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Panel on Education

Meeting on 7 February 2013

**Background brief on
Issues related to the development of e-learning and e-textbooks**

Purpose

This paper summarizes the concerns of the Panel on Education ("the Panel") on the development of e-learning and e-textbooks.

Background

Information Technology in Education Strategies

2. Since 1998, the Administration had launched three Information Technology ("IT") in Education Strategies and had invested about \$8 billion with the aim of shifting the paradigm in school education from a textbook-based and teacher-centred mode to a more interactive learner-centred mode. The objective of promoting IT in education is to improve the effectiveness of learning through electronic technology.

3. In 1998, the Administration launched the first IT in Education Strategy which focused on equipping schools with necessary IT facilities and Internet connection. The second IT in Education Strategy launched in 2004 aimed to enhance students' information literacy, build up the capacity of teachers, disseminate best practices in using IT in the learning and teaching process. The third IT in Education Strategy was launched in 2008 with the objectives to provide a depository of curriculum-based teaching modules with appropriate digital resources, sharpen teachers' IT pedagogical skills, assist schools to draw up and implement school-based IT in education development plans, strengthen technical support to schools and teachers, as well as raise parents' information literacy.

E-learning resources and textbooks

4. Following the implementation of the three IT in Education Strategies and in response to public concern about rising textbook prices, the Administration set up in October 2008 the Working Group on Textbooks and e-learning Resources Development ("the Working Group") to study the use and development of textbooks and e-learning resources. The Working Group submitted its report to the Secretary for Education ("SED") in October 2009. Its major recommendations included-

Development of e-learning

- (a) launching a three-year pilot scheme on "Promoting e-Learning" in 20 to 30 local schools in the 2010-2011 school year;
- (b) provision of additional resources to strengthen and expedite the development of the "Depository of Curriculum-based Learning and Teaching Resources" ("the Depository") from the 2009-2010 school year onwards;
- (c) provision of a one-off grant in the 2010-2011 school year to all local schools for purchasing e-learning resources;
- (d) setting up an e-commerce platform for e-learning resources and an online community for teachers at the Hong Kong Education City ("HKEdCity") website which is operated by the HKEdCity Limited¹;

Textbooks

- (e) implementation of the "five-year no revision rule" for textbooks; and
- (f) implementation of the policy of debundling textbooks and teaching/learning materials for pricing starting from the 2010-2011 school year.

¹ The HKEdCity Limited is a wholly owned company of the Government and operates under the Education Bureau. It provides a one-stop education portal (i.e. the HKEdCity website) which serves as a collaborating platform for schools, institutions and education practitioners to exchange information on education resources, softwares and services. Since 2004, the HKEdCity Limited has been entrusted the work of searching and promoting digital learning resources and to play the role of a market facilitator.

5. In June 2011, the Task Force to Review Learning and Teaching Materials ("the Task Force") was set up to review and examine issues arising from the policy of debundling textbooks and learning/teaching materials for pricing. In its report published in December 2011, the Task Force opined that the Government should play a more proactive role in promoting the use of e-textbooks to provide interactive and diversified learning as well as to address the current market distortion problem of printed textbooks. SED accepted the report and the recommendations of the Task Force.

Deliberations of the Panel

Issues related to e-learning

6. The Panel had reviewed a number of initiatives to develop e-learning. Members' views and concerns are highlighted in the ensuing paragraphs.

Pilot Scheme on e-Learning

7. At the Panel meeting on 8 February 2010, members considered the Administration's proposal to launch the three-year Pilot Scheme on e-Learning ("the Pilot Scheme") starting from the 2010-2011 school year. Regarding the criteria for selecting the schools to participate in the Pilot Scheme, the Administration advised that the selection was based on the merit of the proposals submitted by schools and their commitment to develop and promote e-learning. Furthermore, given that the participating schools would be the research and development centres and change agents to facilitate future wider adoption and adaptation of e-learning, the Administration also considered it important to maximize variations amongst the pilot schools in terms of school and curriculum contexts as well as partnership arrangements.

8. According to the Administration's response to Hon Andrew LEUNG's question on e-learning resources at the Council meeting of 16 February 2011, a total of 21 pilot projects had been selected and the Pilot Scheme would be completed in 2014. The Education Bureau ("EDB") would review the Pilot Scheme regularly and publish the relevant findings.

Financial assistance to schools for purchasing e-learning and teaching resources

9. Members noted that the Administration had set aside \$50 million for providing a one-off grant to all subsidized schools in the 2010-2011 school year (in the amount of about \$30,000 to \$70,000 per school) for purchasing e-learning and teaching resources and the grant could be spent over three

years. As advised by the Administration, should schools have financial difficulties in purchasing the necessary teaching materials, the Administration would consider allocating additional resources to them through the existing funding mechanism.

Availability of e-learning resources

10. Considering that teachers could not afford the time to produce e-learning resources, members called on the Administration to collaborate with the HKEdCity to provide resources to enable schools to develop school-based e-resources. Many deputations urged the Administration to provide assistance to teachers to develop electronic learning materials and to address related issues such as revision of software, increased teacher workload and the changed mode of teaching.

11. It was noted that EDB set up the "EDB One-stop Portal for Learning and Teaching Resources" at the HKEdCity on 2 May 2012 to provide teachers with learning resources so as to facilitate their teaching. The "Web-based Resource Platform for Liberal Studies" and the "Resources Depository" of the HKEdCity also provide plenty of free teaching materials to support the teaching of various subjects at different key stages.

Copyright of e-learning resources

12. Members noted that as the source of a large amount of online learning resources was unknown, some teachers were unable to obtain permission from copyright owners to use the materials. Publishers however were concerned about the illegal use of e-resources as these resources could be disseminated more readily than printed materials. It was further noted that the Working Group had suggested that studies on the copyright issue should be carried out in order to formulate relevant strategies and support measures.

13. According to textbook publishers, copyright owners demanded high copyright fees posing a financial burden on them. Textbook publishers pointed out that while the copyright fees for printed textbooks could be set in accordance with the number of copies sold, there was no established mechanism for determining the copyright fees for online resources and their patronage was also difficult to ascertain. Members sought information from the Administration on the guidelines, if any, for setting the relevant fees, and considered that the issue of copyright of online resources warranted in-depth study.

14. The Administration explained that there were different modes for charging copyright fees for using online resources, such as by monthly or

lump sum payments. There was no copyright fee for the use of certain resources, such as the "Creative Commons Hong Kong", for the benefit of the education sector. The Administration was aware of the importance of respecting the right of copyright owners, and had been educating teachers and students on legal use of copyright materials.

15. Regarding the funding needed for conducting studies on the subject as suggested by the Working Group, the Administration advised that it could absorb within its existing resources the cost for carrying out the studies relating to copyright of online resources.

E-learning opportunities for needy students

16. Members were concerned that the extensive use of e-learning materials would create a digital divide and marginalize students lacking financial means. To ensure that these students would not be disadvantaged, members considered it important to provide subsidies to enable needy students to have access to the Internet. At its meeting on 12 April 2010, the Panel deliberated on the \$500 million start-up capital proposed by the Financial Secretary in the 2010-2011 Budget. The initiatives to be funded included the introduction of a household-based cash subsidy scheme for Internet access charges and the Internet Learning Support Programme ("ILSP") to help eligible families acquire affordable Internet services and computer equipments and to provide them with necessary user and social support. Members expressed support in general for the Administration's proposal. The Internet access subsidy has been disbursed to eligible families since the 2010-2011 school year, and the five-year ILSP was put in place in July 2011.

Issues related to e-textbooks

17. The prices of school textbooks had all along been of major concern to the Panel. Members noted that the high textbook prices was often attributable to the excessive bundling of textbooks with teaching and learning materials, as well as the luxurious gifts and donations provided by publishers to schools in promoting textbooks. In this regard, the Panel had deliberated on the debundling policy as recommended by the Working Group, as well as the development of the e-textbook market.

Efficacy of the debundling policy

18. While welcoming generally the implementation of the policy to debundle textbooks and teaching/learning materials for pricing, members considered that this was only a short-term measure which could at best help

stabilize, but not lower substantially, textbook prices. The long-term solution lay in introducing fundamental changes to the textbook market. Members had put forward various suggestions to address the problem of high textbook prices, which included simplifying the vetting and approval procedure for inclusion of textbooks in the Recommended Textbook List ("RTL")² with a view to introducing more competition, including textbook price as one of the criteria in the vetting and approval of textbooks, and specifying a cap on textbook prices.

19. Whilst noting members' views, the Administration considered that in the spirit of free-market economy, it should not intervene in the setting of textbook prices which was primarily a commercial decision of publishers. Instead, the Administration would seek to implement new measures and develop the e-textbook market.

Implementation of the debundling policy

20. The debundling policy was originally scheduled for implementation in the 2010-2011 school year, but was deferred to the 2011-2012 school year at the request of textbook publishers on the ground that more time was needed to resolve the copyright issues. Despite repeated discussions between EDB and the publishers, the publishers failed to implement the policy of fully debundling textbooks and teaching/learning materials for pricing in the 2011-2012 school year, but proposed to complete the debundling process in three years' time (i.e. by 2014). The Administration considered the publishers' delaying tactics not acceptable, and at one stage, forewarned that if the publishers would not debundle their textbooks for pricing after the 2011-2012 school year, EDB would tender out the development of textbooks and teaching materials so as develop a competitive textbook market³.

² Currently, RTL is applicable to printed textbooks. The textbooks used in Hong Kong are mainly compiled according to the relevant curriculum guides developed by the Curriculum Development Council. In order to ensure the availability of quality textbooks to schools, EDB has devised a stringent textbook review mechanism. Textbooks will be included in RTL only if they have met requirements in specified areas including relevance to the curriculum guides, accuracy of content, and meeting of learning targets.

³ See the Administration's paper CB(2)2083/10-11(01).

21. Some members expressed reservation on the Administration's proposal of tendering out the development of textbooks and teaching materials. They were concerned that the usual practice of awarding the tender to the bidder quoting the lowest price might end up compromising the quality of textbooks. There was concern about the lack of diversity in the textbook market if the contract was awarded to a single or a small number of bidders. Some members also expressed concern about any possible control or censorship of the contents of textbooks by the Administration.

Textbook recycling

22. Textbook recycling was one of the recommendations of the report of the Working Group released in October 2009. Members expressed strong support for promoting initiatives on textbook recycling such as provision of textbooks by schools for loan to students and the sale of second-hand textbooks in schools. They called on the Administration to collaborate with parent-teacher associations to promote the benefits of textbook recycling. At its meeting held on 14 May 2012, the Panel passed a motion requesting EDB to promote the implementation of textbook recycling programmes in schools and encourage teachers and students to use second-hand textbooks so as to alleviate parents' burden and promote environmental protection.

23. In its written response to the motion, the Administration outlined a series of initiatives to promote textbook recycling, and undertook to continue working with the Consumer Council and environmental protection agencies to encourage different types of textbook recycling measures. According to the Administration, the existing textbook vetting criteria had been optimized to facilitate the reuse of textbooks among students and encourage them to use other means to finish assignments and assessment tasks. It also referred to the launch of the "EDB One-stop Portal for Learning and Teaching Resources" at the HKEdCity website which provided teachers with diversified learning/teaching activities and assessment tasks for selecting and developing learning, teaching and assessment resources. The Administration envisaged that the above measures were instrumental in minimizing schools' reliance on printed textbooks.

24. Hon Mrs Regina IP raised a written question at the Council meeting on 7 November 2012 on the existing textbook vetting criteria to facilitate the reuse of textbooks. According to the reply of SED, an additional

requirement that the textbook design should facilitate the reuse of textbooks had been adopted in the Guiding Principles for Quality Printed Textbooks revised in 2012. EDB had also revised the textbook review criteria by adding new items which aimed to encourage the recycling of textbooks, reduce unnecessary wastage and alleviate the financial burden on parents.

E-Textbook Market Development Scheme

25. To take forward the relevant recommendation in the Report of the Task Force to promote the development of e-textbooks, the Administration launched the E-Textbook Market Development Scheme ("EMADS") after obtaining approval of the Finance Committee ("FC") on 1 June 2012 to create a new commitment of \$50 million for providing seeding grants on a 50:50 matching basis to successful non-profit making applicants. The EMADS aims to encourage potential and aspiring e-textbook developers to develop e-textbooks in line with the local curricula and to try out a quality vetting and assurance mechanism with a view to drawing up a RTL for e-textbooks similar to that for printed textbooks. A Steering Committee on the Selection, Quality Assurance and Review of EMADS ("the Steering Committee") has also been set up to oversee the implementation of EMADS and to approve applications⁴.

26. The Panel was consulted on the financial proposal on 14 May 2012 before it was submitted to FC. In the course of deliberation, members raised a number of concerns and considered that the Administration should -

- (a) help schools upgrade their IT infrastructure to facilitate the use of e-textbooks;
- (b) ensure that e-textbooks and relevant equipment would only include the necessary material or features so as to keep their prices at a reasonable level; and
- (c) continue to introduce measures to lower the prices of textbooks, as the e-textbook market might take years to fully develop.

27. When considering the proposed funding under EMADS, some members of FC sought explanation on how the promotion of e-textbooks could help lower textbook prices. According to the Administration, e-textbooks incurred lower production costs when compared to printed textbooks as printing, storage, transportation etc. would not be required.

⁴ Please see FCR(2012-13)35 for details of the financial proposal on EMADS.

The development of e-textbooks would also introduce greater competition into the textbook market.

28. Concern was also raised about the membership and role of the Steering Committee. The Administration advised that the Steering Committee would comprise experienced school principals and teachers, representatives from the business and IT sectors, the Consumer Council, parents and the HKEdCity Limited. The Steering Committee would also be responsible for setting the criteria for assessing and approving applications. In this regard, the Administration has been specifically requested to report to the Panel the criteria for approving funding under EMADS and the organizations/persons whose applications to develop e-textbooks were approved.

Latest developments

29. According to the press release issued by EDB on 29 November 2012⁵, the Steering Committee has approved a total of 30 applications for the development of e-textbooks. It is reported that when compared with the prices of their printed counterparts on the same academic subject, the e-textbooks developed under EMADS are generally of a lower price. As stated in the press release, EDB will conduct an interim review of EMADS. Based on the outcome of the review, the Steering Committee will determine whether a second phase for EMADS is desirable and if so, when to implement it.

30. In December 2012, EDB released the Report on the Review Surveys of the Third Strategy on Information Technology in Education⁶. The study covered a total of seven Review Areas, including IT deployment in schools, IT deployment for learning and teaching and students' awareness/competency in the use of IT. In terms of the progress made in these seven areas, the study concludes, amongst others, that schools are ready for a paradigm shift towards the mode of student-centred e-learning.

31. The Administration will report the progress of implementing EMADS to the Panel at the meeting on 7 February 2013. The Administration has also been asked to brief members on the use of e-platforms to facilitate teaching and learning.

⁵ Please see <http://www.info.gov.hk/gia/general/201211/29/P201211290357.htm>

⁶ The report is available on the website of EDB at <http://www.edb.gov.hk/>.

Relevant papers

32. A list of the relevant papers on the Legislative Council website is in the **Appendix**.

Council Business Division 4
Legislative Council Secretariat
1 February 2013

List of relevant papers

Meeting	Date of meeting	Paper
Legislative Council	17.12.2008	[Question 8] Access to computers and internet by students from recipient families under CSSA Scheme (Hansard English – pages 69-71)
Panel on Education	11.5.2009 (Item V)	Agenda Minutes
Legislative Council	13.5.2009	[Question 11] High prices of school textbooks (Hansard English – pages 77-80)
Legislative Council	3.6.2009	[Question 18] Prices of school textbooks (Hansard English – pages 101-105)
Panel on Education	14.12.2009 (Item VI)	Agenda Minutes
Executive Summary of Main Report of the Working Group on Textbook and e-Learning Resources Development		CB(2)518/09-10(01)
Panel on Education	8.2.2010 (Item V)	Agenda Minutes CB(2)2078/09-10(01)
Panel on Education	12.4.2010	Agenda Minutes
Legislative Council	16.2.2011	[Question 9] Electronic Teaching and Learning Materials (Hansard English – pages 84-86)

Meeting	Date of meeting	Paper
Panel on Education	10.3.2011	CB(2)1249/10-11(01)
Panel on Education	11.4.2011 (Item VI)	Agenda Minutes
Panel on Education	21.6.2011 (Item I)	Agenda Minutes
Panel on Education	14.5.2012 (Item IV)	CB(2)1916/11-12(01) Agenda Minutes
Finance Committee	1.6.2012 (Item No.4)	FCR(2012-13)35 Minutes
Panel on Education	5.6.2012	CB(2)2296/11-12(01)
Legislative Council	7.11.2012	[Question 9] Textbook Vetting Criteria (Hansard English – pages 78-80)

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