing nature of the educational demand, the opportunity to develop a new source of income, the increasing versatility of the newer technologies and a desire to demonstrate efficiencies, it is likely that during the next few years, a large part of the tertiary sector will be engaged in delivering instruction to non-campus-based students. Should this happen, would there be any merit for open learning institutions to see themselves as different from any other educational provider? Let us look ahead.
PART III: Emerging Issues and Challenges

23. In a report written for the OECD, my friend Bill Renwick had this comment to make: "Particularly in countries where they depend heavily on public funding, universities are unlikely to be able to rework the trade off between research and teaching as if they were solely for their own untrammelled decision. They face the twin specters of more students and tighter funding regimes. Governments have a heightened concern for the efficient use of scarce resources and value for money from what cannot avoid being the most expensive sector of national educational systems. The quality of learning and teaching and how to improve it, and how to make it available to a larger, more diverse student population is thus an essential part of the policy agenda for face to face as well as distance teaching institutions. One of the questions being asked is how far excellent face to face teaching and excellent distance learning derive from the same pedagogical principles even though they might employ them differently. Another question is how far excellent teaching and learning in both modes can be supported, enhanced and made more effective (in both the educational and economic sense) through the judicious use of information and communication technology." The future for those who have a vested interest in this subject boils down to four fundamental things. They are the learners, the curriculum, the technology and the capacity to manage this change. Very briefly, I will visit these in the next few minutes.

24. The New Learner requiring the services of educational institutions will be different from the one we are serving now. In terms of both prior knowledge and skills, we are going to be confronted, on the one hand, by individuals who will be comfortable and competent with using the tools of the knowledge century and, on the other hand, with people who will need basic literacy and numeracy training. It will be a mistake to presume that these two groups will fall neatly into the north-south, rich-poor or developed-developing nations dichotomy. Every community will have different users and educational providers must prepare themselves to provide access to both groups. Technology, rather than being an impediment, will be an asset in meeting this challenge. In most cases, the majority of the new learners will also be learners of choice who will expect to pay for the service and in return demand that the service be provided efficiently, effectively and skilfully; in this, they will have the backing of their political representatives and governments. The new learner will also expect to be mobile and to be a global worker and citizen, and this will require that he or she has the skills to work in multicultural teams. Institutions of learning will be expected to provide them with these skills.

25. Providing skills for the 21st century learner will require a curriculum that recognises universal interdependency, thus enabling people to understand themselves through a better understanding of the world. I believe that these social and professional skills must be the core universal objectives which college and university curricula must incorporate. In the recently published Delors Report, the UNESCO Commissioners called for four pillars of education which would form the basic framework of a global curriculum. These are:
. Learning to know, by having a broad overview of things and the skills to work in depth on selected fields; learning to learn and thereby benefit from the opportunities to learn throughout life;

. Learning to do, by acquiring vocational skills and the competencies to work in different situations and to work in teams;

. Learning to live together, and appreciating other cultures and people, respecting pluralism, peace and managing conflict; and

. Learning to be, so as to better develop one's own personality, acting with autonomy, judgement and personal responsibility.

26. The call for curricula reform is not a new one. Political forces, governments, international agencies, non-governmental organisations, professional fraternities have all been pleading with the educational community, especially the post-secondary sector, to produce graduates suited for life outside campus walls. It seems to me that in the next few years this demand will become even more greater. The forces outside the campus walls may eventually force the powers within the campus walls to examine their curricula, and to meet users needs rather than perpetuate the traditional practice and belief that academic freedom and autonomy do not allow a say for the consumer to demand that what is relevant, good and desirable for him or her and their communities.

27. Providing learning to diverse groups of individuals separated by space, time, prior learning skills and new training requirements will need an infrastructure that is global in reach, interactive in nature and affordable in cost. Institutions preparing to deliver education in the 21st century will begin to make greater use of technology in their teaching and learning, than today. Though it is unlikely that access to computing and communication technologies will be within the reach of ALL those who aspire for an education in the remaining five years of this century, one can only be optimistic in one's belief that as we progress into the 21st century accessibility will become more universal than today (Fig. 2). The technology industry has a history of making the software friendlier, hardware cheaper and operations inexpensive at every stage of its development. There is no reason to doubt that this trend will not continue (Fig. 3).
fig. 2: Computers for 100 People in Selected Countries, 1995

Source: The Economist, September 28th - October 4th 1996.

fig. 3: Information Processing and Telephone Costs between 1975-1995

Source: The Economist, September 28th - October 4th 1996.

28. The institutions of the 21st century will demand a lot from their leadership. Not only are they expected to be scholars of high standing but also excellent managers balancing the difficulties of a rapidly changing academic environment. They have to be active strategist with the ability to inspire and win commitment, earn respect by being ethical, open and empowering. Institutions will have to be entrepreneurial and, like any well run
business, the leaders who manage them need to have a great concern for their clients, workers and the quality of their products and services.

29. Finally, Mr. Chairman, putting the last 40 minutes together, let me conclude by drawing the seminar’s attention to a study published last year by the OECD where it drew the attention of its members to six principles which will dictate learning in the 21st century. These are:

(i) Learning in the 21st century will become the essential part of everyday human activity;

(ii) Access to learning in the 21st century will need to become as near universal as possible;

(iii) Learning technologies in the 21st century will need to respond flexibly to learner needs;

(iv) Learning suppliers in the 21st century will need to adapt their ways to meet the changing demands of their clients and to maximize the potential of new delivery techniques;

(v) Governments in the 21st century will need to play an active role in supporting the learning infrastructure, but should not attempt to control the learning agenda; and

(vi) Learning in the 21st century will need to be a collaborative enterprise.