



Survey

E-LEARNING IN EUROPE

**Noir sur Blanc
2001**

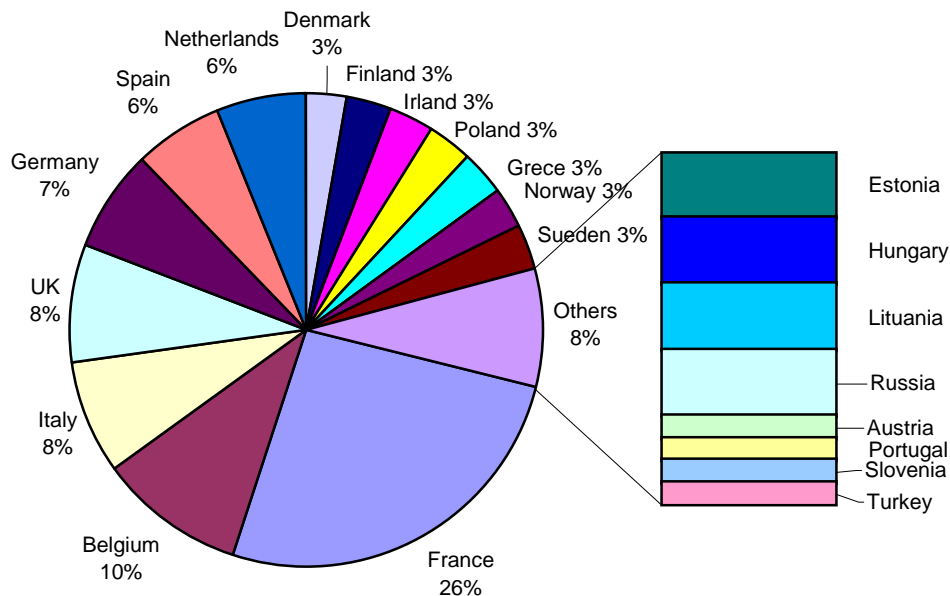
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INTRODUCTION

Since the early nineties, in the wake of working from home, e-learning has been regularly represented as an emerging market. In the same way, the development of the multimedia industry within, in particular, the leisure sector and education has regularly provided technological innovation.

The Noir sur Blanc agency has chosen to launch a far reaching survey by contacting thousands of institutions, based all over Europe, in order to attempt to build a step by step assessment of e-learning's presence in higher education institutions. The survey's results were compiled from a sample of 120 institutions.

Countries represented



In the context of a new economy that seems quite "depressed", this survey's results reflect the main market trends as highlighted in May 2001, during the World Education Market in Vancouver : a market that offers promising prospects in the long-term even if for the moment, educational figures see this period as an experimentation phase that can discourage the more eager investor.

Hours of e-learning cursus

*52 valid observations (more than half unanswered)
average: around 400 hours
minimum : 0 hours; maximum : 6000 hours*

number of students concerned

*69 valid observations
average : around 700 students (median: 200)
minimum : 0 students ; maximum : 7500 students*

Thus, in a domain where applications are still mostly experimental, the questionnaire sought to complete each series of closed questions with open questions. This permitted the quantitative approach to be enriched with a qualitative analysis.

This analysis deals with the global approach of the sector, e-learning's impact in educational institutions, the analysis of the contents of e-learning programs and finally, the market prospects.

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⇒ *the three groups of institutions : resistant / passive / integrated*

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⇒ *the three curbs : teacher implication / risk of isolation/ heterogeneous public*

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⇒ *the three fields : natural / applied / experimental*

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⇒ *two tendencies : universalisation or knowledge merchandising?*

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1. E-learning in Europe : GLOBAL APPROACH

11. E-learning perception

Due to the nature of our investigation, it seemed indispensable to proceed with an *in abstracto* picture of our sample's perception of e-learning.

We naturally remark a strong association of the word with the use of new communication technologies in the world of education (67.5 % cite mostly this definition and 20 % consider it as in part applicable). Here, the notion of education is considered in a general sense, because in its literal sense, it would be defined as "learning" and not "teaching". This language precaution does not only reflect the preoccupation of proceeding to a conformity of translation but also permits the highlighting of a prominent aspect revealed by this survey: the specific place devoted to the student¹ in the e-learning process.

More precisely, the questioned institutions establish a close relationship with the use of on-line technologies, with Internet at the forefront, followed by Intranet (respectively around 62 % and 41 % of the answers). This confirms the lack of success (25,8 % of the answers) attributed to the definition of e-learning as distance education, without reference to all aspects technological.

Finally, it is revealed that e-learning seems not to be separable from education, more as a complementary tool to traditional teaching methods. Only 10 % of the respondents do not share this view.

12. E-learning appreciation

The questionnaire wanted to gauge the differing points of views expressed by teachers and students, in terms of reactions when faced with the possible disruption that e-learning might bring to their institutions. However, we should precise that responses came not only from professors but also from administration departments. Therefore, the responses reveal a feeling rather than a completely scientific picture.

¹ Throughout this document, the general word "student" will be used. The word "student" will cover the public concerned by e-learning, from primary to higher education, in universities or Grandes Ecoles, in initial or continuous training.

With this in mind, we observe that when asked the question "from your point of view, do teachers prefer traditional educational and research methods", only 31 % answered "yes." Thanks to the "mostly" (46,7 %) and the "in a sense" (21,7 %) that can be classed with the "yes" responses, there is not a noticeable negative reaction to this question (only 5 % of the answers). As far as the teaching staff are concerned, attitudes expressed mix desire for openness with prudence.

If we compare these statistics to those of the students, the result is virtually the same. However, when precise answers are dealt with the gap become more marked: only 18,3 % of the students would show a preference for traditional methods, 11,7 % of them thinking the contrary.

Above all, students consider e-learning as a complementary tool, appreciated in the first instance for its practical nature, then for its pedagogical dimension.

13. E-learning implication

With such different approaches, it is to be expected that the results are particularly contrasted. They allow the establishment of a general classification presented in ascending order of interest.

Group 1: resistant institutions

This first group represents just 10 % of the sample. It is quite homogeneous, in the sense that the "no" answers rate reveals a non-expressed or non-existent state of e-learning. This can be seen in the answers to the open questions.

We cannot consider that this group is solely composed of opponents to the use of new communication technology in educational institutions. Nevertheless, according to the tone of some answers we can see a sort of "cultural fracture". That testifies more to the real incomprehension towards the new prospects of e-learning than to a hostility present in these institutions. Classical pedagogy has proved its efficiency, but why not add complementary technological "gadgets" to it?

Group 2: passive institutions

The second group, which is the majority (52 % of the sample), sees e-learning as a reality even if it is still playing a secondary role in the concerned institutions.

Nevertheless, they do not intend to resist this technological wave. Even if we cannot yet talk about an organised adhesion in favour of the e-learning development, initiatives are increasing. It clearly appears (around 60 % of cases) that existing programs come from individual initiatives. 60 % of these programs rely entirely on internal institutional resources ; partnerships are still rare and little structured.

Group 3 : integrated institutions

Unlike the others, this last group (around 36 % of the sample) considers that e-learning has an important role in actual teaching methods. In addition, the same percentage felt that e-learning is in a position to compete with traditional teaching. However, this last comment must be qualified by the fact that three distinct approaches are present in this group :

- extensive e-learning strategy

This is how we can qualify the choice of extending e-learning practice to several subjects taught in institutions. It is mostly conveyed by a time volume (hourly volume) or programs (percentages) dedicated to e-learning. Otherwise, in the most formal situations this is calculated by ECTS² criteria.

- intensive e-learning strategy

A resolutely different approach characterizes the use of intensive e-learning. In fact, if it can be globally considered as a complementary method, it is strongly focused on some subjects and can occupy 100 % of teaching methods. Naturally, this intensive strategy concerns fields that are founded on the use of new communication technology, namely multimedia development or e-business.

Consequently, if in most of the cases, e-learning is still an addition to traditional methods, a third category exists:

- integrated e-learning strategy

These institutions, which are still a minority (5 %), have adopted a very offensive strategy: e-learning has become the main axe of their teaching methods. It is no longer used as a complementary tool. In addition, the whole administrative and pedagogical organization is structured around e-learning.

The activities lead by these institutions call for more detailed comment.

² European Credit Transfer System

2. E-learning in Europe : IMPACT ANALYSIS

21. Motivation factors

A sharper approach permits the market strategy that supports e-learning to be revealed. As the motivations behind such a commitment are at the heart of this survey, it seems indispensable to present the results obtained. As far as these motivations are concerned, the answers fall into seven different arguments presented below in declining order :

1. *Offer a competitive deal in continuing education (76,7 %)³*
2. *Gain competitive advantages (75,8 %)*
3. *Diversify the range of educational products on offer (75 %)*

The first finding is the widely shared desire to conquer the adult education market. With reference to this, the institutions' attitude is quite homogeneous: the added value of this new tool mainly resides in its capacity to attract new publics, thanks to a diversified offer of teaching modules. These are accessible to all via e-learning.

4. *Attract an international audience (66,7 %)*
5. *Attract a greater number of students (64,1 %)*
6. *Set and standardise the content of teaching (52,5 %)*

The second group of motivations confirm this will to attract shares of the teaching market. It should be noted that this refers to an international market. A competitive strategy must operate at this level, even from a pedagogical perspective. This view is supported by a little more than half of the sample. However, this means that a little less than half of the sample were not in agreement, underlining the "cultural fracture." We can notice an appreciable difference between the views of an administrative manager and those of a teacher, who is more attached to the cultural specificity of his/her activity. These two diverging visions highlight one of the key points of e-learning development strategy.

³ These figures correspond to the total of "yes" and "partially" answers to each question

7. Limit the production costs of teaching (24,2 %)

The cost factor is the category that records the least votes. However, a detailed analysis allows two main and contrasting attitudes to be identified. On the one hand, there are those who consider financial aspects as unimportant, because due to high investment, these are seen more as a curb than as a motivation. On the other hand, there are those for whom the question is secondary due to the various advantages of the e-learning development.

22. Comparative advantages

With regards to traditional teaching methods, e-learning generates a real about-turn in perspective. From a vertical hierarchical logic (teacher / student), we leap to a cooperative and flexible logic (coach, tutor / student). At least this is how e-learning theoreticians conceive new communication technology in teaching.

From a hierarchical logic to a cooperative logic...

In this context, the notion of "learning" shows its true meaning as it is a real overturning of traditional teaching and knowledge acquisition processes. Two well established roles are put into question: the student has now acquired more responsibility in the learning process. It is no longer his/her participation that is required, but a whole contribution. Because e-learning permits teaching to be adapted to individual needs and that modular course structures encourage student autonomy and self-learning, the learner becomes more a partner than a subordinate.

With the introduction of e-learning, there is an evolution of the teaching processes since the teacher becomes more a coach, a tutor. Thus, his task becomes less uniform, less hierarchical.

The e-learning revolution is not limited to the overseeing of student teams by those responsible for training. From an academic point of view, advantages seem noticeable. Some teachers considerably invest themselves in the development of new teaching methods, thanks sometimes to on-line university resource centres. Among these advantages, can be noticed better lesson preparation with e-learning favouring the use of a creative dimension often neglected by teachers. Lastly, some other competitive advantages are the infinite possibility of duplicating teaching modules, the opportunity to update contents regularly and to be able to evaluate students personally and so adapt to their learning rhythm.

From a vertical logic to a flexible logic...

Flexibility appears as the second main force of e-learning. It obviously offers less constraints in space and time. Besides which it also represents a low cost for a wide public: the initial training public can be added to the adult education public and finally to the public which could not normally access university sites.

Consequently, it is a wider public, but each person can follow his/her own *individual way of learning* thanks to the flexibility of contents and their access mode. The range is diversified since e-learning can be considered as the main access to teaching for the student who cannot visit the web site where the lesson is featured. Even more innovative: if one of the specialized fields, which is indispensable to a degree course, is not offered by the student's institution, he/her is able to access this teaching on-line from a partner institution. In addition, e-learning can simply represent a necessary shift towards punctual access to courses, not followed in full but used to add elements to existing lessons etc.

23. Durable constraints

These prospects are faced with several constraints that influence and will continue to influence e-learning's development and implantation in higher education institutions.

The first requirement, expressed both by teachers and students, deals with teamwork including that between students and also between the group and the teacher. This request for group work is due to the fear that teaching will become reduced to a student and a screen. In fact, among the main criticisms of e-learning, this preoccupation is one of the first raised. It is judged important by 41,7 % of the sample concerning students / teacher links and by 30,9 % concerning teamwork.

In the same way, one of the anxieties concerns the risk of discrepancy between this form of knowledge acquisition and the necessity of concrete situation based learning (30,8 %). Once again, we find here the risk of isolation. Nevertheless, effective e-learning practitioners praise its technical capacities which on the contrary permit users to be "in" on the real world and to bridge progressively the gulf between the teaching world and the professional spheres.

It should be underlined that the anticipated criticism concerning the superficial nature of e-learning is ranked among the least common criticisms. On this point, despite the strong position of some resistant respondents, comments on open questions show that this point of view is true for all types of teaching. The evaluations already completed show that what exists is not a problem of method, but of content. In substance, a good lesson stays good independent of the technique of knowledge transmission. The only rational explanation for differences would be teacher performance and/or pedagogical relevance. Some consider that the fears expressed by certain teachers can be seen rather as a refusal to rethink their methods or even as a sign of intellectual laziness.

Finally, the third constraint of e-learning is the wide public, potentially seduced by the use of e-learning, which inevitably produces a disparity of knowledge levels and students' aptitudes, far removed from the traditional "format" of classical teaching. Paradoxically, this criticism is less strong amongst those applying for adult education which by definition groups together diverse publics.

The weaknesses of e-learning should not diminish its strengths. In other words, the principal reproaches of e-learning cannot detract from the development opportunity the tool provides but they indicate the reorganization necessary: the use of new communication technology in teaching suggests deeper pedagogical evolutions.

The first barrier not being of a technological nature, the use of e-learning deals, first and foremost, with the implication of teaching staff, which determines the contents on offer.

24. Intellectual property : the two unknowns

The increasing use of new communication technology has rapidly raised the problem of intellectual property and the rights attached. Today, debates still persist, for example, in such sectors as the press, on-line editions or in the battles over the control of audio and video formats. All these testify to the difficulty of resolving this problem.

Naturally, those supplying e-learning content have to face the same problems and the same risk of unauthorized duplication or adaptation of their intellectual work. From this point of view, they cannot count on any specific treatment and will have to wait for the effective realization of an international legislation adapted not only for the application and sanction of this right but also for a method of remuneration.

On the other hand, the teaching world is confronted by a second unknown concerning intellectual property rights. If it is perfectly conceivable to protect specific learning techniques born from e-learning developments, it is the definition of "protectable content" which risks being a problem, especially in the initial training context. Here is a simple illustration: with the teaching of the fundamentals of mathematics, economy or law, how can the teacher's added value as author of the program be determined in relation to basic elements which can be considered as belonging, in a sense, to "the public domain of knowledge?" In other words, up to which point can intellectual property rights protect an author, whose work will become, by definition, shared, amended etc?

Within the context of traditional teaching methods some "paternity" conflicts are already shaking the academic world. Teachers, trainers, editors and new arrivals on the e-learning market have an absolute need to determine a *modus vivendi*, otherwise, its potential risks remaining virtual for a long time to come.

3. E-learning in Europe : CONTENTS ANALYSIS

31. The position of institutions

We cannot discern a model strategy towards e-learning. We observe rather a range of initiatives which refer back to the pre-established classifications at the beginning of this document, from “passive institutions” to those with an “integrated e-learning strategy”.

More concretely, the least accomplished practices are founded on the adaptation of classical courses to an on-line reading. Once again we naturally find this method most in “passive institutions,” but also in “implicated institutions”, having chosen the “extensive e-learning strategy.”

In the first case, the initiative is almost accidental (an isolated initiative from a teacher) and its development is still limited by the necessary means. The on-line access will often be restricted to a simple information tool about the organization of teaching, in order to permit students to discover a new knowledge area or to turn towards it.

In contrast, in the second case, there exists a will to provide an e-learning capability for all teachings. This results in a means development, preventing new communication technology to be imagined as anything other than a complementary or "play" tool. According to the situation, the on-line versions will be more or less enriched in relation to paper versions and self-learning techniques will be more or less evolved.

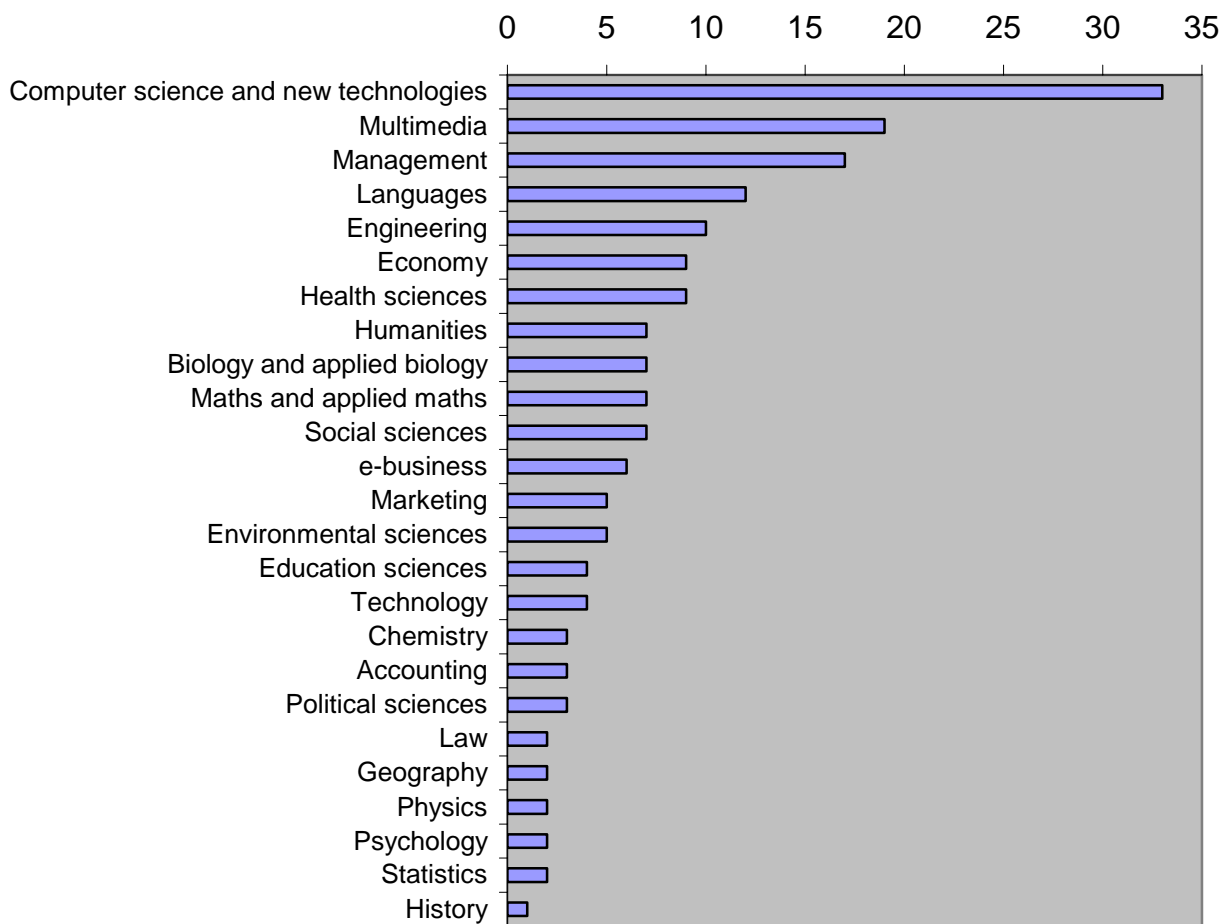
On the other side of the sample, we find institutions with an “intensive e-learning strategy” and, obviously those with “integrated e-learning”. Here, the means are either concentrated on some specific teaching areas or they have become the institution's core occupation. In both cases teaching is based on virtual classrooms gathered around a guardian (for the teaching program in full 18,3 %, for a part, 29,2 %), with e-learning programs perhaps leading towards obtaining a classical certificate (18,3 %). As many of these initiatives still possess a quite experimental side, some institutions have chosen to synchronize these virtual classrooms with real classrooms in order to measure precisely if the on-line teaching on offer effectively matches the waiting public. In this way, they are able to refine progressively the product. Once validated, courses and lectures can become accessible following three modes: in class, via a screen in real time, or via a screen on request.

This survey does not aim to study scrupulously the technological means established by institutions, which have recourse to e-learning. However, it must be underlined that all the possibilities are exploited in the institutions that make up Group 3: all interactive applications, electronic simulators, technological multi-platforms, virtual resources centers. In other words, a number of developments, that confirm the main role of educational applications for the multimedia industry.

The accent is willingly put on the necessary mastering of the information flow available for each person in a training situation. Students current difficulty is not to access information or acquire knowledge in one or other field, but rather to find themselves in a abundant knowledge environment, which can sometimes not be useful nor necessarily relevant. Thus, e-learning's added value would lie in its capacity to permit a selection and an organization of this information. All in all, e-learning would constitute the best-adapted answer to the new order brought about by the information revolution.

32. Application Fields

Times the disciplines are mentioned



From our sample, there clearly appears a variety of areas where e-learning is implicated in teaching. We can succinctly classify them in three fields:

- *Natural fields* whose existence is directly linked to the expansion of new communication technology and for whom e-learning becomes indispensable:
 - Computing
 - Multimedia
 - E-business

- *Applied fields* whose teaching via e-learning appears common or practiced by at least five institutions or more:
 - Management⁴
 - Languages
 - Engineering
 - Economy
 - Health
 - Arts and Literature
 - Biology and Industrial Biology
 - Mathematics and Industrial Mathematics
 - Social Sciences
 - Marketing
 - Environmental Sciences

- *Experimental fields* which integrate gradually e-learning as between three and five institutions refer to it:
 - Educational Sciences
 - Technology
 - Chemistry
 - Accountancy
 - Political Science

- We could almost evoke a fourth field, one of atypical subjects because they are rarely evoked ; nevertheless, they should not be prejudged on their aptitude to gradually become integrated into the categories above. This concerns:
 - Law
 - Geography
 - Physics
 - Psychology
 - Statistics
 - History

⁴ In its different components such as strategy, business creation, business simulation, specialized management (catering, hotel management).

4. E-Learning in Europe: PROSPECTS

A trend in favor of e-learning's introduction as stand-alone teaching is taking place. However, the pioneers who have entirely invested themselves in the pedagogical and technical possibilities are still rare. Nevertheless, experimentation is common enough and the topic current enough to encourage the reaction of the entire body of respondents who accepted to participate in this survey on the future of e-learning.

41. Development axes

If it is definitely too early to take into account the limits of the technological innovation in education techniques, we can however foresee, without much risk, that e-learning will have an important part to play in traditional education. Some commentators feel it could count for up to 50% of educational programs proposed over the next ten years. Those who are more reluctant point out that e-learning is just one more pedagogical tool to use judiciously, while supporters celebrate the advent of resolutely new pedagogical prospects. Specifically adapted to this tool, they will have an important role in the conception of tomorrow's education.

Therefore, the *first development axis* is *pedagogical*. It concerns a renewed pedagogy which will have to take into account simultaneously both educational and technological aspects: the definition of the pedagogical and methodological tools, the development of pedagogical techniques linked to distance education, evaluation, the resolution of problems of isolation, the reflection on interactivity, the personal advice and follow-through, and the evolution of the schools' administrative organization.

The goal is to be able to erase technical barriers so that lecturers may dedicate themselves to the achievement of adapted and high level contents, providing an answer to an eternal question: will the contents' quality follow the increase in quantity?

This "acquisition" of new technologies by those dispensing knowledge should logically lead to the creation of new specialized training occupations.

The *second axis* concerns the *technological dimension*. The quality of the equipment cannot be overlooked (hardware and software) as well as the overall conception of the appropriate information systems (by the Internet and Intranet) to allow a better flow of data. This implies the introduction in the educational world of a highly qualified technical staff who will have to acquire a real legitimacy and no longer simply have at best a vague technical capacity, at worst reputations as “botchers.” Finally, the most advanced schools have great hopes concerning the progress towards human behavior that artificial intelligence will soon make.

Finally, the *last axis* is the *material means* to be put in place. The necessity of building partnerships arises even if in fact it is still at present the exception. Two resource providers are mentioned in priority: the European Union and private companies. As far as output is concerned, there are two contrasting fundamental principles: the “open source”, in other words free access to what is offered, backed up by state institutions, and that of the “commercialization” of education.

42. Possible outcomes

Even the representatives of the "reluctant schools " agree that today's children (their audience, tomorrow's clients) grow up with a computer from the age of 12 months. Whatever the education cycle, they no longer enter schools with only basic technical knowledge but rather with an entire "technocultural" experience, which can be compared to reading and writing. It therefore falls to the educational world to rely on this experience in order to enhance its learning value, especially by understanding how to sort data and select information. This implies that teachers have to be trained in this approach and that this work needs to be started without waiting to witness the impact, the dangers and the ethics of using new communication technology.

Another general component apparently favorable to the development of e-learning is the linear structure of courses. We can learn at any age. This may still be far from the reality of general education offered to the largest public. It is already more than a reality in the field of adult education, coming from the initiative of individuals or of firms. The flexibility of e-learning represents a viable solution as an alternative educational method.

Yet, in addition to these broad considerations, two strategies can be identified which probably point to the main rupture in the evolution of this issue.

-An "academic strategy", based on the commitment of traditional schools to the future elaboration of an "Educational Europe" established on the principle of "open source." In a nutshell, a globalization of knowledge for the largest number and with respect for all cultures.

-A "commercial strategy", based on development cost analysis and on investments needed for these new methods, which implies a strong link to companies. If the e-learning market is not yet mature, it ultimately falls to its protagonists to attract investors by developing persuasive tools (specialized courses, tailoring for business executives etc). Eventually, the globalization of company needs could result in a standardized education offer by firms as academic suppliers. A nightmare for some, an El Dorado for others.

The future of e-learning is full of promise. It induces a reflection on education, culture and modes of knowledge transmission. Many traditional preoccupations resurface when rising to the challenge of new communication technology. To sum up, e-learning enables us to access more easily and "without borders," the sharing of knowledge. It fulfils the dreams and goals of UNESCO! By a curious paradox, e-learning also transforms education into a broad international trade of services, open to worldwide competition. The question which remains unanswered is therefore what will be the nature of the balance between public education services and knowledge commercialization?

Annex 1
LIST OF THE UNIVERSITIES WHICH HAVE ANSWERED TO THIS SURVEY

AUSTRIA

Vienna University of technology

BELGIUM

Case interactive NV

Ghent university

Hogeschool voor Wetenschap en Kunst

IULM

KaHo Sint-Lieven

Katholieke Hogeschool Kempen

KULeuven

Language centre, Ghent University

Talencentrum Universiteit Gent

UBI

Université libre de Bruxelles

University of Namur

DENMARK

Copenhagen business school

Engineering college of Aarhus

Mikroelektronik centret-dtu

SIMI (Scandinavian International
Management Institute)

ESTONIA

Tallinn pedagogical university

University of Tartu

FINLAND

Espoo - Vantaa Institute of Technology
Haaga Institute Polytechnic
Tampere Polytechnic
University of Helsinki

FRANCE

Ecole des mines de Paris
Ecole nationale de la Statistique et de
l'Analyse de l'Information (ENSAI)
Ecole nationale des ponts et chaussées
Ecole sup de commerce de Lille
ENSCP
ENSIETA
ESAP
ESC Rouen
ESCEM
ESCP-EAP
ESIGELEC
INSA de Lyon
INSEAD Online
INT
Ipag business school
IUFM de Bretagne
Toulouse business school
Université Bordeaux 2
Université de Bourgogne
Université de haute Alsace
Université de Limoges
Université de Rennes I (Medical school)
Université des Antilles et de La Guyane
Université du Maine, Le Mans

Université Jean Monnet St-Etienne
Université Jean Moulin Lyon III
Université Toulouse I
Université du Maine
University of technology of Compiègne
UTC

GERMANY

Akademie fuer neue medien
Fachhochschule Frankfurt am Main
Fernuniversitaet Hagen
FH - Frankfurt
Technische universitaet Darmstadt
University Bochum
University of applied sciences, Frankfurt /
Main
University of Koln

GREECE

Aristotle University of Thessaloniki
Exodus
Tei Kavalas

HUNGARY

Budapest university of technology and
economics
University of Debrecen

IRELAND

Institute of technology, Sligo
Limerick institute of technology
University college Dublin
University of Limerick

ITALY

CILTA department from Bologna university
Polytechnic of Turin
SDA Bocconi
Universita di Ancona
Universita di Bologna
Universita di Padova
Universita politecnica di Torino
University of Rome

LITHUANIA

Kaunas University of medicine
Kaunas University of technology

NETHERLANDS

Delft university of technology
Hogeschool Brabant
ITC
Maastricht school of management
Rotterdam school of management
Simuworld
University of Twente

NORWAY

Agricultural university of Norway
Gjovik university college
Konsberg university college

POLAND

Maria Curie-Sklodowska University
The polish open university
University of Warmia and Mazury

PORTUGAL

University of Porto

RUSSIA

Rostov state pedagogical University
Russian state hydrometeorological
University

SLOVENIA

University of Maribor

SPAIN

Balear de Desarrollo y formacion - BDF
Centro politecnico superior / Universidad
de Zaragoza
GDT
Universidad politecnica de Madrid
Universitat Pompeu Fabra
University of the Basque Country

SWEDEN

Lund University
Malmö University
Södertöma Högskola (university college)

TURKEY

Anadolu University

UNITED KINGDOM

Buckinghamshire chilterns university college,
business school

Institute of Business Administration and
Management

Liverpool John Moores university

Open university

University of Bradford, school of
management

University of Leicester

University of Salford, school of
management

University of Warwick

Annex 2
THE QUESTIONNAIRE

DEFINITION

1-7. For you, the word "e-learning" means...

1 : Yes, 2 : No, 3 : Sometimes

1 2 3

Teaching via on-line courses

Distance teaching, whatever the vehicle for this may be

All forms of teaching which rely on new technologies

Teaching which more or less relies on the Internet

Teaching which brings together students who are not on the same sites

A coherent package of additional on-line courses (Internet)

A coherent package of additional on-line courses (Intranet)

8. Other:

USE

9-14. In your university, e-learning:

1 : Yes, 2 : No, 3 : To a degree

1 2 3

Still have a very secondary role

Is being fully developed... even if its role is still limited

Is challenging traditional teaching

Only applies to certain fields

Is important in certain specific programmes of study

Today has an important role

15. How many hours _____

16. If other:

17. The number of students _____

18. Favourite areas

PRODUCTION

19-25. The e-learning "courses" you are using...

1 : Yes, 2 : No, 3 : In part

1 2 3

Are the result of a systematic policy of creating new teaching methods

Are all produced using only internal resources

Are the fruit of individual initiatives resources

Are borrowed from other institutions

Are produced with the support of specialist private companies

Come from a "virtual university" or education educational "market place"

Are produced in partnership with other universities

26. Other:

ADVANTAGES

27-33. E-learning presents a number of advantages

1 : Major, 2 : Important, 3 : Moderate, 4 : Minor, 5 : None

1 2 3 4 5

Greater efficiency in teaching

Saving on premises and resources professor ratio

A way of removing "the time and time-table" constraint

A way of providing courses which place more onus on learners

A way to reach "audiences" difficult to access

A way to reach a greater number of students

34. Other:

DISADVANTAGES

35-41. E-learning presents a number of disadvantages

1 : Major, 2 : important, 3 : Moderate, 4 : Minor, 5 : None

1 2 3 4 5

Lack of points of references and contacts with professors

Absence of team-work and collaboration between students

"Fragmentation" of work and loss of consistency in learning

Inadequency of monitoring

Secondary importance of practical situations and real-life applications

Superficiality of teaching

Very disparate student standards and levels of commitment

42. Other:

REASON FOR USE

43-49. Your University has embarked on/will be embarking on e-learning in order to...

1 : Yes, 2 : In part, 3 : On a small scale, 4 : No

1 2 3 4

Limit the production costs of teaching

Offer a competitive deal in continuing education

Attract a greater number of students

Diversify the range of educational products on offer

Gain competitive advantages

Set and standardise the content of teaching

Attract an international audience

50. Other:

THE EXPERIENCE OF FACULTY MEMBERS

51-56. In your view, faculty members from your university / programme of studies

1 : Yes, 2 : In part, 3 : To a small extent, 4 : No

1 2 3 4

Are very motivated towards putting effort into e-learning

Sometimes have basic reservations on e-learning

Prefer traditional ways of teaching and research

Approach e-learning as a team-operation

reputation attractive

Categorise e-learning more as research rather than teaching

57. Other:

THE EXPERIENCE OF STUDENTS

58-64. In your view, students from your university/programme of studies

1 : Yes, 2 : In Part, 3 : To a small Extent, 4 : No

1 2 3 4

Prefer "traditional" teaching

Are particularly appreciative of e-learning's flexibility

Only see e-learning as an additional tool

Have a real sense of being innovative with e-learning

Out more effort into it than with traditional teaching

Miss having the direct relationship with the professor

Miss the team-work

65. Others:

CHARACTERISTICS

66-71. the e-learning modules you are offering

1 : Yes, 2 : In Part, 3 : No

1 2 3

**duplicate notes" from courses adapted for on-line and sequential learning
place a large emphasis on student assessment
favour self-assessment
are designed in conjunction with a very extensive tutorial system
are based on virtual classes with consolidation
may lead to a degree award**

72. what are the main features of the e-learning modules you are offering?

73. are your e-learning modules evaluated ? Yes no ... If yes... How ? ... If no ... Why not ? _____

74. what in your view, are the strong points of your e-learning ?

ISSUES

75-82. For you, the issues concerning e-learning today are ...

1 : Yes, 2 : In Part, 3 : To a small Extent, 4 : No

1 2 3 4

**first and foremost economic
Educational ... about a new method of learning
cultural ... on whether the USA is to dominate or not
mainly to do with continuing education ... where e-learning is to have a major role
international ... to attract remote audiences
above all in primary and secondary education
social ... to enable disadvantaged sectors to engage in learning
to do with being competitive ... to remain attractive to students**

83. Others

FUTURE PROSPECTS

84. What are your views on the future of e-learning ?

CONDITION

85. What are the conditions for success in teaching via e-learning?

YOUR DETAILS

86. Name _____

87. Position/Title _____

88. University _____

89. Country _____

90. Programme _____

91. Your university is
1. state 2. private

92. Number of students _____

93. Email _____

94. Telephone _____

95. Fax _____

96. Web site If possible _____

Annexes 3 TABLES

DEFINITION

1-7. For you, the word "e-learning" means...

	Yes	No	Sometimes	No response
Teaching via on-line courses	67,5%	6,7%	20%	5,8%
Distance teaching, whatever the vehicle for this may be	25,8%	41,7%	19,2%	13,3%
All forms of teaching which rely on new technologies	45%	19,2%	25,8%	10%
Teaching which more or less relies on the Internet	61,7%	7,5%	23,3%	7,5%
Teaching which brings together students who are not on the same sites	34,2%	13,3%	40,8%	11,7%
A coherent package of additional on-line courses (Internet)	49,2%	9,1%	31,7%	10%
A coherent package of additional on-line courses (Intranet)	40,8%	8,3%	40%	10,8%

USE

9-14. In your university, e-learning:

	Yes	No	To a degree	No response
Still have a very secondary role	51,7%	23,3%	15,8%	9,2%
Is being fully developed... even if its role is still limited	40,0%	23,3%	25,8%	10,8%
Is challenging traditional teaching	34,2%	30,8%	22,5%	12,5%
Only applies to certain fields	40,0%	21,7%	27,5%	10,8%
Is important in certain specific programmes of study	46,7%	16,7%	25,8%	10,8%
Today has an important role	35,8%	30,8%	20,8%	12,5%

15. How many hours

52 valid observations (more than half unanswered)

average: around 400 hours, minimum : 0 hours; maximum : 600 hours

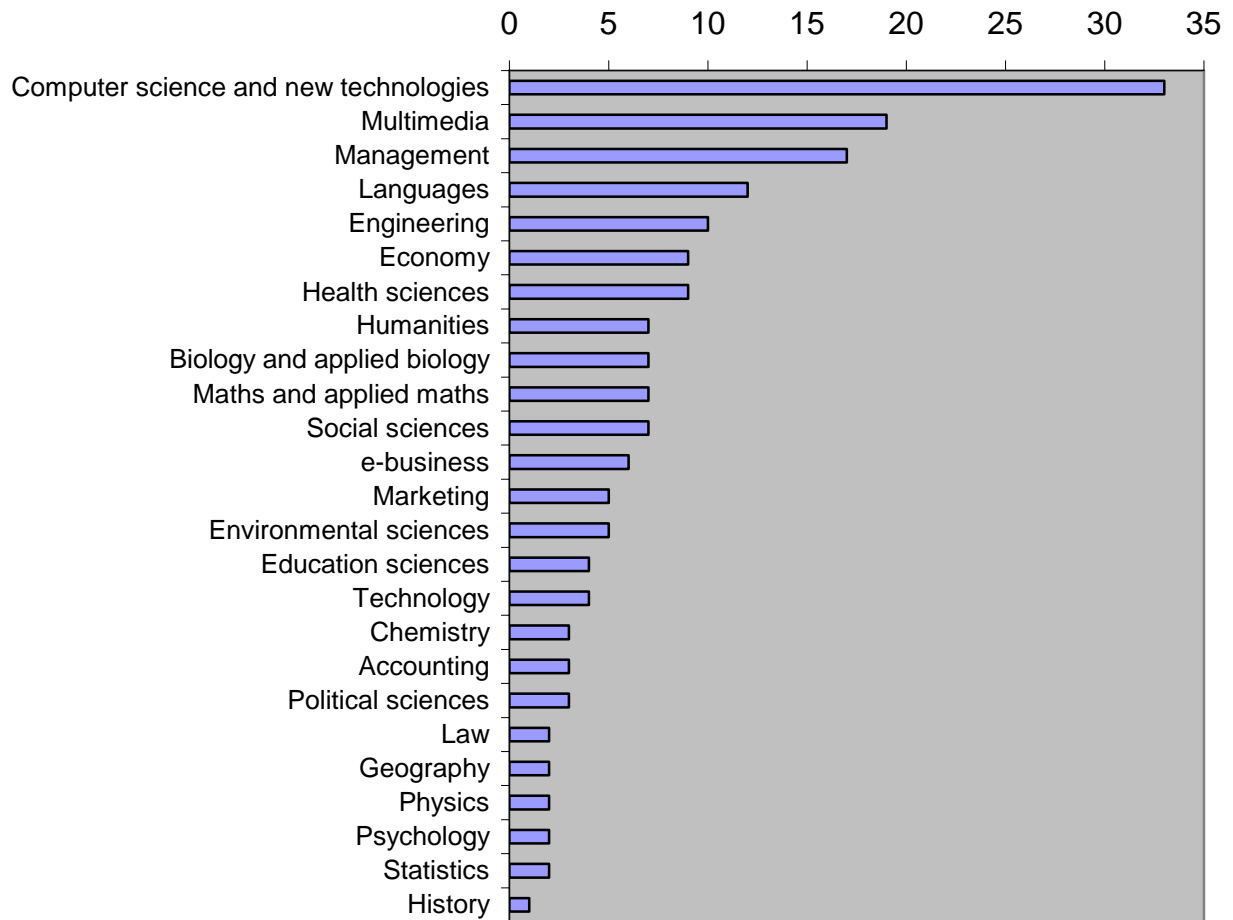
17. The number of students

69 valid observations

average : around 700 students (median: 200), minimum : 0 students ; maximum : 7500 students

18. Favourite areas

Times the disciplines are mentioned



PRODUCTION

19-25. The e-learning "courses" you are using...

	Yes	No	In part	Non response
Systematic policy	40,8%	26,7%	18,3%	14,2%
Internal resources	41,7%	26,7%	19,2%	12,5%
initiative	57,5%	15,0%	15,0%	12,5%
other institutions	5,0%	70,0%	9,2%	15,8%
private companies	5,8%	70,8%	6,7%	16,7%
virtual university	6,7%	70,0%	6,7%	16,7%
partnership	17,5%	41,7%	23,3%	17,5%

ADVANTAGES

27-33. E-learning presents a number of advantages

	Major	Important	Moderate	Minor	None	No response
Greater efficiency in teaching	18,3%	39,2%	23,3%	10,0%	3,3	5,8%
Saving on premises and resources	10,8%	30,0%	25,8%	11,7%	15,0%	6,7%
professor ratio	5,0%	29,2%	23,3%	18,3%	17,5%	6,7%
A way of removing "the time and time-table" constraint	38,3%	35,0%	13,3%	8,3%	1,7%	3,3%
A way of providing courses which place more onus on learners	19,2%	45,0%	20,0%	6,7%	2,5%	6,7%
A way to reach "audiences" difficult to access	26,7%	42,5%	10,8%	6,7%	7,5%	5,8%
A way to reach "audiences" difficult to access	21,7%	35,0%	19,2%	10,0%	9,2%	5,0%

DISADVANTAGES

35-41. E-learning presents a number of disadvantages

	Major	important	Moderate	Minor	None	No response
Lack of points of references and contacts with professors	17,5%	24,2%	25,0%	14,2%	11,7%	7,5%
Absence of team-work and collaboration between students	9,2%	21,7%	18,3%	14,2%	28,3%	8,3%
"Fragmentation" of work and loss of consistency in learning	6,7%	18,3%	18,3%	29,2%	19,2%	8,3%
Inadequacy of monitoring	3,3%	14,2%	29,2%	25,8%	15,8%	11,7%
Secondary importance of practical situations and real-life applications	5,8%	25,0%	24,2%	16,7%	16,7%	11,7%
Superficiality of teaching	4,2%	14,2%	24,2%	26,7%	20,0%	10,8%
Very disparate student standards and levels of commitment	10,8%	18,3%	31,7%	20,8%	8,3%	10,0%

REASON FOR USE

43-49. Your University has embarked on/will be embarking on e-learning in order to...

	Yes	In part	On a small scale	No	Non réponse
Limit the production coasts of teaching	7,5%	16,7%	20,8%	46,7%	8,3%
Offer a competitive deal in continuing education	51,7%	25,0%	11,7%	5,8%	5,8%
Attract a greater number if students	28,3%	35,8%	17,5%	10,0%	8,3%
Diversify the range of educational products on offer	44,2%	30,8%	7,5%	6,7%	10,8%
Gain competitive advantages	47,5%	28,3%	10,0%	6,7%	7,5%
Set and standardise the content of teaching	20,0%	32,5%	19,2%	20,8%	7,5%
Attract an international audience	37,5%	29,2%	15,8%	10,8%	6,7%

THE EXPERIENCE OF FACULTY MEMBERS

51-56. In your view, faculty members from your university / programme of studies

	Yes	In part	To a small extent	No	No response
Are very motivated towards putting effort into e-learning	14,2%	50,8%	25,0%	6,7%	3,3%
Sometimes have basic reservations on e-learning	29,2%	43,3%	18,3%	4,2%	5,0%
Prefer traditional ways of teaching and research	30,8%	46,7%	13,3%	5,0%	4,2%
Approach e-learning as a team-operation	26,7%	30,8%	21,7%	14,2%	6,7%
reputation attractive	18,3%	42,5%	21,7%	13,3%	4,2%
Categorise e-learning more as research rather than teaching	6,7%	21,7%	24,2%	41,7%	5,8%

THE EXPERIENCE OF STUDENTS

58-64. In your view, students from your university/programme of studies

	Yes	In Part	To a small Extent	No	No response
Prefer "traditional" teaching	18,3%	48,3%	15,0%	11,7%	6,7%
Are particularly appreciative of e-learning's flexibility	38,3%	39,2%	15,0%	0,8%	6,7%
Only see e-learning as an additional tool	39,2%	38,3%	11,7%	5,0%	5,8%
Have a real sense of being innovative with e-learning	35,8%	37,5%	15,8%	4,2%	6,7%
Out more effort into it than with traditional teaching	25,0%	26,7%	20,0%	18,3%	10,0%
Miss having the direct relationship with the professor	17,5%	28,3%	29,2%	15,0%	10,0%
Miss the team-work	15,8%	27,5%	18,3%	28,3%	10,0%

CHARACTERISTICS

66-71. the e-learning modules you are offering

	Yes	In Part	No	No response
duplicated notes" from courses adapted for on-line and sequential learning	20,8%	38,3%	28,3%	12,5%
place a large emphasis on student assessment	24,2%	40,8%	21,7%	13,3%
favour self-assessment	37,5%	36,7%	13,3%	12,5%
are designed in conjunction with a very extensive tutorial system	33,3%	26,7%	26,7%	13,3%
are based on virtual classes with consolidation	18,3%	29,2%	36,7%	15,8%
may lead to a degree award	18,3%	25,0%	45,0%	11,7%

ISSUES

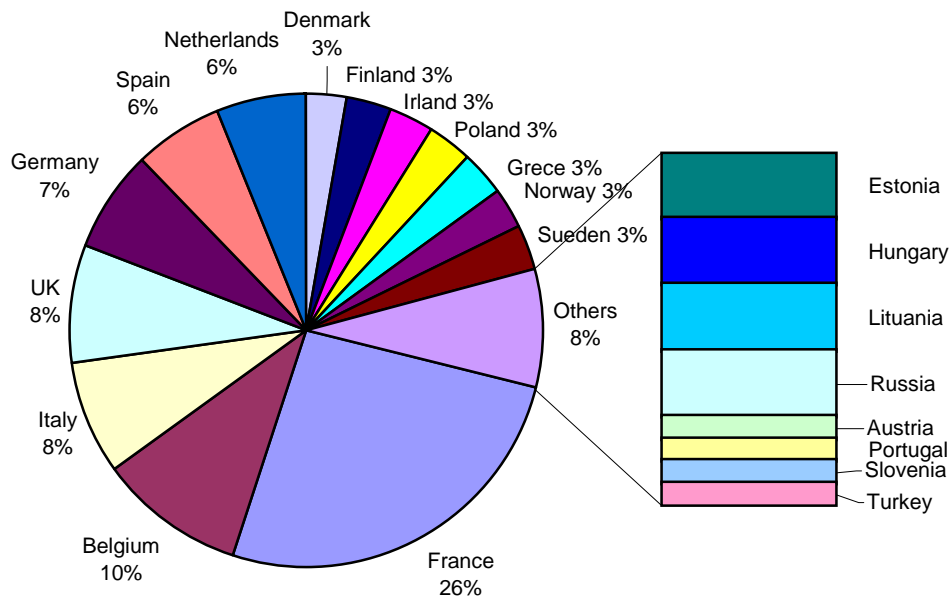
75-82. For you, the issues concerning e-learning today are ...

	Yes	In Part	To a small Extent	No	No response
first and foremost economic	20,0%	36,7%	19,2%	20,0%	4,2%
Educational ... about a new method of learning	70,8%	17,5%	6,7%	0,8%	4,2%
cultural ... on whether the USA is to dominate or not I	11,7%	25,0%	21,7%	35,8%	5,8%
mainly to do with continuing education ... where e-learning is to have a major role	48,3%	35,0%	8,3%	4,2%	4,2%
international ... to attract remote audiences	31,7%	40,8%	15,0%	7,5%	5,0%
above all in primary and secondary education	4,2%	21,7%	17,5%	49,2%	7,5%
social ... to enable disadvantaged sectors to engage in learning	27,5%	31,7%	19,2%	16,7%	5,0%
to do with being competitive ... to remain attractive to students	45,0%	41,7%	6,7%	0,8%	5,8%

YOUR DETAILS

89. Country

Countries represented



91. Your university is

state	75%
private	20,8%
Non réponse	4,2%

92. Number of students

