

MAKING LISBON A REALITY

Contribution by the eLearning Industry Group to the mid-term review of the Lisbon Agenda

I. Introduction

The eLearning Industry Group (eLIG), a consortium of 43 leading ICT and eLearning content providers welcomes the opportunity to comment on the conclusions of the Wim Kok report. The eLIG believes that if the EU is to achieve its objective of being the most competitive knowledge-based economy in the world by 2010, there is a need to foster and actively support the widespread deployment and adoption of eLearning throughout Europe, in education, in the home and in industry, especially among SMEs.

Human resources are the Union's main asset and it is now acknowledged that investment in this area is a determining factor of growth and productivity. In today's dynamic environment skills and competencies need to be continuously updated and renewed – lifelong learning must become a reality in a knowledge society. Continuous learning cannot be achieved in the traditional ways only – hence learning needs to be increasingly supported and enhanced by technology. Also access to education and lifelong learning is a key ingredient of a socially inclusive society.

eLearning has the potential to deliver dramatic benefits for society by increasing the speed and degree of dissemination of knowledge, by facilitating knowledge and skills acquisition, by providing flexible learning opportunities for students and citizens, personalising learning and by creating new collaborative learning opportunities. eLearning is an efficient and cost effective tool for fostering workforce development, it can lead to cost savings through better utilisation of a users time, efficiencies in personnel resources in institutions providing education and training as well as reductions in physical requirements.

Despite significant investments having been made by both public and private sectors to deploy technology-enabled new learning approaches, overall broad-based implementation lags significantly behind original expectations. Many models have been tested, some have been quite successful in terms of market take-up, building capacity and raising competitiveness; other models have been outright failures. Far more publicity has been given to the failures than to the successes. The result is that eLearning is far from being mainstream in our society and economy, even though the successes show promise for making Lisbon a reality. As indicated in the interim report on the implementation of the Education and Training 2010 work programme while indicators are pointing towards a more rapid penetration of eLearning in Europe, much more needs to be done to achieve a true breakthrough and this will only come about with correct policy responses at European, member state and local level.

In that connection we note that the Council on 10 December 2004 adopted a Resolution entitled Looking into the future of Information and Communication Technologies (ICT) and acknowledged that “there is a clear need at European and national level to review and, where necessary, improve policies in order to increase the take-up and deployment of ICT across society as a whole.” We fully support this conclusion. We also support the Commission, which in its consultation document on a Framework Programme for Competitiveness and Innovation stated that “public intervention is needed to demonstrate that ICT use can improve the efficiency and quality of services”.

eLIG strongly agrees with the conclusions of the Wim Kok report that the implementation of the Lisbon strategy is even more urgent today and that there can be no room for complacency. Not only will eLearning opportunities generate additional demand for content delivered through information networks, but eLearning applications will also permit citizens – whether in traditional educational settings, the workplace or at home – to acquire and enhance **skills needed for the knowledge-based society**.

Given the inherent dynamics of a global knowledge society new learning concepts and in particular eLearning need to be embedded in the conception and design of all major projects involving change. This requires a holistic approach that recognizes lifelong learning as embracing learning in schools, colleges, universities, in the workplace and in the community. Once conceptualized in this way, strategies to develop the potential of eLearning can be implemented across all sectors simultaneously. The Wim Kok report refers to the ‘conflicting priorities’ of Member States that resulted in part, in the poor delivery of the Lisbon Strategy. However, it is vital that in understanding the all-embracing nature of lifelong learning, that all sectors that contribute to the lifelong learner are prioritized simultaneously. Continuing education is an important element in the creation and maintenance of a knowledge-based society in which all citizens have the right to participate. IT literacy and the increased use of flexible, interoperable, individualized and lifelong learning solutions – where eLearning offers its maximum added value – are essential to develop the skills that are necessary in a knowledge-based society.

II. Importance of eLearning to achieve the Lisbon goals

At the European Council in Lisbon in March 2000, the Heads of State and Government identified ICTs, Information and Communications Technologies including eLearning, as a key component to achieving the Lisbon strategy. The importance of ICTs, including eLearning stems both from the contribution, which they can make to overall economic performance, and also from the benefits, which they can offer society at large.

Increasing participation rates in education and training are considered necessary for **social cohesion** and the development of the learning society. The notion of a 'Learning Society' suggests that social integration increasingly depends on the participation of all citizens in education and training. At the same time it is accepted as a means to overcome social inequality and to prevent social exclusion. Evidence demonstrates that the use of ICTs in continuing education can overcome barriers and enhance the participation of marginalised groups. Online learning communities and the use of eLearning tools have been proven to enhance social cohesion and social capital links between European citizens by forming virtual, learner-centric learning communities. The notion of learning centres as individual institutions is replaced by the notion of the institution as a network, independent of time and place.

The importance of dealing with the **transformation of work** and **continuing adult education** is recognised by all. In this context it has become obvious that technology is a key enabler of all human activities to acquire knowledge and build skills. The vast majority of knowledge acquisition happens outside formal settings and planned courses. Research indicates that this is true for 80 % of what people actually learn. New communication and collaboration technologies can enhance the learning process “on the job” or as part of our lives. It is essential that businesses have a full understanding of the need to train their employees and the implications of failing to do so. **Employee development** is essential for day-to-day business. Learning must be the focus not only for large corporations but also, and in particular for European SMEs. *eLearning* is an efficient and cost effective tool for fostering workforce development.

Skills strategies of member state Governments and associated development action plans are vital to ensure the mobility of workers and to close the ICT user skills gap. Such strategies including *eLearning* will enable Governments to keep the labour force up to date with economic requirements by arming them with the knowledge they need through training tailored to each employee’s requirements. New learning methods and especially *eLearning* can help to integrate the workforce in a quickly changing working environment and also enhance their prospects for employment. *eLearning* can facilitate major organisational changes in all sectors.

The reform of **educators’ training**¹ through the use of new technologies is an urgent task considering the radical transformation of learning environments that is taking place in today’s knowledge-based society. A new learning paradigm is in the making. These changes have generated new types of learners, new processes of learning and new approaches to the evaluation of learning, which in turn have contributed to a change in teaching methods and in the role of teachers. Teachers/tutors are no longer only dispensers of knowledge but rather proactive facilitators who promote collaborative knowledge-building and guide students to learn in a variety of environments, to navigate within and process a multitude of information resources, and to use these resources in solving problems and making decisions on their own. The importance of the proactive involvement of teachers through the use of new technologies for the quality of the education system has also been shown by the recently published PISA study². Change is also required in how schools are designed, both architecturally and in the processes by which they are run. The reform of teacher training needs to be extended to include school management, leadership and the management of change.

eLearning provides a basis for **personalised professional development** necessary for innovation, economic development and wealth creation in society. The application of new learning methods can result in a better understanding and retention of content by students, thus reducing failure rates. It also enables educational institutions at all levels to be more effective (both on a pedagogical and cost basis) in coping with the ever-increasing numbers of students, within the continuing constraints of an existing infrastructure. The Training Magazine reports that educational institutions and corporations can save between 50-70% when augmenting instructor-led training with *eLearning* content.

New roles for educational institutions will emerge to support the requirements for lifelong learning of citizens – this will need increased deployment of technology.

¹ By educators we mean teachers in all levels of education, educational leaders/managers and tutors.

² http://www.oecd.org/document/28/0,2340,en_2649_34487_34010524_1_1_1_1,00.html

Finally, *eLearning* has become an important tool for developing the new knowledge society competencies that Europe needs on a large scale. *eLearning* is creating new **business development opportunities and improving competitiveness**. *eLearning* is under-utilised as a strategic tool for customer and partner education. The use of *eLearning* as a marketing and sales tool has been successfully piloted by several large, small and medium-sized businesses. It can have a direct effect on the bottom-line: e.g. faster time to market, sale of higher-margin products and services, decreased support costs. Further awareness raising and investment in the development of this application domain for *eLearning* will positively affect the adoption rate, especially by SMEs. Moreover, *eLearning* can lead to cost savings through better utilization of users' time, efficiencies in personnel resources in institutions providing the *eLearning* services as well as reductions in physical requirements (such as the need for fewer classrooms).

By fostering the widespread deployment of *eLearning* solutions Europe could seize the opportunity to develop a new innovative industry and become a **leader** in this new area. The adoption of co-ordinated action plans at European and national level would stimulate the ICT and digital content markets in Europe, thus enabling the EU to further develop its Software and Services industry in this emerging market. A strong *eLearning* Industry would become a key engine in helping to achieve the Lisbon objectives.

While *eLearning* is far from being mainstream in Europe at present, this is changing. The corporate market opportunity for *eLearning* is expected to exceed US\$20 billion by 2008. Within this market, the opportunity in Europe, Middle East and Africa is expected to grow 30% CAGR from 2003 to 2008, considerably faster than the growth rates projected for the Americas and Asia Pacific, to a US\$3.5 billion opportunity by 2008.³

III. Recommendations of the *eLearning* Industry Group

Establish a Task Force to draw-up and coordinate a Strategy and Action Plans to accelerate the mass deployment of *eLearning* throughout Europe.

The eLIG strongly recommends **the establishment of a Task Force** consisting of educational and training institutions, relevant Commission Directorates, member state representatives and representatives of the *eLearning* Industry Group to draw-up and coordinate a Strategy and Action Plans to accelerate the mass deployment of *eLearning* throughout Europe.

Given the many facets of *eLearning* and the fact that it crosses many competencies of different public sector bodies and other stakeholders ranging from Education, Employment, Research to Enterprise Policy the eLIG also recommends that responsibility for the implementation and monitoring of all *eLearning* activities is coordinated within the Commission to ensure that more synergy is achieved between all the different players.

The Action Plan should consist of both EU and national level activities to promote the deployment of *eLearning* among different learner groups among the entire EU population, business included. Bearing in mind the lower take-up levels of ICTs generally in the new

³ Source: IDC, Worldwide and US Corporate e-learning 2004-2008 Forecast: Behind the Scenes with e-learning, a Business enabler, page 13.)

member states and the accession states, particular attention should be paid to facilitating the take-up of *eLearning* in these countries. The strategy should also be linked to a European skills strategy including the mechanism for implementing such a strategy with workforce development initiatives such as ICT literacy, education for the unemployed, entrepreneurship education etc. The strategy for education, specifically the schools sector, should include funding proposals that support comprehensive ICTs provision and recognize the need for long term commitment and to the updating and enhancement of such provision.

Any such strategy should benchmark the take-up of *eLearning* among all groups including policies in support of *eLearning* at European and National level and set clearly defined goals with measurable targets.

The eLIG considers that the Action Plan should as a priority focus on the following issues/activities.

i. Public authority intervention is required to demonstrate and promote the benefits of *eLearning* and also to stimulate the market

As acknowledged by the Commission in its consultation document on a Framework Programme for Competitiveness and Innovation where system/market failures risk hindering the achievement of the Lisbon goal public authorities ought to intervene. In that connection the eLIG believes that public funding is required to demonstrate and promote the benefits of *eLearning* to all communities via large-scale test/deployment actions.

There is a critical requirement to introduce ICT more effectively into working life and especially into teaching and learning. The European population needs to be 'e-enabled' to take advantage of the use of technology. One way to achieve this is to provide for several large-scale demonstrator projects in chosen application domains such as the science teaching. The "living labs" approach could be a vehicle to achieve this. Applying known technologies in the design of novel learning methods centred on empowering the individual learners, giving them access to learning resources and fostering interaction amongst communities, to build on the common processes fundamental to developing an understanding of the subject knowledge. All the technology to do this exists now but it is its use in the chosen applications that needs to be demonstrated in action and at scale to capture the imagination of all stakeholders involved.

Once this is achieved we can expect to see further demand for new tools growing with the expectations of learners and educators alike. The advantages would transfer to the working environment where people would expect to continue to have easy access to resources to assist in job functions. Success with the demonstrator projects would stimulate the new knowledge based industries.

A major reason for the slow take-up of *eLearning* in Europe is that public investments generally have been significantly imbalanced between connectivity and hardware tools to access the internet on the one side and between software and services, including teacher training on the other. The rollout-out and availability of access tools such as PCs and broadband is a prerequisite, but the real added value in terms of capacity building is only achieved by applying good quality pedagogical content and appropriate teacher training in an interoperable IT architecture environment. The provision, maintenance and enhancement of this architecture to take advantages of WiFi and new wireless capabilities such as WiMAX is a continual process and requires adequate and sustained funding. The allocation and use of

public investment in this context should be based on a coherent strategy in order to maximise the benefits to the end users. Public authorities can also help to accelerate the deployment of *eLearning* by using their purchasing power to aggregate demand and provide a crucial pull for new networks. In addition, public authorities can and should lead by example by designing and implementing *eLearning* policies and techniques for their own employees.

ii. Address the challenges faced by the content industry

The provision of quality pedagogical cross-media, cross platform content in digital multilingual format covering all member states results in extremely high fixed costs, which must be recouped in order for the industry to develop. Public commitment can help here in the short term, pending the development of better models of content generation, which make minority language markets easier to support in the long term. Without interim public support, especially to SMEs and smaller content providers, there will be inexorable pressure to serve only the most profitable language markets, which is not in the long-term interest of Europe. Public Private partnering arrangements may provide opportunities for effective clarification of need and for the efficient development of appropriate *eLearning* toolsets and resources. Sustainable business models for educational content creators should be developed where licensing and rights management issues are solved.

The creative content sector is the true added value to the information society and Europe must foster innovation, growth and prosperity for this industry in the Lisbon process.

While Europe's linguistic diversity must be cherished, it should be recognised that it is also a challenge to the development of a more homogeneous European educational content industry. If the EU is to promote the European dimension of education in a multilingual and multicultural context, greater and significant resources must be allocated to the development of pedagogical content. Research and supporting activities need to be undertaken to establish a European market for learning content. Important unsolved topics are in technologies and standards for content to be reused for different purposes in different education settings, blends and business environments. This includes semantic models and infrastructures for rich content description, licensing, property rights management, contracting, and royalty accounting. In respect to the high costs for high-quality content production reuse, repurposing as well as flexible business models for content exploitation are highly important, as well as for content producers, value-added service providers and consumers. Therefore, *eLearning* content must become "intelligent" content in an enhanced web-based global infrastructure ensuring fair business. Such infrastructure would also foster informal learning settings, where the borders between Knowledge Management and Learning disappear.

iii. Committing to open *eLearning* Standards

The proper implementation of open ICT and *eLearning* Standards is essential to foster the wide deployment of *eLearning* solutions. In order to create an interactive, interoperable learning environment for all, *eLearning* tools and services should be based upon open standards. Too often *eLearning* solutions "lock-in" users to single vendor solutions. Europe has the opportunity, through commitment to open standards, to lead in helping *eLearning* to reach the tipping point where new technologies move into mass diffusion and profoundly change existing usage patterns, application and business models. Deployment of an interoperable *eLearning* technology architecture based on open standards and proper implementation of open standards need to be high on the *eLearning* strategy and need to be

reflected in the public procurement standards within the European Community and benchmarked accordingly.

iv. More focus on training educators and innovation catalysts⁴

The *eLIG* believes that it is essential to review current educator training programmes and their appropriateness for the advent of the knowledge society. The obvious enabling technologies here are *eLearning* and use of ICT in schools, universities and businesses. The transformation of our educational and training systems – and new opportunities and ways to learn outside of traditional classroom settings – is one of the largest challenges facing Europe today. Teachers, trainers, mentors, school leaders and subject matter experts will have new roles to play, and they should participate actively in helping other stakeholders understand the implications of new models of *eLearning*, particularly at primary and secondary school levels. At the same time, a review of schools' structures and processes and a strong focus on leadership and the management of change in schools are also required. With the rising availability of Free/Libre Open Source Software, there has grown a need to train Educators on how to objectively evaluate these potential solutions and on how to adapt their procurement processes accordingly.

Educators are directly involved in the learning process. There is however an equally important need for training other actors in the learning ecosystem. Innovation catalysts like Chambers of Commerce, Regional Innovation Clusters, Sector & Industry Associations, or Unions, or any other intermediaries that act as a funnel and amplifier between innovators and (potential) adopters, have a key role in the successful adoption of *eLearning*. SMEs as drivers of Europe's growth can benefit greatly from better understanding the strategic use of *eLearning* to drive their business. The training and awareness raising of all these actors must thus be high on the agenda.

Some of the challenges faced in the policies areas mentioned above should ideally be addressed through public-private partnerships. Governments, public administrations, and industry must work together to accelerate the deployment of *eLearning* for compulsory education, post secondary study and lifelong learning. Special attention must be paid to establish consistent and comprehensive *eLearning* strategies at EU, national and local level.

The *eLearning* Industry Group is also willing to play an active role in helping to achieve these objectives either in a consultative role to governments in drawing up strategies, as an implementation partner for pilot demonstrations or as a catalyst providing examples of good practices via work shops and conferences.

⁴ The services of innovation catalysts can include: • network (community) building • user & developer recruitment • marketing & awareness raising • communication between innovators and (potential) adopters • training & support • R&D • policy making



The **eLearning Industry Group**, eLIG is an open consortium of leading ICT and eLearning content providers established with the support of Commissioner Reding to promote the development and deployment of eLearning throughout Europe. The eLIG now consists of 43 members and represents a broad spectrum of interest. Among the sectors represented are: Telecommunications, Computing, Software, Publishing & Media, Educational Institutions, eLearning Services, Professional Associations, Research Institutes and Industry Association. It has also established a close working relationship with the European Association of Distance Teaching Universities, EADTU.

Core Group (17)

Accenture
Apple
Cisco
DLGI
Editis
EduData
Giunti Interactive Labs
IBM
Intel
Microsoft
Nokia
PAU Education
SanomaWSOY
SAP
Sun Microsystems
U&I Learning
Wolters Kluwer Education

Consultation Group (26)

Auralog
Austrian Computer Society
Bertelsmann Foundation
C2K
Cambridge-Hitachi
CeLeKT - MSI Växjö University
CEPIS
Compact
CompTIA
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Fraunhofer-Institute Industrial Engineering (FhG-IAO)
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