Networking - A survey of Trends and Challenges facing internet-based learning in Europe

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Firstly, let me offer some information about Cedefop , the European agency that helps policy-makers and practitioners of the European Commission, the Member States and social partner organisations across Europe make informed choices about vocational training policy.

Cedefop launched an interactive website the ETV (Electronic Training Village) in July 1998 in an attempt to create a virtual community for all involved in vocational training and human resources development issues. As of January 2001, the village had just over 12 000 residents – identifiable users who have submitted their professional profiles and areas of interest to the site database.

In March 2000, the first eLearning pages were launched on the ETV. Cedefop had decided that the subject of eLearning had grown to be of such importance that a set of discrete services would be of significant interest to its registered users. The aim of establishing the pages was to create a resource centre of information about eLearning, primarily for training practitioners and to use the Village as a space to develop an active community with a shared interest in eLearning. The strategy was to establish a range of experimental services to see what might stimulate registrations and generate increased traffic from existing registered users.

Using online surveys

The online surveys have been used as a tool to collect data on eLearning to fill a clear information gap about how it is developing and people's perspectives of it. The aim is to collect data of interest to specialists and researchers in vocational education and training. The surveys are not a statistical analysis of developments, but aim to collect sufficient quantitative information to provide some insight into the state of certain aspects of eLearning.

In addition to collecting data, the online surveys have encouraged the development of an interactive community. Participation in the surveys has enabled people to express their opinions and to see those of others.

The eLearning surveys conducted have been very carefully structured. Topics have been selected on the basis of issues identified as of particular interest to target groups, such as trainers, universities, enterprises and trade unions. Questions were prepared in consultation with experts in vocational education and training issues in general. Each survey was published online in English, French and German to encourage European participation and left open for 6 weeks. The surveys are publicised in a variety of ways, including direct email and the ETV newsletter. On completion of the survey the data is analysed and a survey report published online in English, French and German.

the topics of the five surveys in 2000.

- the use of technology in learning
- email in eLearning
- report on survey on trainers' skills and eLearning
- survey of economics of eLearning
- eLearning and adult basic skills

Let us now take a brief look at what we learned from the different surveys:

Survey - eLearning and adult basic skills.

590 people responded to this survey; over half from public vocational training organisation, about 205 from private training organisations, the rest was made of of social, voluntary, private non-training firms and others:

Some key messages which emerged from the survey are that there is a high level of optimism about the contribution that eLearning can make to the teaching and learning of basic skills for and among adults. Policy makers and planners are rather more optimistic than teachers. Teacher and trainer skills are insufficient to take advantage of the opportunities offered and teacher skill development remains the most important issue to be addressed. Finally, access to the resources needed to develop teacher and trainer skills is considered lowest among those working in teacher and trainer training.

And what are the challenges for adult basic skills teachers?

The challenge is no longer about having hardware and Internet access for learners and trainers.. Internet access among all respondents appears quite good at 60 per cent. Only 13% describe it as poor. The challenge seems to be more about skills and provision of services to develop teacher and trainer skills.

The table shows that, overall, the eLearning skills of basic skills teachers and trainers were judged to be rather less than good (28 per cent poor, 36 per cent fair). This presents a major challenge to teachers and trainers in upgrading their own skills.

Coming on to take a look at how respondents view the impact of elearning on adult basic skill provision, the picture is overall a positive one. About 1 third stated it would significantly improve and another 3rd stated it would somewhat improve basic skills acquisition among adult leaners. Furthermore, almost 60 per cent said they believe elearning would significantly offer flexibility for diverse learner needs and nearly 90 per cent believe eLearning can offer positive opportunities for supporting the diversity fo learner needs. Policy-makers and planners show a high level of optimism here with an average rating higher than 70 per cent.

Let us take a look at the survey on the economics of elearning.

In the second half of November 271 respondents completed the questionnaire. About half of these were training providers split almost equally betwween public and private training organisations. Some of the main trends which emerge from the survey:

The vast majority (85%) develop content within their own organisations. Yet only 26 per cent said that they ALWAYS develop content. Interestingly, only half the eLearning providers, public and private, develop their own content on all occasions.

66% of the total respondents outsource content development some or all of the time. The majority of people who always outsource the development of *e*Learning content are those who work either as a private or as a public training provider supplying *e*Learning as well as other forms of training. Perhaps the message for eternal providers is: Is this an opportunity to work as partners with providers in content development?

A brief look at responses to the issue of online support and technical support and maintenance.

Online support

Online *e*Learning support comes from within the organisation in 77% of the cases, with only 5.3% always outsourcing online support and 47.6% of respondents outsourcing online support occasionally. 36% of public training providers, 32% of private training providers, and 36% of universities always source their *e*Learning online support from within their own organisations.

Technical support and maintenance

Perhaps somewhat more surprising is the response to questions about technical support. Only 34.4% of the total always provide technical support and maintenance from in-house ranging from 47% of university respondents who said they always provide technical support in-house to 28% of private training providers. 43.6% of the total said they never outsource this type of support.

And the issue of calculating costs:

41.5% of respondents calculate the cost of developing *e*Learning CONTENT by comparing it to the cost of classroom training.

There is quite a large difference between public training providers and universities 45% and 53% respectively, of which compared *e*Learning costs to classroom training costs. This drops to 30% of private training providers. 33.7% of the total calculate it according to a ratio of development time (hours) against learning hours, and again interesting differences appear between groups. 19% and 24% of public training providers and universities use this method and this rises to 40% among private training providers. 15.4% of the total, use the cost of off-the-shelf *e*learning as a benchmark. Of the almost 10% 'Other', most say they don't know or don't have a model or formula developed yet.

Finally what are the major concerns of respondents about the economics of elearning?

- There is strong demand to improve the **value** of content with better pedagogical quality and evidence of improved performance impact, demonstrating real cost effectiveness. Large numbers of respondents expressed concerns about quality and re-usability of content. Concern about the poor quality of current *e*learning offerings is widespread.

> *Message to providers: in an immature market, you may have buyers ready to purchase your offerings even if they are not considered to be of equal quality to current provision (i.e. classroom training) but widespread adoption will be constrained by this quality and significant improvements are*

- There is a strong need among practitioners to develop the necessary skills and to have access to models to calculate return on investment in *e*Learning.

> Message to policy makers and Train the Trainer organisations:
> New skills are required by those involved in training and
> beginning to adopt eLearning; new ROI models need to be
> developed and shared so as to increase effective decision making.

- Support costs added to content costs mean that the overall costs of *e*Learning are often higher than classroom training and there is a strong concern that planners and suppliers underestimate the costs of support.

> Message to policy makers: don't be seduced by messages from
> suppliers that eLearning reduces costs – this is not always the case.

- Many respondents expressed concerns about the cost of support and while recognising its importance in learning effectiveness, also stated that it was essential to ensure that it is economically viable to provide support.

- There is also concern to find and develop skills of online support experts.

> Message to policy makers and practitioners: Education and
> training experts need to develop online moderation skills.

ROI models should take into account that a large proportion of *e*Learning will be utilised with target groups for which there will be no commercial return and these providers need good cost models that reflect their measurement for value criteria.

> Message to policy makers, public providers and social
> enterprises: you too need to develop cost and ROI models.

In the time at my disposal I have barely scratched the surface in examining the data we collected. It lays no claim to being exhaustive but we are convinced that its richness allows us to identify trends and clarify at least a little what is happening with elearning in Europe at present. We shall continue throughout this year to run similar surveys.

Thank you for your attention.