

## **ELeaning and the Lisbon strategy: an analysis of policy streams and policy-making**

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### **Abstract**

Under the Lisbon strategy, education and training form an essential element of the social pillar which aims to modernise the European social model through investment in human resources and combating social exclusion. Up to 2004, elearning was promoted as a key element in achieving the strategy especially through the Elearning Action Plan (2004-2006). This paper will analyse the process through which elearning emerged as a policy measure in implementing the Lisbon strategy. Using Kingdon's policy streams metaphor (Kingdon, 1995), this paper will outline the policy and problem streams which coalesced in the late 1980s, opening a 'policy window', and which pushed distance learning onto the EU political agenda in the early 1990s. These included the accretion of 'soft law' around the area of vocational education and training since the Treaty of Rome in 1957; the challenges offered by the emerging new information technologies, declining industries and changing demands for skills; the adoption of distance learning systems at national level to redress disadvantage, and to provide flexible, high-quality and cost-effective access to higher education to adults who were unable to attend on-campus; and the role of the Commission, policy entrepreneurs and networks in promoting distance education as a solution to the major social and economic problems facing Europe. The Treaty of Maastricht committed the EU to supporting education and training in the community, and in particular, to 'encouraging the development of distance education' (Art 126 changed to Art 149 in Amsterdam, Nice and Lisbon Treaties). A series of implementation programmes in the 1990s, including Socrates, Tempus and Phare, funded distance learning initiatives in the EU and accession countries. With the development of the Internet and web technologies, elearning came to replace distance education in the EU discourse. The paper will conclude with some observations on the current role of elearning policy within the Lisbon strategy.

### **Introduction**

The Lisbon Strategy launched in 2000, set out to make Europe the most competitive and dynamic knowledge based economy in the world with improved employment and social cohesion by 2010. The role of education and training, and the potential of elearning to deliver on the need for lifelong learning were key pillars in delivering on this objective. According to Van der Pas 'at Lisbon the Heads of State and Government brought education and training policy out of the background where they had been hiding for thirty years, and presented them with the challenges they have to face. And Member States and the Commission have responded properly to those challenges' (van der Pas, 2002). In 2005, the now 27 Member States committed to an ambitious work programme aimed at achieving the broad objectives for reforming education and training systems by 2010 (CEC, 2007). The European Commission produces annual reports on the progress of the Member States in achieving the five benchmarks and the sixteen key progress indicators established by the various

Councils. According to the most recent report for 2007, ‘a number of EU Member States are already achieving world-best performances in specific areas, whereas others face serious challenges. It shows that there is real added value in exchanging information on best policy practice at European level and thus lays the foundation for further development of the policy exchanges and further improvement of the framework of indicators and benchmarks which underpins it’ (CEC, 2007).

Such a level of oversight of individual Member State education and training systems would have been unthinkable to the founding fathers of the European Union. While one of the ‘founding fathers’, Jean Monnet is reported to have stated that if he were starting again, he would start with education (although widely quoted, it has not proved possible to find the source of this statement), nevertheless, the Treaty of Rome in 1957, saw no role for education in what was seen as a purely economic and technocratic arrangement. However, in the following half century, there emerged a gradual accretion of soft law arising from a series of action programmes and initiatives which led to the first formal legislative basis for EU action in education and training, with the insertion of Articles 126 and 127 Maastricht Treaty in 1992 (subsequently renumbered 149 and 150 in the later Amsterdam, Nice and Lisbon Treaties). At the same time, the principle of subsidiarity was also enshrined in the treaties to protect Member State autonomy in these areas.

Perhaps because of its uncertain and relatively minor status in EU policy and spending, education and training received little attention from EU researchers up to the 1990s. However, following the Treaty of Maastricht, the level of research output in terms of PhD theses, articles and books has grown considerably (see for example Barnard, 1995; Brine, 1995; Corbett, 2005; Corbett, 2002; De Witte, 1993; Ertl, 2006; Field, 1998; Gellert, 1993; Hackl, 2001; Hodgson, 2002; MacKeogh, 2005; McCann, 2001; Neave, 1994; Nihoul, 1999; Pepin, 2006; Salajan, 2007b; Tait, 1995). In this paper it is not possible to do full justice to the wide range of areas in which EU education and training policy has penetrated. Instead this paper will focus on one area, that of elearning, a term which emerged in the late 1990s, with the widespread adoption of the internet, and which replaced the earlier terms distance education or open distance learning in EU policy discourse. In particular, since distance education was regarded as of sufficient importance in EU policy to merit a specific reference in Article 126 of the Maastricht Treaty (and retained in subsequent Treaties) it is appropriate to investigate how and why this commitment was enshrined in the Treaty, and to what extent this commitment influenced subsequent EU actions.

The data in this paper are drawn from a case study of EU distance education policy, which utilised a mix of qualitative and quantitative methods, including analysis of EU documentation and archives from 1957 to 2008; semi-structured interviews carried out with twenty six key stakeholders in 2003-4, including members of the EU Commission, and members of European distance education networks; and the author’s experience as a contributor to EU policy making, and participant in EU funded projects over a period of twenty years. The paper will first set out the analytical framework for analysing the EU’s policy in distance education and elearning, adopting Kingdon’s policy streams framework (Kingdon, 1995), before discussing the way in which the policy window for distance education opened in 1992. The paper will outline the initiatives in the 1990s which sought to embed open distance learning (and, after 2000, elearning) in Member State systems. The changing

circumstances which led to the eclipse of elearning in recent EU discourse will be discussed.

### **Analysing EU Policy on Distance Education**

Richardson (1996b) proposes a relatively straightforward four-stage model of the policy-making process: at the *agenda setting stage*, various ideas and solutions are promoted by a wide range of interest groups in response to perceived problems or interests; at times of crisis, or when a problem comes the surface, ideas are selected and *formulated into policies* aimed at responding to the problem; following a process of deliberation and consideration of alternatives, a *policy decision* is made, which is then *implemented*. Much attention has been paid to the crucial agenda setting stage which surrounds and determines the policy-making process (Brine, 2000; Corbett, 2000; From, 2002; Kingdon, 1995; Nihoul, 1999; Verdun, 2000; Zito, 2001). Corbett points out that:

public policy decisions are determined not only by votes, or by initiatives and/or vetoes by heads of state or government, but also by the fact that some subjects and proposals emerge in the first place and others are never seriously considered (Corbett, 2000: 135).

In his influential work on policy analysis, Kingdon (1995) uses evolutionary ideas to explain the dynamic process of policy-making, suggesting that at the crucial agenda setting stage, many ideas or solutions float around in ‘the policy primeval soup’ until such time as those which survive are coupled with a problem and at the same time a ‘policy window’ is opened up by a crisis, political events, or the determination of a powerful policy entrepreneur (John, 2003; Kingdon, 1995).

While Kingdon worked in the area of health and transportation, his analysis of the policy process has been widely used as a framing device to analyse agenda setting in public policy in a range of areas (Corbett, 2000; Nihoul, 1999; Richardson, 1996b). Kingdon uses the metaphor of streams to identify three processes at work in agenda setting: the problem stream, the policy stream, and the politics stream. In the *problem stream*, issues are recognised as significant problems (e.g. skills gaps) when groups or individuals in and around government (or EU) institutions can or want to do something about them; interest or lobby groups can also work to stimulate interest in problems at the policy level. Policies emerge into the *policy stream* from ideas or solutions which may be pushed by experts or by governmental agendas and may survive or disappear at this level depending on which advice is regarded as ‘good’ advice at a particular time. Both the problem stream and the policy stream operate in the context of the *politics stream* which comprises the wider political environment including elections, government processes, organised political forces, consensus building and public opinion. The concept of the *policy window* is regarded as the key for analysing the process of how problems, policies and politics come together at critical times to force an issue onto the EU or governmental decision agenda. The policy window may come about through random events, or what Kingdon (1995) terms a focusing event, such as an external crisis, or a skilled policy entrepreneur may emerge with a particular agenda to implement. Kingdon (1995) also points out that the proposals which survive must meet several criteria, including their technical feasibility, fit with dominant values, current national mood, budgetary workability, and political support or opposition.

While there have been criticisms of Kingdon's approach for its lack of theoretical rigour (see for example Sabatier, 1997), nevertheless, Richardson comments that Kingdon's framework 'seems to fit the EU very well' although he counsels that EU policy-making is more 'messy' and complicated (Richardson, 1996b: 17). Table 1 below summarises the key aspects of the framework which are applied to the analysis in this paper:

**Table 1 The EU Policy-Making Process: A Framework For Analysis**

Policy Stage	Actors	Processes
Stage 1: Agenda Setting	Council Presidencies European Parliament Commission Officials National Governments EU Committees Epistemic Communities Policy entrepreneurs Lobby/Interest groups Networks Advocacy coalitions	<p><i>Problem stream;</i> issues are recognised as significant problems (e.g. skills gaps); interest groups work to trigger interest in solutions (e.g. ODL, elearning)</p> <p><i>Politics stream:</i> the wider political environment of elections, government, public opinion; both the <i>problem stream</i> and <i>policy stream</i> operate in the context of the politics stream</p> <p><i>Policy stream;</i> contains advice which is regarded as good advice at any given time; changes according to the problem stream and external events</p> <p><i>Policy windows</i> – an opening for new views to enter either the problem, policy, or politics stream; triggered by crisis: new international agreements; budget negotiations, priority setting exercises</p>
Stage 2: Policy formulation	EU Commission EU Committees Expert Groups Policy entrepreneurs Policy networks	Lobbying; research; discussion documents; expert groups; consultation meetings
Stage 3: Policy decision	European Parliament EU Council National Governments	Directives, regulations, legislation; treaties
Stage 4: Implementation	EU Commission Member states National Networks Project participants	Action programmes (e.g. Socrates, Lifelong Learning); Lisbon benchmarking processes

Source: after Kingdon (1995); Richardson (1996a) and others.

### Distance Education and the Policy Stream

The European Parliament adopted a resolution on the Open Universities in 1987, an event which is generally used as the starting point for discussing EU policy and distance education (European Parliament, 1987). However, the idea of distance education had been floating in the policy stream for many years. The 1961 Commission (CEC, 1961) proposals on vocational education accepted the need to adopt modern teaching methodologies, and the 1971 Commission Guidelines for an action plan on vocational education (CEC, 1971) referred to the potential of correspondence education. In the same year, the Council of Europe proposed the establishment of a European Inter-University Institute for the Development of Multimedia Distant Study Systems (Seabright and Nickolmann, 1992: 2). The influential 1973 Janne report had highlighted the potential of the open university model, and recommended that the Community should set up a specialised body (a European Open University) for the purpose of promoting the mass media and new technology in the context of what was then termed 'permanent education' (CEC, 1973). In 1985, the Commission found new impetus for policy-making in education and training under the Presidency of Jacques Delors; and a series of action

programmes for the first time provided funding for distance education projects (e.g. EUROTECNET, COMETT and DELTA).

COMETT (Community programme in Education and Training for Technology) was the first EU programme specifically to target education and was to make a significant contribution to the field of open and distance learning (Charters d'Azevedo, 1991: 22; Field, 1998: 46; Van den Brande, 1993a). According to Nicholas Fox (then an official in the COMETT Technical Office):

Through the projects supported, COMETT is building an infrastructure to both develop and deliver open and distance learning programmes on a European scale. This infrastructure is being fully integrated into the overall education and training structure of the Community. COMETT thus represents a major initiative in which support for Distance Education projects is provided in the wider context of a programme to improve the education and training infrastructure. It is particularly noticeable that through COMETT a number of conventional educational providers are developing a distance education capability (Fox, 1989: 42).

COMETT I<sup>1</sup> was adopted for a three year period with funding of 45MECU, starting 1 January 1987. The objectives were to encourage university enterprise cooperation in education and training for the new technologies; to bring a European dimension to university enterprise cooperation in training related to the new technologies; to promote joint university enterprise development; and to improve the supply and level of training at local, regional and national levels.

COMETT was intended to give further impetus to actions already taken with regard to introducing new technologies in schools and vocational training; to strengthen European cooperation between universities and other institutions of higher education and industry and to contribute to development of human resources in the context of Internal market, and the strengthening of social and economic cohesion, and to complement R&D programmes such as ESPRIT, RACE, BRITE, DELTA etc.(CEC, 1989).

Between 1986 and 1989 COMETT funded 1,300 projects (Van den Brande, 1993b) and by 1990, 2,000 universities, 2,500 companies, and 3,000 professional bodies had participated in the programme (Laffan, 1992). The prospect of funding under COMETT stimulated a number of initiatives among European distance teaching institutions. One of the main objectives for establishing the SATURN network was 'to bring together organisations - industrial, commercial and educational, with a view to putting proposals forward for EEC funding under the COMETT programme.' COMETT's 'midwife support' was also partially responsible for the establishment of another prominent network, EUROPACE (Prosser and Durando, 1992: 342). COMETT II was adopted by the Council of Ministers on 16<sup>th</sup> December 1988<sup>2</sup> with a mandate to promote the cost-effective production of open learning materials with a budget for 5 years of 200MECU (CEC, 1989). One of the COMETT II objectives was to 'promote continuing education in the technology sector and multimedia distance education' and achieve greater cooperation between national distance learning

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<sup>1</sup> Council Decision of 24 July 1986 adopting the programme on cooperation between universities and enterprises (COMETT) (86/365/EEC) OJ L 222/17 8 August 1986

<sup>2</sup> 89/27/EEC on COMETT – Community Programme in Education and Training for Technology OJ L13 17 January 1989.

systems in an effort to develop a European dimension. 40% of the budget was allocated to multilateral initiatives for the development of multimedia training systems. Over 3,000 hours of ODL materials were produced under COMETT II (Tait, 1995). All of the main distance learning networks, EADTU, SATURN, EUROSTEP and EUROPACE received significant funding under COMETT II. As an indication of the importance of the Comett programme in creating the conditions for adoption of ODL, it is interesting to note that Hywel Jones (a key Commission official in the 1980s and 1990s) writing in 2005 in the context of the Lisbon agenda commented that:

‘sadly, for bureaucratic reasons of rationalisation, Comett was first merged, then lost within the Leonardo programme...the powerful challenge posed to universities to generate lasting relations with industry and commerce lost its place in the European policy agenda’ (Jones, 2005: 256).

Jones concluded that the time was ripe to reinstate Comett as a means of achieving the Lisbon objectives.

In the late 1980s, the distance learning networks engaged in collaboration with European distance education institutions, higher education institutions, policy makers and industry. Following an initiative from the Irish Presidency (on the recommendation of the National Distance Education Centre, a founder member of the European Association of Distance Teaching Universities), the Commission prepared a *Memorandum on Open Distance Learning* in 1991 (CEC, 1991); in the same year, the clause committing the EU to ‘encouraging the development of distance education’ was written into Article 126 of the Draft Treaty of European Union, signed in Maastricht in February 1992 (See Table 2 which lists the provisions of Article 126 Maastricht and the amended provisions Article 149, Treaty of Lisbon).

How did distance education come to occupy this central position? Certainly no other educational methodology was referred to in the Treaty. To a certain extent, the explanation for the elevation of distance education to the forefront of EU policy lies in the coalition of three development streams: the emergence of distance education as a ‘respectable’ form of higher education in the 1970s; the role of the new information technologies in transforming society and economies; and the increasing concern within the European Union with the completion of the internal market to safeguard competitiveness, and the need to create a people’s Europe of citizens committed to the aims of the Union. From the 1970s, following the lead taken by the UK government’s support for the Open University, Member States increasingly adopted distance education as an instrument of economic development. Distance education was introduced in a number of Member States to extend access to education, particularly to adults disadvantaged by location, occupation, income, disability, or prior academic achievement, in a cost and pedagogically effective way, as well as increasing the skills and qualifications of the adult population. ‘The best providers, both public and private, wanted to offer accessible educational opportunities, based on quality materials, leading to reputable qualifications’ (Rumble, 2001: 228). This period saw the establishment in Europe, in rapid succession, of open universities, dual mode institutions and consortia of distance education. By 1990, only Greece and Luxembourg lacked some form of publicly funded distance higher education.

**Table 2 Article 126 of the Maastricht Treaty and proposed Amended Article 149 Treaty of Lisbon**

Article 126 (renumbered 149 in Amsterdam and Nice)	Article 149 Lisbon Treaty
1. The Community shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action, while fully respecting the responsibility of the Member States for the content of the teaching and the organization of education systems and their cultural and linguistic diversity.	1. The Union shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action, while fully respecting the responsibility of the Member States for the content of teaching and the organisation of education systems and their cultural and linguistic diversity
2. Community action shall be aimed at: <ul style="list-style-type: none"> <li>• developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States</li> <li>• encouraging mobility of students and teachers, inter alia by encouraging the academic recognition of diplomas and periods of study</li> <li>• promoting cooperation between educational establishments</li> <li>• developing exchanges of information and experience on issues common to the education systems of Member States</li> <li>• encouraging the development of youth exchanges and of exchanges of socio-educational instructors</li> <li>• <b>encouraging the development of distance education</b></li> </ul>	2. Union action shall be aimed at: <ul style="list-style-type: none"> <li>• developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States</li> <li>• encouraging mobility of students and teachers, inter alia by encouraging the academic recognition of diplomas and periods of study</li> <li>• promoting cooperation between educational establishments</li> <li>• developing exchanges of information and experience on issues common to the education systems of Member States</li> <li>• encouraging the development of youth exchanges and of exchanges of socio-educational instructors and encouraging the participation of young people in the democratic life in Europe</li> <li>• <b>encouraging the development of distance education</b></li> <li>• developing the European dimension in sport, by promoting fairness and openness in sporting competitions and cooperation between bodies responsible for sports, and by protecting the physical and moral integrity of sportsmen and sportswomen, especially the youngest sportsmen and sportswomen.</li> </ul>
3. The Community and the Member States shall foster cooperation with third countries and the competent international organisations in the field of education in particular the Council of Europe.	3. The Union and the Member States shall foster cooperation with third countries and the competent international organisations in the field of education and sport, in particular the Council of Europe.
4. In order to contribute to the achievement of the objectives referred to in this Article the Council acting in accordance with the procedure referred to in Article 251 [formerly 189b], after consulting the Economic and Social Committee and the Committee of the Regions, shall adopt incentive measures, excluding any harmonisation of the laws and regulations of the Member States, acting by a qualified majority on a proposal from the Commission, shall adopt recommendations	4. In order to contribute to the achievement of the objectives referred to in this Article : <ul style="list-style-type: none"> <li>• the Council acting in accordance with the ordinary legislative procedure, after consulting the Economic and Social Committee and the Committee of the Regions, shall adopt incentive measures, excluding any harmonisation of the laws and regulations of the Member States.</li> <li>• The Council, on a proposal from the Commission, shall adopt recommendations.</li> </ul>

Source: 1992 Treaty on European Union; the Treaty of Maastricht Luxembourg: OOPEC; proposed Treaty of Lisbon (Ó Broin, 2007: 114-5)

In parallel with the burgeoning national initiatives on distance education, a separate stream of developments, based on the introduction of new information technologies in schools and training, came to prominence in EU policy in the late 1970s. The extent of technological change between the 1950s and the 1980s was unprecedented. The world economy moved increasingly from the industrial society based on mass production and mechanical systems, to the Information Society based on electronic systems and flexibilisation. Technological developments created profound changes in

the nature of work, leading to massive job losses in the traditional sectors, and substantial skills shortages in the new sectors. The years after 1957 were characterised by massive leaps in technology. By 1969, the ARPANET system, the precursor of the Internet, had been developed. The first email message was sent in 1971, and in 1979, the first proprietary online service was launched (Blackhurst and Edyburn, 2000). The introduction of relatively affordable microcomputers and PCs in the 1980s, combined with the potential to link remote computers together, had at last made the possibility of using technology to both enhance educational practice and to widen access, seem feasible.

The Commission's 1971 guidelines on vocational training had referred to the use of modern teaching methodologies (correspondence courses, programmed instruction, use of computers in education and training, in the context of improving teaching methods), however, it was not until 1978 that a stream of policy-making on introducing new technologies in education and training was initiated following the European Council Meeting in Bonn. The Council and Ministers of Education agreed in 1981 that

the introduction of new information technologies (NITs) has profound implications for education systems, particularly as regards general education curricula and teacher training, the training of technicians, and the organisation and methods of education. Affirmative action in this respect should be envisaged to enable all age groups in society to face up to the social and economic challenges involved. (CEC, 1986: 73).

The Commission was called on to make recommendations on 'ways of extending education and training opportunities for adults by exploiting the potential of the new information technology' (CEC, 1986: 74). The Commission's 'Education policy for Europe' highlighted the role of NITs in education and training as a means of combating worsening employment, and competition from the USA and Japan in the technology sector (CEC, 1982: 25). In 1982, the European Parliament passed a resolution on the introduction of NITs in education, and the need for cooperation between the Member States and the Commission. The Council adopted resolutions in 1983 concerning measures relating to new information technologies in vocational training and general education (CEC, 1986: 81-84). In November 1986 the Council agreed a programme for 1987-88 focusing on four strategic areas including incorporation of new information technologies in teaching practice and school curricula (CEC, 1989: 27). By 1987, 'spectacular development' was recorded in all the Member States 'as regards the introduction of NIT into schools including equipment, training of teachers, and production of educational software' (CEC, 1987). Despite the level of Community interest and activity in the NITs in education and training, distance education remained on the margins, although national initiatives were sometimes acknowledged. However, between 1985 and 1987, arising from changes in Community policy driven by preparations for the Single Market, a series of programmes aimed at higher education was introduced which would draw national ODL providers into the European arena (including Comett as discussed above). In 1987, the European Parliamentary resolution, mentioned above, also served to open the policy window which allowed distance education to enter the EU policy stream over the next five years. The resolution was based on a report prepared by Scottish MEP Mrs Winifred Ewing (Ewing Report, 1987). Interestingly, the Report did not link proposals for distance education with the EU's policies for NITs in conventional

education systems. Instead, it is clear that the egalitarian aims and objectives of the Open Universities were the guiding principles for adopting action in distance education. The Report stressed that the primary objective of the OUs was to:

provide a second chance or a second path to higher education for adults who do not wish to enter full-time education, or who cannot do so on account of family and/or work commitments. In the process, open universities aim both at self-fulfilment of the individual and more broadly at contributing to economic prosperity and social progress (Ewing Report, 1987: 8)

It is clear that the four Open Universities in existence at that time (UK, Germany, Netherlands and Spain) had established a position of some influence at European level. The resolution highlighted the potential of OUs and distance education to serve the need for adult education and training in Europe, especially among the disadvantaged, as well as their contribution to European integration through teaching languages. Member States were urged to support OUs and other national ODL initiatives, and to tackle obstacles and barriers to participation posed by high fees and fee differentials, customs regulations on cross-border distribution of course materials, and recognition of qualifications. The Commission was called on to promote OUs through preparing reports, disseminating information, and involving OUs in programmes such as Comett, ERASMUS and DELTA. Finally, a key recommendation was a call to investigate the feasibility of establishing a European Open University.

The proposal to initiate a European Open University was not welcomed by the newly founded European Association of Distance Teaching Universities (EADTU) which mustered a successful lobby to persuade the Commission to work through existing institutions, in particular the European Open University Network established by EADTU, rather than setting up a new separate institution (Field, 1998; Tait, 1996). In 1990, the Commission produced, with the assistance of representatives of the ODL networks and institutions, a number of reports on distance learning in the European Community culminating in November 1991 with the *Memorandum on Open Distance Learning* (CEC, 1991). The *Memorandum* drew heavily on the report of the IRDAC Committee, which had identified significant skills shortages in Europe, to support its call for Community action in distance education (IRDAC, 1991). Earlier that year, the commitment to encouraging the development of distance education had already been inserted into the draft Maastricht Treaty (Corbett, 1993: 304).

Kingdon's (1995) policy streams concept is a useful analytical framework on which to construct a narrative explaining how distance education came to occupy a place in the core Treaty of the European Union. Table 3 summarises the chronological development of the key problem and policy streams, illustrating the parallel development in distance education from the 1950s to 1991 when it could be said that a policy window opened for distance learning.

### **Post Maastricht – Open Distance Learning to Elearning**

Post Maastricht, despite some residual opposition and doubts among some Member States about the cultural and market orientations of distance education, ODL had become a relatively 'safe option' for the EU to support its policies on lifelong learning and social cohesion. For a short period after Maastricht it appeared that ODL was top of the Commission's agenda in terms of addressing skills shortages to enable Europe

to combat global competition, especially from the US and Japan, as well as contributing to social cohesion and the European dimension.

**Table 3: Open Distance Learning Arrives On The EU Agenda: Summary**

<b>Date</b>	<b>The ‘Problem Stream’ – Technology And Economic</b>	<b>Distance Education Stream</b>	<b>EU Policy Stream</b>
1950s	Sputnik launched 1957; experiments 1958 with computer aided instruction (USA)	Correspondence education dominated by private sector; CNED (est 1939) the only state sponsored distance education system in EU countries.	1957 Treaty of Rome signed by Belgium, France, Germany, Italy, Luxembourg, and Netherlands; no direct reference to education.
1960	Developments in technology leading to loss of jobs in traditional industry; new skills needed; First communications satellite launched in US; Experiments with PLATO ‘teaching machines’ in US schools.	1962 European Council for Correspondence Education established.	1961 Commission makes proposals for a common vocational training policy; refers to teaching methodologies; lifelong learning; access to all; inclusive definition of education and training; 1963 Council agrees policy – foundation for later developments in EU policy-making in education.
1965	1969 Arpanet system developed (precursor of Internet); labour market difficulties; high youth unemployment.	1968 European Home Study Council established; start of public sector involvement in distance education with establishment of OU in UK in 1969, adopting multi media approach.	Policy-making in education and training goes quiet; this was a period of ‘Eurosclerosis’. Main activities involved ‘studies, conferences, seminars and exchanges’.
1970	Oil shocks; recession; growing unemployment 1971. First email message sent; 1971 Intel invents microprocessor	National debates on distance education; establishment of OUs in Spain, and Germany; European distance education largely based on correspondence tuition supplemented with face-to face-tutorials; multi media using television and radio broadcasts used by Open Universities.	Revival in educational policy-making; 1971 First meeting of EU education ministers; DGXII takes responsibility for education; Council guidelines for action programmes link education and training; mention of correspondence education; 1971 Council of Europe proposes European Television University; 1973 Janne Report recommends European Institute and lifelong learning; comments on OUs; 1973 UK, Denmark and Ireland join EU; Hywel Jones joins DGXII. 1974 Commission focuses on mobility, languages, and European dimension.
1975	PC ‘revolution’ starts: 1975 First personal computer launched; 1979 First proprietary online service - CompuServe	Distance education consortia set up in Scandinavia	1976 First Education action plan adopted; main focus initial education; education seen as key component in economic development; supports cooperation in higher education; but progress slows; 1978 Bonn meeting discusses new technologies; 1979 First direct European Parliament elections.
1980	Unemployment crisis 1980s; PCs become more widely available and affordable: 1981 IBM PC based on MS-DOS launched followed in 1983 with Apple 2e and other PCs; developments in software increase user accessibility; the Information society is on the horizon.	1981 Dutch OU set up; 1982 Oscail established in Ireland; 1980s increasing use of IT for administration and text production; Experiments in CBT; interactive video etc.	1981 Education moved to DGV, linked with social and employment affairs; 1982 Commission policy focuses on NITs; 1983 Council resolution on NITs in education and training followed by series of transnational seminars on role of NITs. 1984 Conclusions of Ministers of Education – distance education seen in context of disabled and illiteracy. Concerns with the People’s Europe; preparations for Single Market to include education and training.
1985-1991	Concerns with competition from Japan and USA; Europe falling behind in technological innovation; developments of networked microcomputers fuelling economic development.	National Technological University (NTU) launched in US – interest in satellite-based delivery grows.  Distance education networks set up to develop activities at European level and to benefit from EU funding and support: SATURN (1986); EADTU (1987); EUROPACE	1985 New commission president Delors takes over; Single European Act signed 1986; education and training linked with 1992 project; 1985 Gravier case provides legislative support for COMETT, DELTA, ERASMUS and EUROTECNET programmes. Funding becomes available for distance education projects; Commission supports developments in satellite technology. The policy window opens: 1987 Ewing report recommends European Open University; resolution adopted by European Parliament. 1991 ODL Memorandum 1991 Commitment to ODL inserted into draft Treaty of Maastricht

Source: (MacKeogh, 2005: 94)

However, by 1993 the high profile of distance education began to wane, as the Commission struggled to come up with an initiative which would constitute an effective programme of encouragement for distance education. The post-Maastricht period in Europe encountered a series of new and recurring problems, including the challenge to employment, the need for lifelong learning, as well as the challenges and opportunities posed by the explosion of the Internet and the WWW. These issues allowed the focus on distance education to slip, as attention was increasingly drawn to the use of the new technologies in education and training (which were not necessarily synonymous). By the end of the 1990s, ODL equated solely with the use of technology, and not as before, a flexible way of extending access to education to those who were unable to attend full-time or part-time education on campus.

The conclusions of the Lisbon Council meeting in March 2000 have had far-reaching consequences for EU education policy (Hingel, 2001: 14). In addition to the challenges facing Europe, of globalisation, competition and demographic change, other challenges in the shape of educational shortfalls were apparent: large numbers of adults had not completed second level education, and less than 10% of the population were taking part in further education or training (van der Pas, 2002: 2). While the general levels of education in the Community have increased significantly since the 1970s, there is still a residual core of disadvantaged adults who have not completed second level education, especially in Greece, Italy, Spain and Portugal. In addition, the lifelong learning agenda requires that even those who have completed higher education will need continuing access to opportunities for updating and upgrading qualifications.

The Lisbon Agenda set explicit aims and guidelines which Member States were expected to adopt in their education policies by 2010. The resolution on 'The Concrete Future Objectives of Education Systems' set three main objectives for education systems and thirteen sub-objectives which included a commitment to increasing the participation of adults with less than upper secondary education in adult education or training programmes, as well as the number of those aged between 25 and 64 in education and training in general.<sup>3</sup> Since 2005, it has been accepted that there the Lisbon Agenda for education and training comprises five core objectives and sixteen indicators:

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<sup>3</sup> SCADPLUS Concrete Future Objectives of Education Systems updated 17 June 2003; available at <http://europa.eu.int/scadplus/> accessed 7 July 2004.

**Table 4: Lisbon Objectives 2005 and Indicators 2007****Core Objectives:**

- 1) No more than 10% early school leavers
- 2) Decrease of at least 20% in the percentage of low-achieving pupils in reading literacy;
- 3) At least 85% of young people should have completed upper secondary education;
- 4) Increase of at least 15% in the number of tertiary graduates in Mathematics, Science and Technology (MST), with a simultaneous decrease in the gender imbalance;
- 5) 12.5% of the adult population should participate in lifelong learning.

**16 core indicators for monitoring progress towards the Lisbon objectives in education and training agreed at European Council May 2007:**

- |   |   |
|---|---|
| 1) Participation in pre-school education        | 9) Upper secondary completion rates of young people         |
| 2) Special needs education                      | 10) Professional development of teachers and trainers       |
| 3) Early school leavers                         | 11) Higher education graduates                              |
| 4) Literacy in reading, mathematics and science | 12) Cross-national mobility of students in higher education |
| 5) Language skills                              | 13) Participation of adults in lifelong learning            |
| 6) ICT skills                                   | 14) Adult skills  |
| 7) Civic skills                                 | 15) Educational attainment of the population                |
| 8) Learning to learn skills                     | 16) Investment in education and training                    |

Source: (CEC, 2007)

While elearning was adopted as a central pillar for the achievement of the EU Lisbon strategy in the early stages, especially with the launch of the eLearning Initiative (2004-2006), it is interesting to note that the Commission in its most recent announcements makes no reference to the proven potential of distance education (whether using technology or not) to meet the demand for lifelong learning, nor is elearning or distance education mentioned in the core objectives or indicators. Generally where the use of technologies is mentioned, it is assumed that these will be more cost-effective, despite the continuing existence of the digital divide (James, 2008). In the next section we will discuss the role of policy makers in bringing distance education and elearning into the policy stream in the first place.

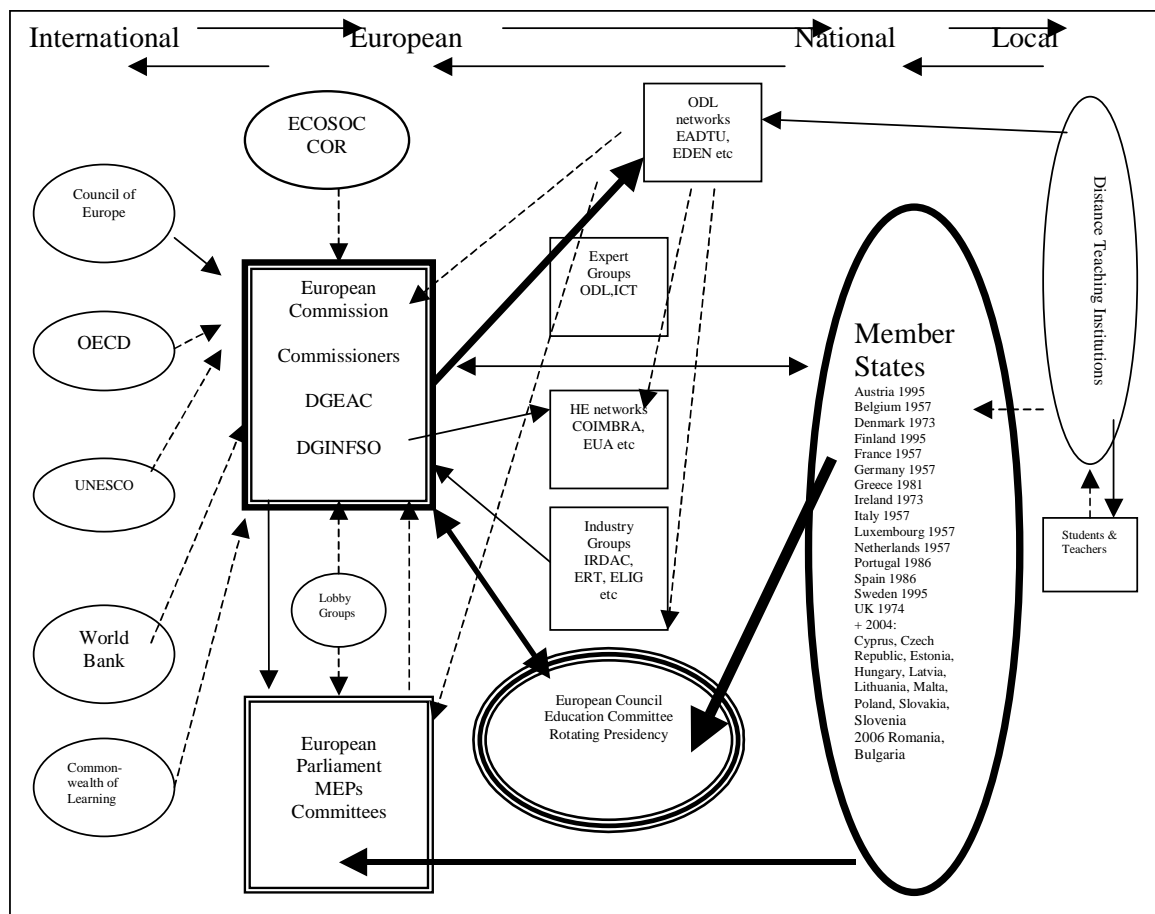
**Who are the policy makers?**

An explanation for the rise and decline of distance education in the policy stream lies, partially, in the complex nature of EU policy-making and the interaction between institutions, groups and individual actors. The development of EU policy on distance

education took place within a complex policy network comprising the EU institutions (the Council, the Commission, the European Parliament and the Comitology Committees) with links to a plethora of European ODL and Industry networks, as well as lobby groups and expert groups. Other actors at the national level included Member State Ministries, as well as ODL institutions; while international organisations including the OECD, the World Bank and UNESCO also played a role in promoting policy ideas. By the time of the publication of the *ODL Memorandum*, in 1992, a critical mass of distance education institutions had been established at national level, and a number of transnational networks had been established, including: the EADTU (European Association of Distance Teaching Universities); SATURN, drawn from members of EADTU as well as industry; two satellite networks: EuroSTEP and EuroPACE; and EDEN the European Distance Education Network, which drew members from the Central and Eastern Europe as well as the EU Member States. There were many contacts and consultations between the Commission and the ODL networks between 1989 and 1991, and there is no doubt that the networks had significant influence on Commission proposals at that time.

Richardson points out that different concepts are helpful at explaining different stages of the policy-making process: epistemic communities at agenda-setting stage; the policy network model for policy formulation; institutional analysis for policy decision-making; and inter-organisational behaviour and implementation analysis for the implementation stage (Richardson, 1996b: 5). He compares the EU policy-making process to an iceberg, with 90% of the process taking place below the surface; in attempting to make sense of this process, he argues that progress can be made through focusing on 'policy actor behaviour as well as on institutions and institutional relationships' (Richardson, 1996b: 20) .

Policy networks comprise actors drawn from a range of sectors who interact to influence policy outcomes towards their own interests. Raab has suggested the necessity of studying the micro level of personal networks, including the behaviour and values of individuals in order to render policy related action and outcomes intelligible (Raab, 1992: 77). 'The policy network model is a useful heuristic device for describing the complex relationship between government departments, interest groups and other relevant agencies or individuals involved in policy-making' (Daguerre, 2000: 257). Pemberton recommends mapping the relationships between networks as these can reveal that actors 'who are seemingly peripheral to the core decision-making community can play a role, sometimes an important role, in the making of policy' (Pemberton, 2000: 789). Figure 1 is an attempt to map the relationships between the different levels of organisational actors in the European ODL Network. This diagram maps the way in which organisations interact at four levels: international, European, national and local.



**Figure 1: European Open Distance Learning Policy Network**

The central role played by the European Commission as the key permanent presence in the EU landscape, is demonstrated by its links with multiple organisations. The strength and direction of the influence between organisations and networks is indicated by the width of the arrows which also indicate whether influence is two way or one way only. Thus, the ODL networks have some influence on the Commission in their involvement in expert committees and direct contacts, but the Commission exerts greater influence on the networks, through favouring particular policy directions and providing or, indeed, refusing funding. Member States exert a strong influence at Council level, but the responsibility for implementation of policy lies with the Commission.

Political scientists have found Haas's (1992) epistemic community and Sabatier's (1988) advocacy coalition concepts helpful in explaining how certain policy ideas become accepted. However, there is no evidence of the existence of an epistemic community, as defined by Haas, driving forward an agreed agenda on the role of ODL. Instead, the plethora of conflicting networks and interest groups served to dilute the policy-making process during the 1990s, leaving no clear focus on the future development of ODL. Efforts by the Commission to encourage more cooperation between networks proved unsuccessful, largely because these networks were competing in the same field for limited funding; in addition, some of the larger open

universities were competing against each other in the European market for students. It would appear that the EADTU successfully acted as an advocacy coalition in its opposition to the proposed European Open University. However, the attempt to set up a countervailing network comprising existing institutions almost bankrupted EADTU, and the distance education landscape in Europe was left with no enduring legacy of its time in the European limelight. While the EADTU managed to survive, and retains continuing links with the Commission, the three other networks mentioned in the Commission's *Memorandum on ODL* went out of existence in the early 1990s. While still at the development stage, the EU's proposals to set up a European Institute of Innovation and Technology with broad goals to stimulate innovation may yet meet with a similar fate to that of the European Open University.

While it is beyond the scope of this paper to discuss the role of individual actors in ODL policy formation in any detail (see MacKeogh, 2005 Chapter 7) it should be noted that a number of key policy entrepreneurs in the Commission were crucial in driving forward the ODL agenda between 1985 and 1994; they were joined by a number of officials seconded from the open universities who were fully *au fait* with the distance education field. These policy entrepreneurs spotted the opportunity within the EU to promote the transnational dimension of ODL when the demands of the completion of the internal market identified new responsibilities for education and training. The entrepreneurs in the Commission (e.g. Hywel Jones and Ricardo Charters d'Azevedo) fostered network formation through their presence at founding meetings; funding for seminars; and consultations on policy development. There were close links with the EADTU when its secretary was seconded to work on the Commission's ODL policy proposals. However, when Hywel Jones left the Task Force in 1993, to be followed soon after by other key officials, the level of expertise and knowledge of ODL, as well as the commitment to the ODL agenda within Commission diminished. Instead, Commission Officials responded to the technological imperative, as demanded by the new Information Society initiatives, and with some few exceptions, policy amnesia set in, and ODL was no longer referred to in EU discourse.

As networks competed for funding from the limited EU funding, only the 'fittest' survived, but so much energy had been expended in defending interests and ensuring survival that there was little energy to invest, particularly after 1995, in ensuring that the Commission continued to develop policies in line with the aims and objectives of distance education. In the end, the ODL networks went along with the Commission's shift towards integrating technology and multi-media in conventional education, and found, as a consequence, in 2008 that they no longer occupy a central role in the policy landscape. Instead, they compete with a range of interest groups including traditional universities, and industry groups (such as ELIG, the eLearning Industry Group) for the support of the Commission, with little effect in recent years. Commenting on the perceived loss of influence, the European Open Distance Learning Liaison Committee (a consortium of networks set up to advise the commission) commented in 2004:

eLearning has almost completely disappeared from top-level policy speeches, both as a term suspected of having lost its impact, and - more seriously- as a significant component of educational policy. In part this is due to the fact that education has lost weight on the overall policy agenda due to the increased concerns on security and the need to concentrate resources elsewhere (a

significant number of EU countries have decreased the weight of educational expenditure on GNP in the last years). Many encouraging developments have taken place also thanks to EU support, but those who were resisting eLearning from inside the education and training systems had the time to build their case against it, at least partly due to very low quality and simplistic promotional messages associated to first (and second) generations of eLearning provision.' (ODL Liaison Committee, 2004).

In its 2006 submission on the Lifelong Learning Programme proposals to the Commission, the Committee concentrated on the terminology of innovation in learning, and restricted comments on elearning to a request for a guarantee that the new Programme pays 'sufficient attention and devotes appropriate resources to flexible and distance learning and technology supported learning, especially for the hitherto neglected areas of informal and non formal learning.' (ODL Liaison Committee, 2006)

### **The Implementation of EU ODL Policies**

Analysis of the programmes adopted by the EU in implementing its ODL policies may also help to explain why the original discourse on distance education as an instrument of social cohesion was constantly diverted into a commitment to innovation defined solely in terms of the use of technology. The Commission had started funding distance education projects as early as 1985. The EUROTECNET programme (1985-1994) supported a number of projects, mainly in vocational training. The COMETT programme (1986-1994) funded the use and application of multimedia and new technologies in education and training and created an opening for distance education institutions and others wishing to adopt distance education to obtain much needed funding. The programme served to stimulate the formation of partnerships and consortia among existing distance education organisations to take advantage of the prospects of relatively significant amounts of funding for joint projects and activities. Another programme, DELTA (1989-1994) was designed to foster European collaborative research on alternative learning technologies (networks, satellites, IT based training products) as well as to test possibilities for European cooperation (Van den Brande, 1993b). Following the Maastricht Treaty, the Commission proposed a new generation of programmes aimed at coordinating and simplifying the programme structure. The Socrates programme, launched in 1995 included a specific action aimed at supporting open distance learning, while large-scale technology-based projects were funded under the research framework programmes. The evaluation of the first phase of the Socrates ODL action commented on the changing technologies, including the use of the Internet, which had altered the focus of the actions over the course of the programme (CEC, 2001). The report suggested, without any further elaboration, that the definition of ODL had proved an obstacle to the participation of some countries, based as it was on Anglo-Saxon and Nordic approaches to ODL.

Proposals for a new ODL action for Phase II met severe resistance from a number of Member States as well as within the Commission. However, Commission officials succeeded, with the assistance of some MEPs, in persuading the Council to adopt the Minerva action aimed at funding ODL and ICT projects for a further four years. The evaluation report rated the Minerva action as 'relevant and effective. It responds perfectly to the programme objective of encouraging innovation in the development

of teaching practices and materials.’ (CEC, 2004: 26). The results of the consultative exercise in 2003 found little support for the Minerva programme, with one Ministry source quoted as saying Minerva as an action should be discontinued. ‘There is a wide range of European and national programmes providing serious funding for ICT and *it is not evident that Minerva has delivered real added value* [emphasis added]’ (Pole Universitaire Europeen, 2004: 102). The Elearning Action Programme (2004-2006) supported a small number of projects and was regarded as having little impact (Salajan, 2007a). The Lifelong Learning Programme (2007-2013) which replaced Socrates no longer supports a dedicated action on distance education or elearning; instead the assumption is that these have been ‘mainstreamed’ in the education system.

Too much may be expected of EU implementation programmes, which by their nature are limited in scope, funding and therefore impact. A number of researchers have commented on the gap between the rhetoric, ‘the discourse of crisis’ in Field’s term (1998), and the reality of implementation programmes which routinely utilise the same limited suite of modest measures (exchanges, seminars, pilot projects) regardless of the objectives and the outcomes. It is difficult to demonstrate that the EU’s implementation programmes have benefited European distance education in any significant way. Evaluations of action programmes have consistently pointed to the lack of sustainable outputs, despite vast amounts of investment. Yet, the Commission continues to design programmes which favour technology over pedagogy, short-term projects over long-term sustainable solutions; and impose bureaucratic conditions which effectively stifle creativity.

Nevertheless, at the micro level, some institutions, academics and students benefited from their exposure to the European ODL arena through adoption of new ideas, expertise and openness to innovation (see MacKeogh, 2005). Some ideas generated through projects become commercially successful in the long-term; distance education institutions were enabled to evaluate the effectiveness of different technologies which could later be mainstreamed if they proved successful; while some projects contributed to the development of human capital in the form of skills and expertise. Research is needed to investigate the long-term impact of these programmes.

### **Some conclusions**

As this paper has demonstrated, distance education and training in general started from a peripheral position at the inception of the EU in 1957, but moved in and out of the policy stream until the Maastricht Treaty opened a policy window. It did so because over the years distance education practitioners had worked to improve teaching methodologies and were comfortable with the idea of using a range of media to replace face-to-face instruction. It also did so because it could offer opportunities to extend access on a second chance basis for relatively low cost at a time when unemployment in Europe was increasing and the technological revolution was overtaking society. However, following Maastricht, the distance education policy stream was captured by another stream of policy-making, driven by a fascination with the potential of the ICTs. In the Commission’s view, distance education (or elearning) has been mainstreamed in European higher education, however, little empirical evidence is available to support this view. There is considerable activity at institutional and network level throughout Europe in elearning with many elearning

conferences and events. It would appear that very few universities in Europe do not use some forms of ICT in their teaching and administration. However, if elearning is used mainly to benefit on-campus students, it has failed to reach out to those who are unable or who do not wish to attend on-campus. In this scenario the role of technology has served only to diminish the original role of distance education in reducing disadvantage and in building social cohesion, a factor which should be of concern in the context of the link made in the Lisbon objectives between growth, competitiveness, and social cohesion.

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