중남미
이러닝시장
진출 설명회
중남미 이러닝시장 진출 설명회

- 개최일시 및 내용
  - 개최일시: 2010.9.15(수) 10:00~11:40
  - 장소: COEX 컨퍼런스룸 남 403호
  - 참가비: 무료

- 설명회 프로그램

<table>
<thead>
<tr>
<th>시간</th>
<th>내용</th>
<th>연사</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:30~10:00</td>
<td>등록</td>
<td></td>
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<tr>
<td>10:00~10:03</td>
<td>개회사 및 환영사</td>
<td>KOTRA 정보컨설팅본부</td>
</tr>
<tr>
<td>10:03~10:55</td>
<td>브라질 이러닝 시장동향 및 진출방안</td>
<td>UCB Virtual 교수 Dr. Francisco Botelho</td>
</tr>
<tr>
<td>10:55~11:25</td>
<td>칠레 이러닝 시장동향 및 진출방안</td>
<td>칠레 이러닝대학 연합 Michele Bass-부장</td>
</tr>
<tr>
<td>11:25~11:40</td>
<td>Q&amp;A</td>
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</tbody>
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브라질 이러닝 시장특성 및 전망

UCB Virtual 교수
Dr. Francisco Botelho
Distance Learning in Brazil: Prospects and Challenges

Dr. Francisco Villa Ulhôa Botelho

Topics

1. Brazil / macro indicators
2. Results of Censoead.br
3. Prospects and Challenges
### 1. Brazil / Macro Indicators

#### Brazil: Macroeconomic Indicators

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP growth (%)</th>
<th>Population (mil habitantes)</th>
<th>Average exchange rate (US$)</th>
<th>World GDP growth (%)</th>
<th>Latin-American GDP growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>4.3</td>
<td>171,280</td>
<td>1.830</td>
<td>644,452</td>
<td>4.8</td>
</tr>
<tr>
<td>2001</td>
<td>1.3</td>
<td>173,808</td>
<td>2.350</td>
<td>553,098</td>
<td>2.3</td>
</tr>
<tr>
<td>2002</td>
<td>2.7</td>
<td>176,304</td>
<td>2.921</td>
<td>505,904</td>
<td>2.9</td>
</tr>
<tr>
<td>2003</td>
<td>1.1</td>
<td>178,741</td>
<td>3.078</td>
<td>552,239</td>
<td>3.6</td>
</tr>
<tr>
<td>2004</td>
<td>5.7</td>
<td>181,106</td>
<td>2.926</td>
<td>683,555</td>
<td>6.1</td>
</tr>
<tr>
<td>2005</td>
<td>3.2</td>
<td>183,383</td>
<td>2.435</td>
<td>881,754</td>
<td>4.5</td>
</tr>
<tr>
<td>2006</td>
<td>4.0</td>
<td>185,564</td>
<td>2.176</td>
<td>1,086,855</td>
<td>5.1</td>
</tr>
<tr>
<td>2007</td>
<td>6.1</td>
<td>187,642</td>
<td>1.948</td>
<td>1,366,295</td>
<td>5.2</td>
</tr>
<tr>
<td>2008</td>
<td>5.1</td>
<td>189,613</td>
<td>1.835</td>
<td>1,637,924</td>
<td>5.0</td>
</tr>
<tr>
<td>2009</td>
<td>-0.2</td>
<td>191,481</td>
<td>1.998</td>
<td>1,573,395</td>
<td>-0.5</td>
</tr>
</tbody>
</table>

Prepared by: IPEA/BMAC

#### Trends

Brazilian GDP – Changes in Recent Quarters (%)

In relation to the previous quarter

In relation to the same quarter of the previous year

![Graph showing Brazilian GDP changes](image_url)
1. Brazil / macro indicators

Trends

National Consumer Expectation Index (INEC) August 2010
Fixed Base Index. Average for 2001 = 100

Índice Nacional de Expectativa do Consumidor - INEC Agosto 2010
Índice de base fixa. Média de 2001=100

Internet users in Brazil (August 2009)

➢ In August 2009, 37.3 million people used the internet at work or in their homes. This was a 2.3% increase in relation to the 36.5 million reported for July. The number who accessed the internet from work or from their homes rose by 5%, from 44.5 million, to 46.7 million.

➢ The number of people who access the internet from their homes increased 5.4% in August to 29 million. In relation to August 2008, the increase was 19%.

Source: IDOPE Nielsen
1. Brazil / macro indicators

Internet users in Brazil (August 2009)

- 64.8 million people have access to the internet (at home, at work, in schools, lan-
houses, libraries' and telecenters) considering Brazilians 16 years old or older that
have a fixed or mobile phone.

- The categories in which numbers of internet users grew most significantly; both at
work or at home in August in relation to July were: Education and Careers (7.2%
increase); News and Information (4.4%); and Government and Non-Profit
Organizations (2.7%).

Source: IBOPE Nielsen

1. Brazil / macro indicators

HIGHER EDUCATION CENSUS - 2008 (Ministry of Education and Culture - MEC)

HIGHER EDUCATION IN GENERAL

- 2,252 Higher Education Institutions (HEIs) in Brazil
- 90% private; 10% public/state-owned institutions
- The number of enrollments in 2008 was 10.6% times higher than in 2007. In
2008, 5,808,017 (6,050,000) students enrolled in under-graduate
presental and distance-learning courses.

DISTANCE LEARNING (DL)

- 115 institutions offering 647 courses.
- 227,961 students, almost double the number of enrollments in relation to the
previous year
- total number of new enrollments was 42.2% larger than in the previous year
(2007-2008)
- DL students represent 14.3% of total undergraduate enrollments
1. Brazil / macro indicators

HIGHER EDUCATION CENSUS - 2008 (MEC)

Increase in the number of Distance Learning Institutions

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NUMBER OF INSTITUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>25</td>
</tr>
<tr>
<td>2003</td>
<td>37</td>
</tr>
<tr>
<td>2004</td>
<td>45</td>
</tr>
<tr>
<td>2005</td>
<td>61</td>
</tr>
<tr>
<td>2006</td>
<td>77</td>
</tr>
<tr>
<td>2007</td>
<td>97</td>
</tr>
<tr>
<td>2008</td>
<td>115</td>
</tr>
</tbody>
</table>

Source: MEC/INEP/DEEP

1. Brazil / macro indicators

DL at all levels – 2009

- Some 3 million Brazilians engage in Distance Learning
- Of these, 814,183 are undergraduates; between 300,000 and 400,000 are in continuing education; and the remainder in youth and adult education and vocational courses.
- This growth is discernable in the number of under-graduate enrollments: from 2,287 in 2000; to 814,183 in 2009.

Source: MEC/INEP/DEEP
1. Brazil / macro indicators

Primary Education Development Index (IDEB)

In 2007, more than 73% of Brazil’s municipalities achieved or surpassed IDEB goals set in cooperation with MEC.

Status in relation to attainment of IDEB Goals - 2007

<table>
<thead>
<tr>
<th>Situação de atingimento da meta do IDEB, 2007</th>
<th>Municipios %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Não atingiu a meta</td>
<td>951 17.1</td>
</tr>
<tr>
<td>Atingiu a meta</td>
<td>368 6.6</td>
</tr>
<tr>
<td>Superou a meta</td>
<td>3,703 66.6</td>
</tr>
<tr>
<td>Sem informação</td>
<td>542 9.7</td>
</tr>
</tbody>
</table>

2. Censoead.br

Distance learning demand characteristics

Francisco Botehlo - 2010

Management issues have not yet been fully explored in studies on distance learning. They are, nonetheless, fundamental for understanding this system. Development of a sustainable distance learning system entails integration between pedagogical and operational dimensions. Learning and cost-management aspects involved in production and service-provision need to be combined, in order to achieve an economic-financial/quality balance. Maximum quality education is achieved through rational use of the available resources.

Presentation of CensoEAD.br results relating to management issues, highlighting the most significant aspects will be provided under the following topics:

- Distance learning demand characteristics.
- Organizational aspects of distance learning offer.
- Indicators of sustainability (operating costs, investments, drop-out rates, price and profitability).
Characteristics of distance learning demand can be deduced from a target-public profile. Concentrated in the 25 to 39 age group, the majority of students have incomes ranging from 1 to 10 minimum wages. The incomes of the largest proportion (29%) range from 1 to 3 minimum wages per month (Exhibit 2.1). Despite this diversified profile, most distance-learning students are not in the age group that has just completed high school.

The survey also reveals student profile characteristics in terms of origin, and information on the target public. Although 57% of institutions have agreements, covenants or partnerships with public or private corporations to offer courses, 88% stated that they aim to attract an open and universal target public. In other words, though institutions prize agreements with the civil service (70% of such agreements are with government bodies) and private corporations, nonetheless, a majority of students pay for their own courses. Thus, though institutions operate in the corporate market, they keep doors open to the universal market which constitutes their main target public (exhibits 2.2 and 2.3).
The distance-learning market is expanding, and this growth is expected to continue in the coming years. In the past 3 years, 53% of institutions have had over 10% growth in enrollments (Exhibit 2.4). This increase was quite representative in the period from January 2008 to January 2009 (Exhibit 2.5).

The regulatory process establishes parameters that guide supply, serving as "road maps" for institutions. In this regard, there were divergent opinions among CensoEAD.br respondents. A majority (roughly 60%) of institutions claimed they faced no constraints to expansion through the current regulatory processes, but 40% stated that federal or state legislation, state education councils, or class associations hampered their efforts to expand distance learning (Exhibit 2.6).

In the respondents’ opinion, another factor limiting expansion of distance learning was lack of both skilled instructors and support personnel (41% of the respondents).
2. Censoead.br
Organizational aspects of distance learning offer

The institutions presented two important characteristics of their services: a varied supply of courses; and a student support center system. 82% of institutions offer both distance and presentional courses (Exhibit 2.7). 70% have adopted a student support center system (Exhibit 2.8). This aspect of service provision is one of the main features of distance learning in Brazil.

Distance Learning areas at institutions are expanding and gaining independence; while continuing to share services with sectors that traditionally serve presentional courses. For example, they maintain their own academic advisory boards, and present their own balance sheets, while continuing to share marketing, recruitment and admissions office facilities (Exhibit 2.9).
The institutions indicated that their DI structures have not yet been consolidated. 66% stated that courses had undergone organizational restructuring in the past two years; and 73% that they expect to undergo restructuring in the next two years (Exhibit 2.10).

Among the indicators addressed by CensoEAD.br, 2 are permanently used to measure the quality and productivity of education services: number of students per class; and drop-out rate. These indicators are important because they correlate 3 fundamental quantities for organizational sustainability: teachers’ payroll cost; number of credits acquired (income); and number of credits taken by the students (benefits). The significance of these indicators is revealed by the institutions’ answers to questions relating to the subject. 86% seek to limit the number of students per class to 50, on average (Exhibit 2.11).
There is no uniform definition or methodology for recording drop-out rates, thus making comparisons difficult. Although some claim that a higher drop-out rate is to be expected in distance learning, this is hardly a consensus among the scientific community. Though controversies persist, one frequently observed characteristic, confirmed in the CensoEAD.br, is that drop-out is highest in the first semesters of courses (exhibits 2.12).

The significance attributed to drop-out can be discerned from the large number of institutions that conduct surveys on the phenomenon. The main causes identified in such studies are: failure to adapt the distance learning model; and lack of time (exhibits 2.13).
2. Censoead.br
Indicators of sustainability (operating costs, investments, drop-out rates, price and profitability)

The trend toward consistent growth in the distance-learning sector confirms the willingness of institutions to invest in improving and expanding services. 44% of institutions stated they had made significant investments between 2004 and 2009, and 56% stated that they would continue making investments until 2013 (Exhibit 2.14).

Another aspect of distance learning relates to lower prices in comparison to those charged for presental courses. 65% of institutions claim that they charge lower prices for DL courses (Exhibit 2.15). This is one of the main business components contributing toward positive rates of return on investment (Exhibit 2.16).
2. Censoead.br

On managerial issues, the CensoEAD.br findings indicate that distance learning in Brazil has undergone continuous and intense growth. The data also shows the predominance of institutions offering a mix of courses and that maintain students support center systems. Thus, by structuring operations as they gain relevance within institutions, distance learning sectors are improving their management strategies.

3. Prospects and Challenges

Challenges for Brazil

- 82.1% of Brazilian 15 to 17 year olds attend school.
  - 44% have not yet finished Primary Schooling.
  - Only 48% are enrolled in Secondary Schools (i.e., grades corresponding to this age bracket).

- Only 12% of 18 to 24 year olds are at university (a lower proportion than in Argentina and Chile)

- There is a growing lack of specialized labor in essential fields: e.g., engineers, teachers (physics, chemistry, mathematics)
3. Prospects and Challenges

Challenges for Brazil

- Improve the quality of education
  - Quality of Teachers – enhance professional status / training
  - Greater involvement of families (parents) in the education process
  - Education models with a focus on learning
  - Learning management (IDEB, ENEM, ENADE)
  - Infrastructure and materials – utilization of current resources – digital inclusion and use of information and communications technologies (ICTs)
  - Distance Learning (DL) as an important resource for educational development

Prospects for Development of Distance Learning

- The need to advance quantitatively and qualitatively in the education process, so as to achieve sustainable economic development in Brazil
- Public demand, that is not fulfilled by conventional courses
- Expanded access to and increasing use of ICTs (Internet/broad band, cell phones, etc)
Challenges for the Development of Distance Learning

1. Legislation/regulation
2. Integration of technologies - Internet
3. Problems of a newly developing market
   a) Demand – Informing the public about DL
   b) Price/quality
   c) National prices / regional costs
   d) Costs
      i. Course planning and production costs
      ii. Staff costs (especially teachers)
      iii. Technology costs (especially telecommunications)
   e) Supply – Quantity and characteristics

THANK YOU!

Francisco Botelho - fbotelho@ucb.br
칠레 이러닝 시장특성 및 전망

칠레 이러닝대학 연합 부장

Michele Bass
The e-learning Market in Chile

Michele Bass Del Campo
Gerente General UVirtual

Generating of Knowledge across the Virtuality

Michele Bass Del Campo – Gerente General UVirtual
University Network of Institutions in the top Forefront in the integral use of New technologies applied to generation of educational offers, that promote the acquisition of new knowledge and skills in the people.

Conocimiento e Innovación

Universidad Arturo Prat
Universidad de Atacama
Universidad de la Serena
U. Metropolitana de Csas. De la Educación
U. Tecnológica Metropolitana
REUNA
Universidad del Bio-Bío
Universidad Austral
Universidad de los Lagos

www.uvirtual.cl
UVirtual wants to be a leading company of the Latin-American market in the development of permanent training (life long learning)
ACeL: e-Learning Chilean Trade-union

➢ To be a modal of the e-learning industry in Chile and Latin America

USA México Guatemala El Salvador Nicaragua Costa Rica República Dominicana Panamá Colombia Ecuador Perú Bolivia Brasil Paraguay Argentina España Francia Israel
E-learning Definition

- Formation distantly by means of the use of technological platforms, it makes possible the flexibilización of the times of the process of education - learning to the requirements and availabilities of every person and that generates collaborative environments of learning

Servicio Nacional de Capacitación y Empleo
National Employment and Training Service (Gov)
Who are using e-learning in Chile

Management the Knowledge

Formal Learning

Informal Learning
Usuarios Conectados

<table>
<thead>
<tr>
<th>País</th>
<th>Personas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paraguay</td>
<td>11,200</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>25,600</td>
</tr>
<tr>
<td>Honduras</td>
<td>43,500</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>60,280</td>
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<tr>
<td>Guatemala</td>
<td>82,120</td>
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<tr>
<td>Uruguay</td>
<td>84,220</td>
</tr>
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<td>R. Dominicana</td>
<td>91,620</td>
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<tr>
<td>Ecuador</td>
<td>105,420</td>
</tr>
<tr>
<td>Bolivia</td>
<td>149,060</td>
</tr>
<tr>
<td>Perú</td>
<td>204,100</td>
</tr>
<tr>
<td>Argentina</td>
<td>788,120</td>
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<tr>
<td>España</td>
<td>901,640</td>
</tr>
<tr>
<td>Venezuela</td>
<td>1,311,560</td>
</tr>
<tr>
<td>México</td>
<td>1,318,200</td>
</tr>
<tr>
<td>Colombia</td>
<td>3,164,300</td>
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<tr>
<td>Chile</td>
<td>3,275,740</td>
</tr>
<tr>
<td>Estados Unidos</td>
<td>31,979,360</td>
</tr>
</tbody>
</table>

Before Earthquake: 108.733

After Earthquake: 314.900
Key elements in successful development

- Content
- Design Instructional
- Learning Manager System
- Support System

E-learning Market in Chile

- In Company
- Person
- Government
e-learning in the University?

- 1.2% of all students
- 2.2% of the programs in the Universities (9,887)

176 Universities; Colleges; 876,243 students (5%)
Who are developing e-learning?

Universities

Companies

Different Models; Different elements

Training by e-learning

HORAS DE CAPACITACIÓN POR EMPLEADO
CAPACITADO Y AÑO

2008 45 2009 41
Is Chile an interesting Market for e-learning?

➢ There are exceptional companies in designing and implementation of e-learning
➢ Is a little country
➢ The Spanish companies can’t have results
➢ The numbers in training are not very good

Thanks

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mbass@uvirtual.cl
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편집인 | 오 성 근
발행처 | KOTRA
발행일 | 2010년 9월
주 소 | 서울시 서초구 한릉로 13
전 화 | 3460-7114(대표)
홈페이지 | www.kotra.or.kr

* 낙장, 파본은 교환해 드립니다.