

Globalisation Qualifications and Livelihoods

Report Number 19

The Supply of UK Qualifications to
Sri Lanka and Zimbabwe following
Economic Liberalisation

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Preface

This research report is one of a series completed within the DFID-funded research project 'Globalisation, Qualifications, Livelihoods and Youth'. The research examines the impact of globalisation on livelihoods, education and qualifications, and on the aspirations of youth for education, qualifications and livelihoods.

The research arises from the need to monitor the impact of globalisation – operationalised via policies of economic liberalisation – on the access of the poorest social groups to livelihoods, education and qualifications in different country contexts. Economic liberalisation is changing the nature of the livelihood structure and the economic demand for skills and qualifications. It is also changing the types of educational and qualifications provision within specific national settings. These in turn impact on the aspirations of youth for livelihoods, education and qualifications. The realisation of those aspirations is increasingly conditioned by the ability to pay, as policies of economic liberalisation encourage private sector, market driven provision, especially at the post-primary level. This research explores the impacts of economic liberalisation on the structure and volume of livelihoods, education and qualifications on the one hand, and on the aspirations of youth, on the other. In particular it seeks to explore differential impacts of economic liberalisation on members of different social groups.

The fieldwork has been undertaken mainly in Sri Lanka and Zimbabwe. A smaller study was undertaken in Zhejiang Province, China, and a study of UK suppliers of qualifications to Sri Lanka and Zimbabwe was undertaken to explore the interdependent, cross border nature of qualifications supply.

Research Report no 19, by Angela Little and Jane Evans of the Institute of Education, University of London, examines the orientations and practices of UK-based suppliers of qualifications to Sri Lanka and Zimbabwe in the current period. The study is based on interviews with representatives of the Qualification agencies and on their published documentation.

This research was supported by DFID. The views expressed are those of the author and do not necessarily represent DFID's own policies or views. Any discussion of the content should be addressed to the author via the email address listed below.

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UK Qualification Suppliers

1.0 Introduction

The Globalisation, Qualifications and Livelihoods research project focuses on the impact of economic globalisation on qualifications and livelihoods in developing countries, specifically Zimbabwe and Sri Lanka. However, it is apparent that changes in the supply of qualifications and qualification structures involve foreign qualification suppliers. Traditionally, both countries have had strong links with the UK, especially during the respective colonial and the immediate post-independence periods. In Sri Lanka the reliance on UK qualifications diminished in the period up to 1977. In the period since economic liberalisation, post 1978, qualification suppliers from UK and elsewhere (especially Australia) have traded in Sri Lanka. In Zimbabwe, with a more recent post-independence period (post 1980) and even more recent post structural adjustment period (post 1990), some qualifications are being nationalised. Internationally, qualification suppliers from UK continue to function but under increasingly difficult economic conditions and compete with suppliers from the South Africa.

The four broad questions that frame the research for this study are

Research Question 1: What is the impact of policies of economic liberalisation on livelihood structures?

Research Question 2: What is the impact of policies of economic liberalisation on qualification structures?

Research Question 3: What is the impact of policies of economic liberalisation on education structures?

Research Question 4: What has been the shift in the education, qualification and livelihood aspirations of youth?

The purpose of this small study is to understand the supply of qualifications in Sri Lanka and Zimbabwe from the perspective of UK qualification suppliers. The study of UK qualification suppliers contributes to Research Question 2, specifically to the following hypotheses:

Economic liberalisation has led to:

An increase in the volume and type of vocational qualifications offered by foreign, national and local qualification bodies

An increased demand by employers for qualifications for recruitment to skilled jobs in English, commerce and information technology

An increase in the volume and proportion of entries to international or metropolitan-based academic qualification bodies

An increase at the higher education levels of franchise arrangements with foreign universities and 'distance' courses offered by them

In this research UK Qualification suppliers explain the types of qualifications they supply, how they supply them and shifts in their perceptions of demand for qualifications. Since few employees hold the institutional memory over the extended periods of time addressed in our main study we are limited to perceptions of change in operations over the more recent past. In the longer term we are relying on evidence garnered from documentary sources and the straightforward evidence offered by whether the qualification supplier was in the business of offering qualifications or not. As we are studying only a small number of cases of UK suppliers and none from other countries the evidence we have provides only a handful of perspectives. It cannot provide a general picture of the qualification sector as a whole. Its merit lies in understanding the detail of supply decisions in response to demand and the nature of provision and in how the same UK supplier adjusts its operations to the exigencies of different country contexts.

The study contributes to the other three Main Research Questions indirectly. UK qualification suppliers respond to the demand for qualifications that in turn reflect shifts in livelihoods. Qualification Suppliers provide corroborative evidence for changes in the shifts in livelihoods (Research Question 1). Because qualifications are linked with types of education and training provision the study provides corroborating evidence for the answers to Research Question 3. UK qualification suppliers have subjective perceptions of the aspirations of youth. As such these provide corroborating evidence for Research Question 4.

It is important to note that the economic liberalisation policies introduced in Sri Lanka in 1978 and Zimbabwe in 1990 revolved around trade in goods and the removal of tariffs. In neither country did those policies focus specifically on liberalisation of trade in education services. Nonetheless policies that affect the structure and volume of livelihoods will have an impact on the demand for skills and qualifications. Secondly, the removal of trade barriers can open up possibilities for inward investment in the education, training and qualification field.

World Trade Organisation General Agreements on Trade in Education Services are only now, in 2003, moving to the level of policy in a few specific national contexts. Nonetheless some trade in education services between countries is and has been ongoing for a considerable period of time. Hence our case studies address the question of qualification supply in the period after WTO agreements on trade in goods and before any agreements on trade in education services. It is significant that none of those interviewed in our qualification supply organisations was aware of GATS.

2.0 Sample and Methods of Study

The selection of the sample of UK qualification suppliers was driven by the presence of their operation in either or both Sri Lanka and Zimbabwe, types of qualification (academic, vocational, professional) and Educational Level. Consideration was given to categorising using the scheme provided by ICSED, but this proved to be very multifaceted for the small sample size. Thus, the educational levels are expressed as Level 1 Primary education, Level 2 secondary education and Level 3 Post-school education and qualifications. The research teams in Sri Lanka and Zimbabwe identified current UK qualification suppliers and the types of qualification on offer. These lists are provided in Annex 1. These lists were analysed by the UK team and suppliers identified, largely through information provided in the adverts and websites. The selection of sample cases was guided by the principle of maximal variation. Variation was sought on the two dimensions (i) type of qualification (academic, vocational, professional) and (ii) level of qualification (Level 1-primary school, Level 2, secondary education, Level 3 post-school). The final selection of cases was classified as follows:

Table 1 Selection of Cases of UK Qualification Suppliers

Supplier	Qualification Type and Educational level					
	Academic		Vocational		Professional	
	Sri Lanka	Zim	Sri Lanka	Zim	Sri Lanka	Zim
Supplier A	1,3	3			3	3
Supplier B		2			3	3
Supplier C	2		3	3		
Supplier D					3	3
Supplier E			3	3	3	3
Supplier F			3	3		
Supplier G	3	3				

As we can see from Table 1 all suppliers operate in both countries. The majority of qualification suppliers, when approached, were willing to be interviewed. Types of question were provided in advance in the interview and commercial confidentiality was promised. Other providers that had agreed to be interviewed were mentioned as a guide and an outline of this part of the research was given. Only one qualification supplier proved elusive; they were anxious to be seen as a global and not as a British supplier in the Zimbabwean context.

Their perception was that taking part in an interview would adversely affect their market in Zimbabwe because of current political opposition to perceived British influences. Although a significant supplier in the field and referred to by other suppliers, they were not therefore included in the survey.

Interviews were semi-structured, the structure being provided by a checklist of questions around which interviewees were invited to talk. The checklist is provided in Annex 1 and provided the basis for the case studies. The information from the interviews was supplemented with information from Web sites and other documentary sources.

3. The Case Studies

3.1 Supplier A

Short History/Background

Supplier A began its operations in 1966. It was established by the UK government with a view to developing computer use in the UK. It gradually became a commercially viable organisation in its own right and government funding was no longer required. Supplier A has business links with IT education companies in Singapore.

Types of Courses and Qualifications

Supplier A offers a range of qualifications in Information and Communications Technology. These include basic level computing qualifications (an introduction to using a computer), International Computer Driving Licence, computing examinations at Diploma, advanced diploma level. The Supplier has links with several UK universities for Bachelor, Master's and PhD level qualifications in computing. The courses leading to the qualifications combine academic study with practical computing applications. They combine business and management skills with technology skills. Qualifications are described as 'combining immediately employable skills with academic rigour'. At the opposite extreme of the qualifications range the supplier offers learning materials and certification for children aged 4-16 years. For this Computer Pioneer course the children can study at school or at a special centre after school or attend a school vacation course.

The Supply of Courses and Qualifications

Qualifications in Sri Lanka are managed from Dubai and in Zimbabwe from Cape Town. The exams and processes are administered in England. The exams are set and marked in the UK. There is an examination board consisting of external examiners from Higher and Further education establishments in the UK examining the diploma level qualifications and above. Some script marking has now moved to Malaysia and South Africa. Tuition centres in each country offer the exams and a regional moderator verifies procedures, resources, equipment and administration. Delivery is flexible and suited to the needs of the students of a given tuition centre. Centres might also make use of links with industry. Tuition centres are accredited partners and everything is supplied to them to carry out courses and run exams, for which they pay a royalty.

The supplier's infrastructure is described as operating on a global basis to global standards. Diversity is taken into account and exams are said to be carefully fine-tuned to ensure cultural neutrality.

Course and Examination Delivery

There is a virtual campus for on-line study. This includes automated testing software for some of the courses on offer. In the case of classroom-based study the supplier provides accredited partners with all teaching, learning and examination materials. The accredited partner then provides the face-to-face tuition pitched and differentiated according to the student group. Examinations are organised by the regional moderator. In the case of the degree programme this method is followed to advanced diploma level and then the student follows a third year degree course provided by a university either by attendance at that university, or through e learning, or tutor supported learning in country with an accredited partner operating at a suitable level.

The Demand for Courses and Qualifications

Supplier A is acutely aware of the changes in demand for its courses and qualifications, related to the level of technological infrastructure as well as qualifications infrastructure. Changes in demand for the courses and qualifications of Supplier A are perceived to occur as countries move from being newly developed countries needing basic IT qualifications because there is no infrastructure or existing standards. These qualifications act as building blocks for a country's own qualifications. This has happened in Singapore where the demand has shifted from lower level to higher-level qualifications, for example, Master's degrees. Singapore now has an extensive qualification infrastructure at the lower level. The standard of state education has gone up and the private sector has expanded so "they need us less".

These changes in demand are perceived by Supplier A as a sign of 'market maturity'. Supplier A identifies different marketplaces in Sri Lanka and Zimbabwe. Sri Lanka is described as being at the stage of peak demand for supplier A's qualifications. Zimbabwe is at a midway stage of development. The supplier's largest tuition centre in the world is in Sri Lanka and there is currently a move to offer higher qualifications in Sri Lanka at Master's and PhD level. There is a high level of aspiration among people who can afford international qualifications and currently there is less confidence in the local qualifications. At the same time there are many livelihood opportunities in the ICT sector in Sri Lanka and, while some will use their qualifications to seek opportunities abroad, others will use them in the local economy. Demand for Supplier A's products has increased 'dramatically'. Supplier A perceives the marketplace in Zimbabwe as one where people have no confidence in local qualifications. International qualifications are seen in Zimbabwe as a 'passport to leave the country'. Despite the economic difficulties in Zimbabwe demand is up, although that demand is not always realised.

Supplier A believes that employers perceive its qualifications to be of a higher standard than home qualifications. The supplier claims its qualifications are generally viewed as "more difficult"; both the standards set and the examination are thought by employers to be of a more demanding standard than other comparable level qualifications. In Singapore and Malaysia employers are advertising specifically for candidates with Supplier A's qualifications. Employers appreciate the fact that these qualifications are neither purely academic nor purely technical. The courses are applied IT courses with business elements that respond to industry needs and provide employable skills. Supplier A claims that qualifications fit the skills needs of employers, but also happen to fit into an academic framework, "unlike any of their competitors."

Supplier A believes that from the parents' point of view the qualifications are seen as high quality; they are "paying for the best". This provider has a reputation for reliability and trustworthiness. Parents don't always place that trust in local operators.

Supplier A states that their qualifications do well when there is a strong competitive background, and foreign qualifications are perceived as having a higher status than home qualifications. Eventually they find that the home qualification system is stimulated into providing a better quality of qualification and this is then perceived as better than foreign offerings. This seemed to be based on their experience in Singapore.

In neither Zimbabwe nor Sri Lanka is there enough state provision for young people wishing to take university level qualifications. This provider considers that they meet this deficit in the field of ICT studies.

Marketing/Promotion of Courses and Qualifications

The Qualification Supplier markets its courses and qualifications through an extensive website and attractive print literature.

Website Marketing

There is an extensive web site giving full information on all aspects of international study for this qualification. The qualifications are marketed both to prospective students and to potential tuition centres. The qualifications are described as “The route to global success”. Seven worldwide high achievement awards have been made to students, including one each to Sri Lanka and Zimbabwe. The ‘IT study pathway’ is described. This can lead up to Master’s level and students are able to study through 70 Universities in the UK, Canada, New Zealand, Australia and South Africa. Website links are provided to some of these universities. Links are also offered to three other global ICT training providers (presumably part of the same operation). There are links to universities in the UK, USA, Australia and New Zealand, where the qualifications can be extended from advanced diploma level to first degree and beyond. There is information for ‘accredited partners’ and how to become an accredited partner. This qualification provider provides bespoke examination software for Supplier B’s IT qualifications. A promotional workshop for ‘accredited partners’ is being held in Phuket.

A corporate video of ten minutes duration can be viewed on the web site giving insights into the supplier’s educational approach. For example, “blended learning” is described where the student can mix and match classroom based work distance learning and on-line study and assessment. The video describes how trust and integrity is maintained through a system of moderation and how national standards are adhered to by contact with Ministries of Education, industry and commerce in the countries where the product is available. Rather than imposing the products on countries the organisation states it aims to “listen to the marketplace”. The Internet is seen as the coming area for education in IT. A universal Internet certificate is available. The qualification supplier describes itself as an “e-centric organisation” It stresses the connection between its qualifications and business needs—“IT to make business work”—rather than on the design of software. The training provided is promoted as “vendor-neutral” that is, it is not connected with any one software provider. This is considered an important advantage in a market which is dominated by certain products, because the person with this qualification has transferable and widely applicable skills instead of being tied to one company’s product. This, the video suggests makes a person more widely employable. The qualification is described as a “passport” to many jobs and to any part of the world.

Print Literature

The print literature is glossy, attractive and comprehensive. It is presented in an accessible style for an international market. As in the web site the global applicability of the qualifications is emphasised. On-line career paths are outlined, showing how e learning can lead to higher-level qualifications. Information is supplied to potential providers of the courses showing the advantages of providing the supplier’s courses. For example, centres are told how they can “maximise profit potential”. All course material is provided to centres and training can be provided from beginner level to advanced. International testimonials are given in the literature. The examination material provided for Supplier B is shown.

Costs of Courses and Qualifications

Tuition centres recruit students and charge the local market rate for tuition. The UK supplier takes a small royalty per student. Each centre within a single country is charged the same royalty by supplier A; the charge varies from country to country and is made in sterling. Regional moderators collect and transfer the royalty to the UK supplier. In Zimbabwe the British Council is administering the fees for courses and exams. They collect fees in Zimbabwe dollars and transfer the royalty in sterling.

Supplier A perceives the main economic barrier in Zimbabwe to be the constant devaluation of the national currency. Difficulties with foreign exchange had been affecting enrolments and this is why the financial administration has been transferred to the British Council.

By contrast Supplier A encounters no problems in Sri Lanka connected with the economy. Although the Sri Lankan Rupee has been declining steadily for many years against international currencies, this makes it expensive for students to travel abroad. It is cheaper to remain in Sri Lanka and follow the courses and qualifications of a foreign supplier. Charges by centres in Sri Lanka are "probably among the lowest in the world, [the local tuition centre] relies largely on numbers ...though they do find us quite expensive"

GATS

This supplier was not aware of GATS until the time of the interview. They had a commercial interest and believed it will be helpful to them and have no negative implications. For example some countries are currently raising barriers to protect local qualifications. This means that the Supplier's qualifications are illegal in South Africa and they state they have "solved it" by having a dual certificate with a local university.

3.2 Supplier B

Short/History Background

Supplier B has a 150-year history of provision of secondary school level qualifications to foreign countries. It has been a major supplier of school-level qualifications to Zimbabwe. It does not supply school-level qualifications to Sri Lanka. This territory was supplied by Supplier C who have been supplying school-level examinations in Sri Lanka since the early 20th century. (See Supplier C report)

Types of Courses and Qualification

The school-level qualifications are offered at levels equivalent to the final 3 years of secondary education in the English system of education. Equivalent to the fifth year of secondary education are the General Certificate of Education 'Ordinary' levels (GCE-O) and the International General Certificate of Secondary Education (IGCSE); to the sixth year the Advanced Supplementary (AS) levels and to the seventh year the General Certificate of Education Advanced (A) levels and HIGCSE. (Higher International General Certificate of Secondary Education) There is a wide range of subjects within Languages (including many languages for first language or foreign language students). The examinations; including foreign languages are administered in the English language. As well as school level qualifications there is a range of 'Skills and Career awards' in Information Technology, business, management, project management, office administration, travel and tourism and thinking skills. These courses and qualifications are offered in English and in Spanish. Courses followed in Spanish medium are assessed in Spanish. Also offered are ICT starter awards for children aged 6-16.

Skills and Careers Awards are designed for people in work. These may be studied at a number of levels depending on the student's needs and abilities. Subject areas offered include: Information Technology—which is designed and examined for Supplier B by Supplier A; Business awards; Thinking Skills; Management Awards; Project Management; Office Administration; and Travel and Tourism.

The Supply of Courses and Qualifications

The web site makes freely available the syllabi and past examination papers for all subjects offered at O level, IGCSE, HIGCSE, and A level and AS level. The syllabi for these awards are available in full on the web site, but there does not appear to be an online learning element. The Skills and Careers award is a competence-assessed award with a modular format. Online discussion groups are available for many subjects, by password. Presumably most material is still supplied to schools in print format.

School examinations in Zimbabwe are being localised so this supplier is disengaging from the supply of qualifications in Zimbabwe. They have assisted the Zimbabwe School Examinations Council (Zimsec) in the transfer of examinations and systems. The process of transfer to Zimsec from Supplier B appears to have been marked by inconsistency on the part of the national authority. Some private schools continued to offer Supplier B's IGCSEs, AS and A levels. In other schools the transfer was made part way through the course of study. From June 1999 the national authority took on the management of the 'O' level, and from late 2002 the whole 'A' level process. It is apparent from the Zimbabwe press that this is a contested issue, with on the one hand, some hostility to the role of Supplier B because of its British provenance, but on the other concern about a lack of security in Zimsec and doubts from some about the international portability of the national exam, compared with that of Supplier B. Zimsec's own web site defends the quality of its exams and promises to end cheating, which is blamed on certain schools. There have been labour relations issues at Zimsec and a

shortage of markers for recent exams. Supplier B has now withdrawn from supply in Zimbabwe.

Demand for Courses and Qualifications

Although there is only a small demand for Skills Award qualifications in Zimbabwe, the fact that they are now being offered gives an indication of demand for different ways of studying and being examined for business, management and IT subjects. There has been an increase in demand in management awards in Zimbabwe. There is a dedicated web site and some courses are advertised as having computer-based assessment. (See Supplier A).

There has been no change in Zimbabwe entry numbers since Zimsec began to take over the exams in 1995. General qualifications have reached a plateau. The only subject showing an increase is *Management of Business* in the last 10 years. Demand is fairly steady. There is little change either in the level of qualifications or subjects taken.

The supplier was of the view that employers in Zimbabwe appreciated the supplier's reputation for 'integrity'. The supplier was of the view that parents liked their exams because of their international portability and the chances they gave to their children to study abroad. The supplier also felt that sixteen-year old students would perceive very little difference between the exams designed by the foreign and national supplier, especially in these transition years.

Marketing/ Promotion of Courses and Qualifications

The school level courses and qualifications are no longer marketed in Zimbabwe. In general however the course literature and web site emphasise the global acceptability of courses and international recognition of the qualifications. School level qualifications are promoted as both leading to further study and providing skills for employment. IGCSE qualifications, for example, "prepare students for further academic success...and equip them with skills for immediate employment". (Supplier B's Web site) The skills and careers awards are promoted as improving employment prospects. For example, these awards are advertised as being "internationally accepted...Increase employability... [and] A local context—a global approach—the awards are designed to exploit knowledge of local economies and business practice, and then place this knowledge in a global context resulting in a broader understanding of business issues around the world."(Supplier B's Brochure p4)

Cost of Courses and Qualifications

Exam entries are always paid in Sterling or US\$. People are not finding foreign exchange easy. Private schools are given time to find it. People are definitely scrimping and saving to find the money for Supplier B qualifications. There are difficulties with Foreign exchange. However Zimsec paid their bills for state schools exams in 2001. There was no problem there. The entry pattern has not changed due to the worsening economic situation or to foreign exchange difficulties. The economic situation is has declined in Zimbabwe, but little difference was noted to exam entries.

GATS

Although Supplier B was unaware of WTO and GATS, Supplier B is perhaps more aware than most of the complexities of the interface between local and foreign aspirations for qualification services. Supplier B has operated in the Southern Africa region (and indeed in most regions of the world) for many years, starting during the period of British colonisation. At a time when

foreign qualification suppliers are increasing their exports worldwide, most Southern African Countries are localising exams. 'They want to do their own thing'. Lesotho and Swaziland localised long ago. Botswana is in the process of localising a Botswanan GCSE based on the IGCSE. Namibia is localising on the IGCSE model and due to run local exams from 2006. Although Zambia localised many years ago, in 2001 Supplier B received 40-50 'A' level entries from about nine or ten Zambian State schools. The subjects are Maths, English, Geography and History. Lesotho and Swaziland exams are still accredited by Supplier B. They maintain the name of Supplier B in order to maintain international recognition. In Botswana and Namibia the exams are jointly accredited. Beyond 2006 Supplier B will provide quality assurance back up. In South Africa a number of students in private schools continue to register for Supplier B's exam, but they are developing their own system. From 2004-2005 the Ministry of Education will not allow foreign exams to be used at a level equivalent to or below the 'Matric'. A HIGCSE had been developed for South Africa. Although the standard of this exam is not as high as A or AS levels, it is higher than 'Matric' and qualifies South Africans for university entrance in South Africa. However the Ministry of Education does not want the HIGCSE because it is in direct competition with the South African 'Higher Matric'. Supplier B may continue to offer IGCSE and A and AS levels as long as they complement rather than directly compete with the local exams.

3.3 Supplier C

Short History/Background

Supplier C is the result of a merger between a vocational education awarding body (Supplier C: V) and a provider of A levels, O levels, and GCSE's (Supplier C: A). Supplier C has a complex history dating back to 1836. Supplier C: A has administered school level academic examinations since the early 20th century both in the UK and overseas. At the same time Supplier C: V evolved to develop an oversight of business vocational and technical qualifications and courses. In 1996 Supplier C: A combined with Supplier C: V to form the current body. Awarding bodies in health and in telecommunications have been acquired since and a further merger is planned with a major publishing house.

Types of Courses and Qualifications

Four types of qualifications are offered: academic; English language; mathematics, and vocational. The academic qualifications on offer consist of O Levels; GCSEs; IGCSEs; AS, and A Levels. The English qualifications are London Tests of English and London Tests of English for Children. The Mathematics qualification is a freestanding qualification available at three post school levels. The vocational qualifications are National and Higher National Diplomas (HND) and Vocational A Levels (formerly GNVQs). NVQs are also available for study and assessment in a work setting. The vocational qualifications are marketed separately in Sri Lanka under the title of the original vocational supplier (Supplier C: V) rather than under the organisation's umbrella title which is not well recognised. The historical University Examination Board has a long history of supplying examinations in Sri Lanka. During the British colonial period it was the main supplier of school-level examinations and then offered accreditation to local examinations that began to emerge. In the post-colonial period some private schools continued to enter their students for the examinations and qualifications of this supplier. A Sri Lankan HND exists, which is considered to be out of date by both this supplier and supplier F. Supplier C's HND qualification is recognised in Sri Lanka and it is valued there because it can enable progression to a UK University.

This supplier offers both courses of study and examinations. Academic qualifications are supplied to schools through the British Council in Sri Lanka.

The connections with UK or English authorities like the DfES and the QCA, respectively, are stressed in the literature. Although these UK government bodies have no remit over qualifications offered in other countries, the UK connection is important for this organisation's business. There is a need to explain the new AS/A2 exam scheme. Supplier C offers this new model because of the high regard of everything in the UK system. This is notwithstanding teething troubles that have been experienced with this system in the UK itself. Other organisations continue to offer A levels only.

The web site shows the syllabi, student information and sample exam papers for the academic subjects on offer. These are in English. Some subjects seem to be specifically aimed at Western students, for example, Government and Politics. But English Literature, for example, has a range of Literature for students to study. This reflects the content of the English National Curriculum. Vocational subjects can also be studied in Arabic and Chinese.

The supply of Courses and Qualifications

The literature invites centres to apply directly to Supplier C, but this is not the procedure in Sri Lanka; here academic qualifications are supplied to schools through the British Council. The vocational qualifications are promoted to employers through seminars for interested employers. Vocational qualifications and courses of study are provided through centres which may be employers or colleges. The web site describes a partnership arrangement for

vocational qualifications which pairs an experienced UK centre or college with an international vocational centre to maintain standards of achievement throughout the world.

Examinations based in part on course work, like GCSEs and AS levels can only be offered by specially approved centres, where the teachers have training and experience in moderating coursework. The number of schools allowed to do GCSE (with coursework components) is few, because of security issues. Because of security, Supplier C prefers to examine through written papers supervised by the British Council. The IGCSE is a qualification based on written examination after two years of study and meets this need where the GCSE, with its higher coursework component is not suitable.

Supplier C has a connection with [AACRAO \(the American Association of Collegiate Registrars and Admissions Officers\)](#). This organisation verifies credentials like the HND for admissions to US universities.

The administrative details of examination entries can be entered electronically; no teaching or assessment is available on line.

The Demand for Qualifications

Students

The trend has been away from Science subjects towards business studies, computing, economics and accounting. The liberal arts have never been strongly in demand.

Supplier C was of the opinion that young people in Sri Lanka are now more likely to follow their own inclinations in choice of A level, whereas before parents may have directed them towards science with a view to studying medicine.

Trends are less evident at the O level – because for most the A level is now the all-important exam that will determine life chances. The schools, rather than students make most of the decisions about subjects at O level. Trends at A level may also be a function of a shift in decision-making. Before ‘parent power’ was very strong. Now, students seem to have more say and are keen to go into business.

Employers

There is a strong link with the UK in Sri Lanka, therefore anything from the UK is perceived as good and desirable. Supplier C does not market its brands by making unfavourable comparisons with the local exam, but by emphasising the strengths of the their own brands. There is a possibility that local exams may contain errors or are perceived as less educational than Supplier C: A exams, which are perceived as having a higher degree of quality control.

Parents

There is strong aspiration to Supplier C’s academic exams across all social classes. The well-off classes always opt for them, but the poorer sections of society will sometimes make great sacrifices so their children can take them.

Marketing/Promotion of Courses and Qualifications

Courses are promoted through literature, a web site, the British Council and its Sri Lanka website and through fairs and visits to employers.

The supplier's literature, like the web site, uses the slogan "World Class Qualifications delivered locally...recognised globally". On the web site Supplier C's qualifications are described as "widely sought after and revered".

The vocational HND is promoted as having many progression routes. It is not the intention of Supplier C to drain a country of its students by encouraging them to continue their education overseas.

Costs of Courses and Qualifications

Payment for examinations is made to the British Council, rather than directly to Supplier C. This greatly increases the cost of the examinations, but there is a great social demand for this product, which people are prepared to save for in order to improve their children's chances.

GATS

This organisation was unaware of the discussions until this interview.

3.4 Supplier D

Short History/Background

Supplier D was founded in 1919, it received a Royal Charter in 1975 -“The Royal Charter recognises [Supplier D] as being among the top professional bodies in the UK, and allows us to qualify people as members. As a chartered body, we are responsible for observing UK government standards.”

Types of Qualifications

Qualifications are for finance professionals and management accountants. Qualifications are provided to students who have the equivalent of A levels or above and GCSE or O Level or equivalent including English and Maths. The Supplier’s brochure lists the international equivalent entry requirements for 15 countries. In order to study successfully for the qualification the candidate should be employed in a financial role.

Supplier D has offices in both Sri Lanka and Zimbabwe. Supplier D provides the same qualification around the world. The exams are all the same and they are all marked in the UK. The entry requirement is the UK equivalent. Students can start at Foundation level and do four levels or they can gain exemptions and start at a higher level. All seventeen papers from foundation level upwards are available in both Zimbabwe and Sri Lanka.

At least three years relevant practical accountancy work is required to qualify as an associate and this is logged in a career profile. This requirement is in addition to exam passes at foundation, intermediate and final levels. Practical experience must include basic experience, core experience and supplementary experience. The qualification is “principals based rather than systems based”; this is thought to give it transportability.

Supply of Qualifications

Supplier D does not provide courses. Thus, they do not own the delivery process, only the qualifications. Students attend local tutors to study for their exams. Supplier D study materials are also in competition with publishers of other study materials. Supplier D does no teaching, but provides accreditation for a minimum standard in colleges. Private sector providers deliver all courses locally and tuition is usually “pretty poor quality”. For example in Sri Lanka, there may be 200 students in a single class. This practice is not endorsed for quality assurance purposes, but it nonetheless goes on.

Supplier D is the examining body. All exams have an element of practical experience and competencies are assessed in the practical element. Competence can be gained in any company anywhere in the world. Competence is assessed by fellow members who act as volunteers in the interests of maintaining the standards of a Supplier D Qualification. Two assessors review each candidate. Supplier D would like to have this done by qualified, paid, professional assessors and this is now under discussion in the organisation.

The offices in each country are responsible for marketing. Everything else is administered from the UK, including payments, registration and exemptions.

The Demand for Qualifications

The majority of candidates start at foundation level in both countries. Entrance is from 18 years of age. The youngest candidate ever to obtain the full Supplier D qualification was a Sri Lankan. Candidates register straight from school in both countries. Few exemptions are issued. When they are these are usually in Sri Lanka, not Zimbabwe.

In Sri Lanka Supplier D has a very high status locally because it is international and that means it is transportable. Half of people who qualify with Supplier D will leave Sri Lanka. This is different to the home supplier of this type of qualification which doesn't have international recognition. Until recently there was little else in the way of business qualifications; now there are at least two.

In Zimbabwe, the Chartered Accountants of Zimbabwe qualification has always had regional reciprocity. So this has a higher profile than Supplier D's. There is another UK based supplier of accountancy qualifications which also has a higher profile and higher numbers of members. So in Zimbabwe, Supplier D is a third choice. Zimbabwe is not a key market for Supplier D.

Supplier D is not recognised in either country as an audit qualification, but is recognised as an accounting body.

There is a growing market for something that stops at foundation level. So a certificate and a diploma have been introduced that recognise work to a certain level without proceeding to the full Supplier D qualification. This is useful to people who want to understand more about accountancy for their jobs and need a certificate to demonstrate that they have undertaken some study. Supplier D is now a three-part qualification with certificated exit options at three levels. In Sri Lanka, most students still proceed to the full qualification. Malaysia is an example of a country where there is a strong demand for the lower level qualifications. This is partly from students who wish to gain some financial background without taking the full qualification, but also because of competition at all levels from other qualifications.

There must be support from employers for this qualification because Supplier D prefers its candidates to be employed in a relevant job. This is important because the skills needed for qualification must be supported within the context of employment. The qualification is integrated with practical work experience in an accounting environment and candidates must have direct experience of accountancy issues.

Marketing/Promotion of Qualifications

The key focus is on employers, who do the recruiting for Supplier D's qualifications. Supplier D promotes to major companies rather than to individual students. In Sri Lanka the qualification is promoted to parents, because parents are a key to the decision making process. The Supplier finds that qualifications are very much a family decision in Sri Lanka. All Marketing is managed by the offices in country. There is a web site which emphasises the global nature and portability of the qualification.

The literature of Supplier D discusses the impact of globalisation as follows:

Financial markets-even entire economies- are shaken by seemingly insignificant faraway events. New industries arise overnight. Fortunes are made and lost in hours, not years.

Welcome to the business world of the 21st century. A world where everything is connected and nothing is predictable. Where knowledge and imagination are more valuable than physical assets. Where there are no geographical boundaries.

A world of great uncertainty. And great opportunity.

There has never been a more exciting time to begin a business career. And there has never been a greater need for people with talent and vision. People able to grasp the opportunities offered by collapsing barriers to trade, to harness the technology that is revolutionising the way we buy, sell and communicate. (Brochure p3)

Cost of Qualifications

The typical cost of obtaining the full qualification is about £3000. The qualification in Sri Lanka is very "Colombo centric"; it is not in demand in rural areas and the cost is high. Those that are looking for a transportable qualification may consider that the cost is worthwhile. The Supplier acknowledged that access is limited by the price of the qualification.

Payments are made in Sterling to the UK except in Zimbabwe where Zimbabwe dollars are accepted. The same subscriptions are collected in every country. The rate charged does not vary with the local market, but is the same as is charged in the UK. Some consideration is currently being given to altering this fee structure and one of the considerations is whether to vary the rates according to what the market will stand in each country.

GATS

No awareness

3.5 Supplier E

Short History /Background

Supplier E was set up in 1881 to meet the specific needs for business education not being met in secondary schools and Universities at that time. Qualifications have been provided internationally since 1928. It now has 8000 centres providing training leading to its qualifications around the world. It describes itself as the “leading global provider” of business related qualifications.

Types of Courses and Qualifications

This supplier offers professional accountancy and business related qualifications at five post-school levels; vocational qualifications related to business are also offered. Examples of qualifications include International Call Handling, Accountancy, Advertising, Bookkeeping, Business economics, IT, languages, Marketing and Secretarial. Languages for Business qualifications are offered in English, Spanish, French and German. English language speaking and listening courses are offered in American and British versions.

The Supply of Courses and Qualifications

Supplier E provides qualifications backed up by study materials, support documents, recommended textbooks, “how to pass” guides and syllabi. The latter are available on line. Numbers of “guided study hours” are recommended to pass each exam. The courses leading to the exams are provided by examination centres in accordance with the number of guided study hours recommended by Supplier E to pass.

A commercial agent and co-ordinating authority is appointed in Zimbabwe. Administrative procedures, fees, paper distribution and transactions with schools and colleges are dealt with by the commercial agent and co-ordinating authority who are effectively a satellite doing business on Supplier E's behalf. The final contact is with the Africa marketing manager in the UK. About 30 schools and colleges are contacts in Zimbabwe.

The co-ordinating authority is retained by Supplier E to administer exams including delivering scripts, centre administration, security and fees. The commercial agent acts purely commercially to develop the market. There is no overlap between the two

This is a post school qualification and the minimum entry requirement for most of this supplier's qualifications is O level.

Supplier E prefers not to use the British Council in Zimbabwe, having examined the options.

Examination centres in Zimbabwe are mainly in Harare and some in Bulawayo and Mashingo. They are trying to extend this, but communications are difficult locally. At the time of interview Supplier E was not providing any courses or qualifications in Sri Lanka. However, this has since commenced through the offices of a franchisee based in Singapore.

Demand for Courses and Qualifications

Zimbabwe has been an important market for Supplier E for a long time. They have been active there for at least five years and the market has grown considerably. Product development is market driven. Human Resources (otherwise personnel management) is a new product, which will fit the Zimbabwe profile

However, the Zimbabwe market is now declining across the board. Any increases in candidates are merely accounted for by progression across levels, but the trend is decline. There were 15,000 entrants last year, representing a decline of 2000.

There is a traditional market loyal to a group of marketing qualifications. One third of entries are from marketing, advertising, PR, selling and sales etc. These subjects accounted for 5000 Zimbabwe candidates last year. After that the most popular subjects are Finance and Accountancy and General Business. Marketing has been the consistent leader over the last 10 years. A few candidates are taking English for Business and a few are taking secretarial qualifications, the supplier hopes this will be a growth area. There is very little call for IT subjects and this may reflect the local infrastructure.

The name of this supplier apparently gives quite a lot of weight to the perceived quality of exams on offer. According to the supplier it is seen as solid and internationally recognised. They believe themselves to be well regarded by students and parents, for whom the international recognition is important.

The Supplier E local agent is just starting to target employers and local professional bodies with a view to developing local professional demand for qualifications; for example, the Institute of Human Resource Managers of Zimbabwe who don't offer their own qualifications. Local people still value education and training and need to carry on, but there are no jobs for them when they have finished their qualifications.

The Supplier is active in 126 countries where there is a demand from students. The qualifications are based on English standards rather than being specially adapted for the international market and this is believed to lend the qualifications portability.

Competition for vocational qualifications in Zimbabwe is coming from other foreign suppliers, for example Supplier F. There is no competition from local suppliers.

As noted above, demand for business courses and qualifications appears to have increased in Sri Lanka to the extent that Supplier E's Singapore based franchisee is now providing the qualification there.

Marketing/Promotion of Courses and Qualifications

The qualifications are described on the web site as being "developed by industry experts who understand the needs of employers today". They are business related qualifications and this is emphasised. NVQs through this supplier are only available in the UK. This is distinct from Supplier F which has adapted the NVQ model for the international market. A brochure and the web site feature a personal address from The Chief Executive. He emphasises aspirations to extend online services, including testing and qualification delivery. This use of IT is important because it lets "people concentrate on bringing satisfaction to our... customers" The general brochure has many accounts and photographs of personal visits, both of Supplier E's UK based staff to tuition centres in different parts of the world and visits to the UK arranged for star students of Supplier E courses. In Zimbabwe radio is considered an effective marketing tool. There is a stress on improved employment prospects through these qualifications.

The recent marketing of Supplier E's courses in Sri Lanka emphasises the possibility of using the qualification to gain admission to many UK Universities, and as an exemption qualification for some professional bodies, including for example, Supplier D.

Cost of Qualifications

Exam fees go up with each series of exams according to what the market will stand. Inflation is over 100% in Zimbabwe. It is not possible to get money out. Supplier E charges fees in

Zimbabwe dollars and will continue to do so despite difficulties. Supplier E does not get any money out of Zimbabwe, but use it to pay local costs and salaries. Their aim is merely to maintain a presence in the market and invest in the future of what in the past has been a good market. The respondent observed that matters will get much worse in Zimbabwe, but equally there is a huge potential.

GATS

The respondent was not aware of the agreement, but made a connection between GATS and improving international recognition of the product at university level. Supplier E is keen on its qualifications being used to gain university entrance worldwide.

3.6 Supplier F

Short History /Background

Supplier F is an amalgamation of two main qualification suppliers, one specialising in vocational qualifications and the other in office and administration qualifications. The vocational supplier was founded in 1878 and merged with the supplier of administrative courses in 1990. A School examinations board was “established and administered” by the vocational qualification provider in 1953 and this was merged with two regional school examination awards to create a new body in 1997. The international operation was started in 1990 in response to increased demand. In some countries this supplier has assisted in setting up National examination systems and qualification structures.

Types of Courses and Qualification offered

Two different types of qualifications are offered. Qualification A is offered in single subjects in “bite-size chunks”; short courses focused on a single exam. The main categories of subject for Qualification A are vocational qualifications in IT, ESOL, office skills, administration, secretarial and business. Qualification A is very popular in Zimbabwe, but not in Sri Lanka. The papers are examined in the UK to ensure consistent standards.

Qualification B covers a range of technical and vocational qualifications, including for example Hairdressing, Beauty Therapy, Motor Vehicle Mechanics, Telecommunications, and Hotel and Catering courses. The qualification is especially designed for the international market and is based on the English NVQ. There are two routes to qualification. First a Craft Route which is for workers and second a Technician route which replaces HND. There are three levels at Craft route which equate to the first three levels of NVQ. There are three levels of technician route the second of which gains exemption from the first year of a university degree.

The assessment of both routes is structured in the same way. There is a competency statement, which is assessed by a “visiting verifier” usually in simulated work circumstances and a knowledge paper, which is a question paper. At Technician level, it is possible to take this paper separately from the competency assessment and this is often done by candidates to verify courses taken locally, at the same time as gaining a qualification which has international currency. This is important, especially in Zimbabwe as it allows mobility in seeking employment. In Sri Lanka, these qualifications are sometimes taken to enter further or higher education and people with the higher level qualifications can also opt to take further and higher education courses in the UK.

A management-training programme is featured on the web site. This programme is available in a limited number of countries mostly in the Gulf, and not in Sri Lanka or Zimbabwe.

Supply of Courses and Qualifications

In Zimbabwe Supplier F has a branch office covering Zimbabwe, Botswana, Malawi and Zambia. There are 300 centres offering qualification A and 80 offering qualification B. In Zimbabwe, students enrol with a privately owned college or centre providing the qualifications. The qualifications are not offered at government colleges which now only offer local (Zimsec) qualifications

By contrast, the market for qualification A is small in Sri Lanka. Demand in Sri Lanka for qualification A varies. (See section on demand below) Courses and qualifications in Sri Lanka used to be administered by the Ministry of Education, but this was then transferred to the British Council. The British Council is very good at administering exams, but does no proactive marketing and charge a 100% mark up, making the exams expensive for Sri Lankan students. Supplier F has plans to develop associations with individual providers of courses

and give exam centre numbers to individual course providers. The British Council would still need to be involved for local quality control and collection of fees. One advantage of the British Council is that it can collect fees in Rupees and remit them in Sterling. According to a web site press release Supplier F opened a branch office in Colombo in early 2003. Skills development funding from the Asian Development Bank and greater demand from the Sri Lankan Government for skills based vocational training has led Supplier F to work jointly with the Sri Lankan government to develop the skills base and vocational qualification infrastructure of the country. Supplier F's qualifications taken in Sri Lanka carry the imprimatur of both Supplier F and the government, giving them local and international currency.

The qualifications are designed to be generic for the international market. For example, qualifications dealing with food do not deal with specific types of food but with generic food groups and processing techniques. Questions on UK health and safety regulations are not asked; generic questions about health and safety are put in their place.

There are two main ways to obtain qualification B:

External candidates have attended a local course and want to obtain an international qualification. They go to the British council and enrol for the knowledge paper only. This is a common way to obtain the qualification in Sri Lanka and the papers are taken at Technician level. They will attempt the highest-level paper in the first instance. If they fail they take the next paper down or return the following year.

Internal candidates in Zimbabwe enrol at a college which is a Supplier F approved centre. They obtain the qualification through following the course. The qualifications in Zimbabwe are only offered at privately owned colleges, but not at government owned colleges.

On the supplier's web site, centres are referred to as customers and there is information on applying to become an approved centre and the quality assurance procedures applied. For customers which are already centres there is a "walled garden" site designed to take the "paper out of paperwork". This is only accessible to approved centres, but appears to be a site for dealing with the administration of courses and examinations on line.

The Demand for Courses and Qualifications

Demand for the qualifications offered by Supplier F waned in the 1970's once newly independent nations had their own qualifications in place. It started to increase again in the 1980's. The international business came back without trying in the mid 80's. Supplier F set up its international arm in 1990 to cope with this increased demand. At the time of interview (July 2000) demand in Zimbabwe was increasing by about 10-15% per annum, despite economic difficulties for candidates. Demand in Sri Lanka was flat at the time of interview because of the effect of the high mark up charged by the British Council. Greater marketing was planned and as mentioned above there a link has since been made with the Sri Lankan Government.

In Zimbabwe, secretarial qualifications are extremely popular. IT is also popular; there is no demand for ESOL in Zimbabwe. In Sri Lanka, the demand for courses leading to Qualification B is mainly for telecoms, electrical and electronic engineering at technician level. Motor vehicle Mechanics, Mechanical Engineering and Construction Engineering are subjects which are taking off in Sri Lanka. There is an IT qualification at level 4, but Supplier F emphasised that it cannot compete with the qualifications provided by supplier A. In Zimbabwe, there is a strong demand for telecoms. Electrical and Electronic Engineering and Motor Vehicle Maintenance, and Quality Assurance qualifications are popular in Zimbabwe. Hotel and catering and International Tourism were selling well at the time of the interview. Also popular in Zimbabwe are market research, teacher training, retail and assessor awards.

In Zimbabwe, students are keen to obtain a qualification that will get them a job. In Sri Lanka the qualification has not been particularly well known. There, it is used for progression to university; the demand is for the highest possible qualification.

In Zimbabwe parents scrimp and save to put their children through these qualifications. They are highly rated by parents, and students value them for onward study and employment.

Marketing and Promotion of Courses and Qualifications

Supplier F qualifications are promoted as added value to home qualifications, not as an alternative.

In Zimbabwe, these qualifications are said to be well known by employers. They are advertised on TV and radio and in the papers and according to Supplier F employers are happy to recommend them to their workers. Employer seminars are held to promote the qualifications and some centres are employer's own training departments.

In Sri Lanka the operation has been in the hands of the British Council and no pro-active marketing has been carried out. The Supplier has plans to address this issue and has recently (early 2003) "signed a co-operation agreement with the Sri Lankan Ministry of Tertiary Education and Training to assist with strengthening Sri Lanka's vocational and technical framework" (source: web site press release). The same press release observes that Supplier F's vocational qualifications (Qualification B) "are widely accepted worldwide including the Gulf States for employment and educational advancement" and that with these qualifications "the employability of Sri Lankans will make them an attractive proposition for local and international industry".

There is an international web site for both sets of qualification and this provides a wealth of information for students, centres and employers on qualifications and how to obtain or provide them. The qualifications are promoted on the web site as "globally recognised".

Cost of Course and Qualifications

The cost in Sri Lanka is relatively high because of the mark-up costs of the British Council. In Zimbabwe it can be very difficult for candidates to afford the qualifications, but demand continues to rise because of the improved chances of gaining employment and international mobility for jobs and university education especially from the Technician qualification.

There are difficulties in Zimbabwe because the candidates for Qualification B are debtors to the Supplier F directly and have to remit their fees in sterling, which is not available. Qualification A fees are remitted to the office in Zimbabwe dollars, but as these cannot be transferred out of the country, local currency accounts are building up and losing value simultaneously because of the very high rate of inflation.

The respondent considered the Supplier's financial situation in Zimbabwe very problematic. There is some concern over the future of the Zimbabwe operation and how long the debts can be sustained within the company as a whole. But Supplier F is a registered charity with a mission to provide educational services and would consider very carefully before pulling out on financial grounds.

GATS

(Topic not raised in this early interview.)

3.7 Supplier G

Short History/Background

Supplier G is part of a prestigious, federal University that has had degree-awarding powers since the mid nineteenth century and has run a distance-learning programme for students studying nationally and internationally since 1858. The organisation is a federation of separately incorporated and self-governing academic institutions. The institutions that constitute the federation attract large numbers of UK and foreign students for face-to-face courses, and some offer degree-level courses through distance and blended modes directly. Our case study however focuses on the centrally coordinated federal programme of distance courses on which, currently, some 30,000 students from 190 countries (including the UK) are registered annually for courses of study. These 30,000 complement the more than 100,000 students following courses through the face-to-face mode annually.

Types of Courses and Qualifications

Supplier G provides academic (and professional) qualifications mainly at Level 3 (i.e. bachelors degree, postgraduate diploma, Master's and doctoral. The pre-degree diploma may be regarded as a Level 2 qualification. An access course is provided for those who do not have A Levels. Bachelors degrees (BA, BSc, BD and LLB) are available in a wide range of subjects with each being provided through a "lead college" of the federal university Short modular courses are available at Master's level for those seeking individual or professional development. These are available in a range of professional areas these include Law, Human resource management, management, environmental studies, Veterinary studies, accountancy and agriculture. Post Graduate diplomas are available in the same areas as master's degrees. These include, Business, Health, and Agricultural studies, Finance, Orthodontics, Distance Education and United States Studies. Because of the size and nature of the University the potential study areas are wide and varied.

The Supply of Courses and Qualifications

Academic staff in the institutions that make up the federation provide the academic development, direction, and assessment of the courses through a network of lead institutions. For some degrees there is a single 'lead' college; for others there is a consortium. Course materials are despatched by the central co-ordinating body to students. Although many of the

courses can be followed entirely at a distance (through a blend of print and online materials), the pre-degree diploma and other selected courses can only be followed through attendance at an approved teaching centre located in the student's country of study. Where the course relies on online pedagogy the website and email facility provide the learning and teaching platform. Face to face teaching is provided in 110 approved teaching centres worldwide. Examination centres are also identified in each of the countries of study for all courses of study. In foreign countries, these centres are often provided at the local British Council office or the respective Ministry of Education. Examination scripts are marked by staff of the respective lead college, working to an examination board chaired by a senior member of academic staff. The standard of the assessment and the qualification of the 'external' courses and 'internal' courses is identical. Every year a major graduation ceremony is organised for several thousand students, many of whom will be travelling to the UK for the first time and for the purpose of collecting their degree face to face.

The Demand for Courses and Qualifications

The market for Supplier G qualifications in Zimbabwe and Sri Lanka should be seen in their respective regional contexts. In the Africa region total registrations have increased from 839 in 94/5 to 1370 in 00/01. This is modest, in view of the total registrations of 30,000. Countries

demonstrating growth (but from very differing starting points) include Botswana, Ethiopia, Gambia, Ghana, Mauritius, Rwanda, South Africa, and Tanzania. The market in Zimbabwe grew from 80 in 94/5 to 132 in 97/8, followed by a decline to 69 in 00/01. The majority of registrations from Zimbabwe are at the post-graduate level. For example in 00/01 51 students registered at the post-graduate level compared with 18 at undergraduate level. The 51 registrations are spread widely across 21 courses. While some courses attract only a single student, others attract groups of students. In 00/01 12 students registered on the 'environment' courses, 15 on various Agriculture and Rural Change courses, and 6 on economics and finance courses. At the undergraduate level where 18 students were registered, the Bachelor in Law (LLB) attracts the largest single group of students.

In the South Asia region registrations have grown more rapidly though remain small in the global context. Over the period 94/5-00/01 registrations in South Asia increased almost six-fold, from 234 to 1311. Sri Lanka shows consistent growth from 116 in 94/5 to 386 by 00/01, a number only slightly smaller than Pakistan (398) but larger than India (201) and Bangladesh (256). And in contrast with Zimbabwe, the majority of registrations in Sri Lanka are at the undergraduate level. Of the 386 registrations in 00/01 only 10 were at postgraduate level. In 00/01 the largest undergraduate registrations are found in the subject areas of economics and management (74 on the diploma in economics, 39 in economics and management, 35 in management and 15 in management with law), the LLB (69) and computing (73 on diploma and degree).

Although the registrations in Sri Lanka and the South Asia region in general are increasing, the numbers of students remain small when compared with those in East and South East Asia. In 1997 for example, student registrations in Singapore, Hong Kong and Malaysia were 6892, 4808 and 4680 respectively.

Marketing/Promotion of Courses and Qualifications

Like each of our case study qualification suppliers, Supplier G has an extensive website. In the case of Supplier G this provides information on a range of matters. For example study weekends in lead colleges, education exhibitions worldwide, how applications can be made and full details about study. In addition the programme relies on a range of print materials to market its courses (e.g. flyers, education guides, newspapers, and magazines), education exhibitions and visits, referrals by other agencies and word of mouth.

Staff in the central office monitor information from those who enquire about courses about how they came to learn about the course. Between 1999 and 2001 the largest numbers of enquiries from Zimbabwe in the same period came through the local Rapid Results College, the world wide web, the British Council, friends and family referrals, and schools and colleges.

In the same period the largest number of enquiries from Sri Lanka arose through the World Wide Web, advertisements in the Sri Lankan Sunday English press, educational exhibitions, newspaper adverts associated with the exhibitions and referrals from friends and family.

The marketing brochures set out the benefits of studying for a Supplier G qualification and the benefits of studying as an external student. The brochure contains extracts of statements by successful students, and importantly, on the equivalence of standards with the face-to-face degrees etc.

Costs of Courses and Qualifications

The costs of courses are the same worldwide. However non-EU students are charged slightly more than EU students. The costs are broken down into: Application fees; exemption fees;

initial registration fees; continuing registration fees, and examinations fees. An undergraduate degree costs between £1500-£2500 to complete and a postgraduate degree between £7000 and £10,000 depending on the amount of support required. Additionally, local centres charge a tuition fee and examination fee. Study materials are provided, but textbooks are extra. Fees are charged in GBP.

GATS

This was not covered in this interview.

4.0 Conclusion

4.1 Modes of supply

It was interesting to note that a variety of methods was employed by different suppliers when it came to the delivery of courses and qualifications. These were often geared at facilitating candidates gaining a UK qualification, for example by minimising the amount of time (if any) necessary to study in the UK—which is very expensive.

The following methods were used:

1. *Face-to Face.* Supplier A, Supplier C and Supplier F delivered courses leading to their qualifications face-to-face, usually through an accredited agent, who provided tuition using the suppliers' course materials and assessment methods.
2. *Distance.* Supplier A provided some of its courses at a distance and Supplier G provided all its courses by distance learning. Written examinations were usually marked and moderated in the UK, although Supplier A was moving some of these activities to regional activities.
3. *Study at home and in the UK.* Supplier A provided courses leading to their qualifications which could be studied partly at home and partly (usually the higher level of a course) in the UK. This was achieved through partnership with UK universities. Supplier E and Supplier F provided information to their candidates on further courses in the UK, from which their qualifications earned exemptions. This sort of exemption allowed students to gain a UK degree but reduce the cost of studying in the UK
4. *Distance and face-to face blended.* Most of the suppliers blended their course and qualification delivery between distance learning and face-to-face- tuition to a degree. Many now use the Internet to facilitate learning at a distance.
5. *Qualification only.* Supplier D only provided assessment leading to its qualification. Tuition was arranged by the candidates independently, and it was acknowledged could be of variable quality.
6. *Quality assurance and development.* Supplier F was very involved in quality assurance and national systems development. For example they work in partnership with the Sri Lankan government to develop a vocational qualifications framework.

4.2 The hypotheses

Although this is a limited sample of UK qualification suppliers, these seven case studies confirm in part the proposals contained in the four hypotheses listed on page 4 of this report.

In respect of vocational qualifications the accounts of several of our respondents indicate that the increase in the volume of supply of qualifications, (especially for example, the vocational qualifications provided by Supplier F), has been demand led. The increase in demand starts with employers seeking a better-qualified workforce. For example in Sri Lanka employers are seeking computer literate recruits with a command of English. They increasingly see the importance of career based, professional and vocational qualifications instead of the highest-level academic qualifications traditionally most prized in the area. In Zimbabwe young people themselves are behind the growth in demand for vocational qualifications—either to improve their employment prospects in an increasingly competitive labour market, or to improve their chances of leaving the country. Supplier A indicated that the increase in demand for their qualifications was linked with increasing levels of technological infrastructure.

The hypothesis related to increased distance qualifications at higher education level is met by the research carried out with Supplier G. From this we see that in the African region in general there has been modest increase of demand only and Zimbabwe in particular there has been a decline in demand. It may be that students from the Southern African region are

able to access Higher Education provision from South Africa and prefer to do this. However in Sri Lanka demand for Supplier G's distance degrees has increased consistently, although

in comparison with the demand from East and South East Asia the absolute numbers are small. Supplier A had links with UK universities to provide degree and postgraduate qualifications in computing, and at the time of interview was planning to offer post graduate courses in Sri Lanka to meet increased demand from students for the higher level courses and qualifications.

Overall all these suppliers spoke of increased demand in international markets. In Sri Lanka an increase was noted by all respondents. In Zimbabwe the situation has been complicated by external factors and increased demand is less clearly defined.

Annex 1

Sample interview questions

How are Supplier B examinations administered in Zimbabwe?

How has the demand in general for Supplier B qualifications changed over the last 20 years?

Has there been an increase or decrease in demand for Supplier B qualifications in Zimbabwe?

Has there been a change in the subjects taken? Which subjects have declined and which increased in popularity?

Have there been changes in demand for different levels of qualifications?

How are Supplier B Examinations perceived compared with similar (foreign or national) qualifications available locally? By students? By parents? By employers? By the state?

What is the age group taking Supplier B qualifications? Has this changed recent years?

Does the economic situation in Zimbabwe affect the demand for qualifications? If so, how?

Are foreign exchange regulations important for your operation?

Are you aware of the implications of GATS for the work of your organisation?

Annex

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1. Special issue of the *Journal of Assessment in Education: Principles, Policy and Practice*, Carfax publishers, Volume 7, No 3, 2000 on the theme 'Globalisation, Qualifications and Livelihoods'

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