Krisztián Forrai
Oktopusz Foundation
forrai.krisztian@oktopusz.hu

A FIRST HAND LOOK AT THE STATE OF E-LEARNING IN CEE COUNTRIES

Introduction

The non-profit organization Oktopusz Foundation, dedicated to heightening the awareness of e-learning, carried out a survey amongst e-learning professionals and practitioners in the CEE region during the summer and winter of 2003. The aim of the survey was to explore and gather first hand information about the level and nature of employment of e-learning in these countries.

Our preliminary research confirmed our assumption that there was little relevant and valid data available about the state of e-learning in Central Europe. But since the same could be told about the European e-learning market (or in fact, any kind of market) we decided for another approach: focusing on practitioner's direct experiences and knowledge about e-learning deployment. The results, while they may not be 100% statistically valid, definitely present a revealing overview of the state of e-learning in CEE countries. We believe that by putting these countries' experiences into a wider context this overview will serve as a beneficial starting point to a better understanding of e-learning deployment as well as allowing us to gain new perspectives into the possibilities of enhancement in the CEE region. Since the results will be published and distributed amongst the participants of the survey and the foundation's partners it may contribute to the open flow of information and common understanding of the e-learning state of affairs. In addition, we hope that the quality information sourced from this survey helps to stimulate the efforts of cooperation between CEE countries – and also a catching up with EU standards in the field of e-learning.

The survey was based on a multiple choice questionnaire containing 85 elements grouped into five areas: Personal view, Usage, E-learning solutions, E-learning market, E-learning initiatives. The questions touched upon every aspect of e-learning from user attitudes and a detailed user profiling to the range and division of the market. In addition, the recipients of the questionnaire were asked to share their outlook on e-learning, identifying the areas where they thought progress was needed and outlining their expectations for the future of e-learning in their countries. The 231 recipients were selected from the foundation's list of contacts as well as from other related professional lists (such as the Who's who? pages of the European Forum for Vocational Education and Training) and internet sources. The countries that we targeted with our survey were Byelorussia (4), Bulgaria (48), Czech Republic (29), Croatia (24), Poland (43), Romania (35), Serbia (3), Slovakia (16), Slovenia

(22) and Ukraine (7). The private sector was represented by 34,8% of the recipients, while 65,2% of them worked in the academic/non-profit sector. The professional positions of the recipients included company CEO, HR director, lecturer, researcher, trainer and university professor, while their fields of activities related to e-learning included tutoring, course developing, course administration, curriculum designing, developing e-learning strategies, supervising e-learning education. Many of the recipients work for NGOs or governmental bodies of education or are taking part in EU-funded projects, such as MISSION and PHARE. The questionnaires were sent out by e-mail which enabled direct feedback from the parties and clarifications on data on our part where needed.

General Findings

When we define e-learning in its broadest form, i. e. is learning via electronic means, it has been used for about a decade in CEE countries. If we identify e-learning as online learning, its past goes back to the last couple of years only. As we saw in the survey, e-learning is most commonly referred to as learning content on a CD-ROM as well as web-based learning materials. The most established mode of e-learning delivery is the Internet, followed closely by CD-ROM and the intranet. Apparently, the use of educational software and courseware is about 40% less prevalent then CD-ROMs and the internet.

The age group of the most typical e-learning user falls between 18-35 years, which correlates with the finding that e-learning is used predominantly by university students and young employees – i. e. universities are "hotbeds" for both developing and the buying of e-learning, usually in the form of PPP or funding from EU/World Bank or other outside sources; while larger companies – in the IT (and other technical), financial and business sectors are the ones that can afford to deploy e-learning in their training. Still, if we look at the rate of e-learning deployment by sectors we find that the corporate sector is about half as big (25%) as the educational sector (45%). Significantly, one fifth of total e-learning deployment comes from individuals in the form of self study within an adult learning program. (The rate of users accessing e-learning from their workplace and from their home is almost evenly balanced.) Apart from educational institutions and the corporate and business world, e-learning is present in a wide array of sectors, from HR to healthcare – and the obvious difference of the CEE countries from Western European countries is the significant level of deployment in tourism, and the rather disappointingly low level of deployment in governmental sectors. As for e-learning subject areas, the most widely available and used is language learning, which is another unique characteristic for CEE countries, this being followed by IT, academic/school subjects and subjects of general interest (although this latter category is less widely used than available).

"Content in e-learning is king", as all the American and European e-learning experts would say, and this is definitely true for the CEE countries. This is by far the largest and most profitable segment of the e-learning markets (where content development is the leading segment, and even at the level of services the majority is

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linked to content) and it is almost two times bigger than the e-learning platform market. The most established way to obtain e-learning content is by in-house development, although custom and off-the-shelf content are closely behind. The source of content is most of the time domestic, and localization is not favoured in the CEE region (only one third of all content comes from localization.) This can be explained on the one hand by the weaknesses of the CEE economies and the small size of the market, which makes localization costly for foreign e-learning providers – especially online training vendors, for whom the CEE region is not yet a target. The only area where localization is a favourable option is IT training – this is mainly because IT material only needs to be translated and not adapted to a cultural context (amongst other factors). Because of insignificant market opportunities, global providers are scarcely present or have e-learning activities (such as via multinational IT companies) in CEE countries: BrainBench, ExecuTrain, Global Learning Alliance and ProsoftTraining are the main players who have ventured into CEE territory. The total number trying to make money on e-learning are around ten, at most, in any country of the region, and they supply training for a couple of hundred thousand people.

The survey shows that within the platform segment learning management systems and learning content management systems are deployed on an almost equal scale. It was surprising to learn that a wide variety of tools and applications are available, eg. virtual classroom, video/web conferencing, digital library, digital portfolio, exercise/test pools, whiteboards. However, only virtual classroom applications are actually used to the extent of needing a mention.

The data we could gather from the survey is insufficient to make even conservative estimations about the size of the CEE e-learning market; however, we can assert that it is a miniscule one, and it is homogeneous in its nature since all countries have almost identical characteristics.

The most notable feature of the divide between the public and private sectors in these countries is the fact that e-learning users at universities have only faint ideas about corporate e-learning, and vice versa. There is practically no information shared or communication to or from these two areas. In the Czech Republic, for instance, a practitioner managing a pure e-learning company provided us with the highly unlikely estimate that 80% of e-learning activity in the country takes place in the private sector. Other numbers he listed were: the total number/percentage of the organizations that provide e-learning (15); the total number of pure e-learning companies (approx. 15); the total number of e-learning content vendors (approx. 20); the total number of e-learning platform vendors (approx. 8).

However, most of the market players are unable to make estimates – even inaccurate ones – about either the size and value of the market in their country or the size or number of e-learning companies and vendors; whereas they tend to agree on the groups targeted by these firms and organizations. The two most prominent contexts in which e-learning has actually started spreading are those of university students and adult learning. This insight coincides with another strong and concordant opinion: that the public and the private sectors are by far the most extensive areas in which e-learning flourishes, though the difference between the actual size of these

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two is, though indefinable, irrelevantly tiny. E-learning, even if to a smaller extent is, also deployed for vocational training and self training, ranking third and fourth as to their dominancy. Any other aims of e-learning use is rarer by order of magnitude.

Government initiatives aimed at the heightening of e-learning are rare in the region. Most of the few examples were/are concerned with increasing the quantity of computers and the quality of infrastructure – and are primly directed towards educational institutions or public community telehouses, (like the "Sulinet" program in Hungary and are very similar in Poland). Operation of the field is strongly influenced by here being a lack of standards and government policy-making of professional bodies competent in assessment, formation of methodologies and other general issues.

The importance of these shortcomings also dominate the last, and supposedly the most revealing passage of the questionnaire. In this, the respondents were invited to identify the areas where they thought progress was needed in the field of e-learning in their countries. Here, the most characteristic views touched upon international cooperation in field of content, standardization of programmes, research into needs, cost cutting in the development of e-learning programs, measuring quality, coherent national strategy, assessment criteria for e-learning systems, content development, course certification, pedagogical principles, support for implementation and development of an e-learning system, and transcultural communication issues.

Summary

The general attributes of this region include a belated start and thus short history of e-learning, which fact explains some of the shortcomings of the tools and services produced. The other distinctive feature of e-learning in CEE is size. The nature and dynamics of markets are entirely different in these countries than on a global scale, as demand is of a much lesser scale. E-learning in higher education does not lag that much behind corporate e-learning regarding the number of programs, as it globally does. Government support has defined and formed the first solutions available at universities – which were predominantly technical institutions. E-learning is used for mostly the same purposes as anywhere else in the world, but is done so with marked lack of data, statistics or any transparency. Minor differences as to subjects include the more important role of e-learning in language teaching, and as to production, the more important role of in-house created materials. Regarding delivery, the most popular ways, according our survey, proved to be the web and CD-ROM.