

An Assessment of eLearning Market Opportunities in the Government Sector in Thailand

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Abstract

The eLearning market in Thailand has significant activity in all three sectors: corporate, educational and government. In this instance, the scope of work is limited to the government sector.

eLearning is defined as “Learning that takes place in the context of using the Internet and associated web-based applications as the delivery medium for the learning experience.”

The Royal Thai Government has been focusing its efforts to drive Thailand into the knowledge-based society and has committed significant government funding to the development of knowledge management and eLearning. The intention of this paper is to determine the market size of eLearning in the government sector in Thailand in the particular timeframe of the budget year 2005.

The Budget Process

The fiscal year of the Royal Thai Government starts on October 1 and ends on September 30. The Budget Bureau is the agency responsible for compiling all government budget requests, pre-approving them, and submitting them to the relevant bodies to authorize budgets in accordance with the laws. Currently, the Budget Bureau has streamlined and digitized the budgeting process with the target of performance-based budgeting frameworks through GFMIS

(Government Financial Management Information System) resulting in higher efficiency.

The new framework of performance-based budgeting requires that each government agency should carefully define its mission, goals, and objectives. The process of defining the agency mission, goals, and objectives must be led by each agency's top leaders, legislators, and the Cabinet in order to succeed. Key Performance Indicators are identified and followed up by the authority.

Thailand's goal to reach the knowledge-based society is driven under the National IT Policy Framework 2001-2006 or IT2010. The National Information and Communication Technology (NICT) Master Plan is the national strategy developed under the IT2010. IT2010 comprises the five E's: e-Government, e-Commerce, e-Industry, e-Education and e-Society. The five E's have been overlaid against three strategies, the development and promotion of the Thai software industry, the development of IT human resource and the e-Government initiative, and are considered crucial during the first five years (2002-2006) of the plan.

Many initiatives of the Royal Thai Government revolve around the IT infrastructure (eSociety), the IT capacity building (eEducation) and the IT knowledge distribution (eLearning).

Educational Networks and eLearning

The Royal Thai Government is committed to launch a citizen-centric portal which serves as a one-stop government service to be delivered electronically to the Thai citizens. Additionally, the Royal Thai Government has implemented educational networks to link all tertiary-level institutes and all government schools through EdNet comprising UniNet and MOENet. UniNET used to belong to the former Ministry of University Affairs and MOENet to the Ministry of Education before the two were merged in 2002.

ELearning and ICT

Currently 152 tertiary institutes, 413 vocational institutes, and 22,738 schools are wired onto the network. eLearning and Information and Communication Technology (ICT) have been introduced to more than 20,000 schools and academic institutes. Additionally, there are 37 IT Campus with approximately 9,000 students graduating each year. ICT capacity building has been provided to teachers in remote schools with 1,500 teachers trained in Thailand, and 700 trained in Singapore in 2004.

eLearning has the potential to reach out to more people than hitherto possible with conventional learning methods, not only geographically, but demographically. eLearning is a valuable development tool that can reach out to the underprivileged and help build a culture of life-long learning into society at large. It can give those too busy, too poor, too weak or too old an equal opportunity for education and a degree or diploma on which to build a better life for themselves. eLearning is being implemented in many government departments and universities in Thailand and experiments are being undertaken to identify the opportunities for applying e-learning and learn how the benefits may be realized in the context of the NICT Master Plan, eSociety and eEducation.

Three ministries were identified with items directly related to e-Learning for the year October 2004 to September 2005. These are the Ministry of Science and Technology, the Ministry of Information and Communication Technology and the Ministry of Education.

Research methodology

The Ministry of Information and Communication Technology is working on building infrastructure as well as promoting content-building to drive forward the development of knowledge-based society. The Ministry of Science and Technology has the objective of transferring knowledge in Science and Technology from foreign experts and also capturing and nurturing the research of Thai academia. The Ministry of Education is attempting to update their basic curriculum and implementing ICT to facilitate their teaching. The common theme in the strategies for all the ministries is to promote learning and to enhance capacity building for Thais to provide a significant increase in effectiveness in their areas of responsibility.

Knowledge Management and e-learning budget

The budget data below relates to the year 1 October 2004 to 30 September 2005 and the figures are in millions of Thai Baht and converted into USD at the rate of 40 Baht/USD. The total budget for activities that are related to knowledge management in the Ministries of Science and Technology, Information and Communications Technology and Education is USD 58.6 Million. Data from the Budget Bureau's 2005 Compendium of Ministerial Budget Request (in Thai) is used as the primary source for this information.

The Ministry of Science and Technology (MOST) is responsible for scientific knowledge and technological research in Thailand. The MOST plans that

relate to e-learning and other activities total USD 2.7 Million to be undertaken by the Office of the Permanent Secretary and Department of Science Service. The objectives are to manage service delivery of science and technology and to build a knowledge base and improve information services in science and technology to enhance the country's competitiveness.

The Ministry of Information and Communication Technology is responsible for ICT infrastructure and ICT content. The MICT plans that relate to e-learning and other activities total USD 12.88 Million. The objectives are to develop school networks to improve students' ICT skill, to develop contents, to increase ICT access, to deliver government services through ICT centers, to implement the National Information Center to take care of statistical information in three dimensions—Policy, Managerial, and Departmental information for decision-making.

The Ministry of Education is responsible for the national education policy and curricula. The MOE plans related to e-Learning and other activities total USD 43 Million. The objectives are to improve ICT technology in academic delivery, ICT for learning, courseware development and ICT national education network among schools.

Attributes which constitute eLearning are the operating platform and content development. The operating platform for learning is usually called the Learning Management System where contents are kept, maintained and managed. Currently there are prevalent open-sourced systems of LMS available for free download and use. However, our experience in dealing with the educational sector reveals that it is rather hard to populate contents onto the system. Content development is thus critical to the success of eLearning implementation where instructional design is the focal point of success. Once eLearning has been put in place, it is vital to develop course plans for

teachers or trainers to successfully deliver contents based on the course objectives.

Conclusion

Our research has outlined the market size of eLearning needs in the government sector of Thailand for the budget year 2005. It can serve as a baseline of where eLearning stands in Thailand's education sectors.

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