



# Encouraging Distance Education? An Analysis of EU Policy on Distance Education, 1957-2004

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By

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## **Declaration**

I declare that this thesis has not been previously submitted for a degree at the National University of Ireland Maynooth or any other University. I further declare that the work embodied in this thesis is my own. I agree that the library may lend or copy this thesis on request.

Kay Mac Keogh



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# **ENCOURAGING DISTANCE EDUCATION? AN ANALYSIS OF EU POLICY ON DISTANCE EDUCATION, 1957-2004**

Katherine M. Mac Keogh

## **Summary**

This thesis analyses the development and implementation of the European Union's policies in distance higher education 1957-2004; it identifies the actors involved in developing these policies; and it investigates the barriers to implementation in the form of the digital divide and attitudinal factors. From the 1960s, the pace of technological and economic change led to obsolescence of skills, and a demand for a more educated workforce. Distance education emerged in the 1960s and 70s as an instrument at national level to redress disadvantage, and to provide flexible, high-quality and cost-effective access to higher education to adults who were unable, for geographical, employment or personal reasons, to attend on-campus. The expansion of distance education led to the opening of a policy window in the 1980s with the Maastricht Treaty (1992) commitment to 'encouraging the development of distance education'. Supported by influential policy entrepreneurs and networks, distance education held centre stage in European Union education and training policy for a brief period in the early 1990s. However, by 2004, a form of policy amnesia had set in. Despite rhetorical references to social cohesion in the context of the Lisbon goals of making Europe the most competitive economy in the world, the original concept of distance education had been superseded by an unquestioning acceptance of ICTs as the solution to the problem of lifelong learning. Yet, analysis of the digital divide in Europe and a survey of student attitudes to ICTs and elearning, reveal formidable barriers to the adoption of technology-led solutions. The thesis concludes that the European Union has sought to encourage the use of technology in education and training. However, it has failed to encourage the flexibility in terms of time, place, pace, and indeed accessibility, which would enable adult students to participate in education on a truly lifelong learning basis.

### Abbreviations Used in this Thesis

AECS	Association of European Correspondence Schools
CEDEFOP	European Centre for the Development of Vocational Training (Centre Européen pour la développement de la formation professionnelle)
COMETT	Community programme for Training in New Technologies and Cooperation between Universities and Industry. EU programme linking universities with industry
DELTA	Developing European Learning through Technological Advance - EU programme to improve education using new communications technologies
EADTU	European Association of Distance Teaching Universities
EDEN	European Distance Education Network; since 2003 Europe Distance eLearning Network
EOUN	European Open University Network
ERASMUS	EU programme to support trans-European mobility of students and staff in higher education
ERT	European Round Table of Industrialists
ESC	Euro Study Centre Network established by EADTU
ESIB	National Union of Students in Europe
EUA	European University Association
EuroPACE	European Programme for Advanced Continuing Education
EuroSTEP	European Association of Users of Satellites in Training and Education Programmes
EuroTECNET	Community Action Plan to promote innovation in the field of vocational training in the new technologies
EU	European Union
ICDE	International Council for Distance Education
ICDL	International Centre for Distance Learning, Open University Milton Keynes
IRDAC	Industrial Research, Development and Advisory Committee
MEP	Member of the European Parliament
NDEC	Oscail – National Distance Education Centre Ireland
ODL	Open and distance learning
OU	Open University
OUNL	Open Universiteit Netherlands
OUUK	Open University United Kingdom
Phare	EU programme to provide support in the reconstruction of Central and Eastern European Countries
SATURN	European network for education, training and industry in distance education
TEMPUS	Trans-European Mobility Scheme for University Studies. EU programme supporting higher education in CEEC

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## **Chapter 1: Introduction**

### **1.1 INTRODUCTION**

The Treaty of Maastricht signed, in February 1992, committed the European Union<sup>1</sup> to ‘encouraging the development of distance education’.<sup>2</sup> The main aim of this thesis is to explain why distance education became enshrined in the core treaty of the European Union, and to investigate to what extent, if any, the EU has encouraged the development of distance education in Europe. However, the thesis goes beyond an historical account of the development of a specific policy area. By analysing the contribution of key actors in the policy formation process, evaluating the implementation process, and investigating possible barriers to implementation in the form of the digital divide and student responses, the thesis aims to present a detailed case study on the rise and decline of a policy idea. The EU is playing an increasingly active role in all aspects of life, learning and work in its Member States and its decisions have the potential to affect over 450 million people. Yet, it is only in recent years that researchers have started to pay attention to the impact of the EU on higher education policy, and no exhaustive analysis of its policies on distance education has been carried out to date. As this thesis will demonstrate, it is essential to subject EU policy to critical scrutiny to ensure that the impact of decisions, made by the EU, on individuals and institutions throughout the farthest reaches of Europe, are clearly understood. This chapter introduces the main research questions tackled by this thesis; the thesis structure will then be outlined; and the chapter will end with a discussion of the relevance of this study as an original contribution to the fields of distance higher education and European policy development.

### **1.2 FROM DISTANCE EDUCATION TO ICTs**

Distance higher education has a long history, going back to the nineteenth century when universities in England and the United States started teaching students through correspondence. Its reputation in the US became tarnished through profiteering, especially by private providers (Noble, 2002); and in Europe it was seen as being a second best alternative to on-campus education (Rumble, 2001a). However, by the 1970s, the reputation of distance education had been enhanced by the establishment of high status, publicly funded open universities, starting with the Open University in the United Kingdom, and followed by the open universities in Spain, Netherlands, and Germany. The primary aim of these open universities, and other distance education institutions which were established in the 1970s and 1980s, was to redress disadvantage by extending access to higher education to adults, who for a range of reasons were unable to attend on-campus education. These institutions developed a range of techniques and methodologies which improved the quality of learning of their students and provided a flexible and accessible form of education for a broad sector of the adult population.

The signatories of the Treaty of Rome in 1957 had not envisaged a role for education in the European Community; nevertheless, through a combination of action programmes, legal

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<sup>1</sup> The institution established by the Treaty of Rome 1957 was called the European Economic Community; it was renamed the European Community by the Maastricht Treaty, which also established the European Union, within which the European Community remains a separate entity (Bainbridge, 2002: 203). The practice now is to refer to the institution as the European Union, or EU, or the Community and these designations will be used in this thesis unless direct quotations are being used.

<sup>2</sup> Article 126 Treaty of Maastricht, renumbered Article 149 in the Amsterdam and Nice Treaties. See Appendix 1 for the text of articles relating to education and training.

judgements and strategic developments over the years, education and training came to occupy a key role in the EU's Lisbon strategy to make Europe 'the most competitive economy in the world' (CEC, 2000f). In the 1980s, distance education was introduced, at national level, as an important instrument in promoting social cohesion through redressing disadvantage and upgrading the qualifications of the workforce. The status of distance education was formally recognised when the EU published its *Memorandum on Open Distance Learning* in 1991 (CEC, 1991b) and the commitment to distance education was written into the Maastricht Treaty (1992). Yet, almost from the beginning, attention at EU level was focused on the methodologies and technologies used by distance education (rather than the aims and target groups). Open Distance Learning (ODL), in EU thinking, became identified with the use of technology in education and training in general. The term, elearning, emerged in the late 1990s and quickly replaced ODL in EU discourse. eLearning was promoted as the driver and catalyst for radically reforming the entire education and training system to cope with the demands of the new knowledge society, and all levels of education, schools and universities were called on to adopt elearning in the classroom (CEC, 2002a). However, by 2004, ODL or distance education had disappeared from the EU vocabulary and there were signs that elearning had run its course (CEC, 2004b; Keegan, 2002). Instead, the term ICTs (information and communications technology) was more widely used in the documents on future EU initiatives in education and training.

There is no doubt that technology transformed many aspects of economic and social life in the latter part of the twentieth century. This led to pressures to achieve competitiveness in the global context, and all societies were urged to become 'Information Societies'. Education systems are under pressure from national and transnational agencies such as the EU, the OECD, and the World Bank as well as industry and commercial forces to adopt the use of ICTs. It is clear that education must prepare students to work in a society that requires technological literacy. However, there are concerns that making ICTs an essential element of distance education will lead to a digital divide, and will serve to increase, rather than reduce, social exclusion. The issue of cost and pedagogical effectiveness of the new technologies is still a matter for debate, and there is also a concern about resistance to innovation. There is, therefore, a tension between policy-makers imposing innovation from a top-down perspective and the concerns of potential adopters – institutions, teachers and students. The successful adoption of ICTs in education requires a receptive environment. It is hypothesised that the slow adoption of ICTs in ODL compared with a much faster take-up in conventional education, has arisen because the top-down approach has ignored or failed to address the legitimate concerns of end-users, the traditional student in distance education. These concerns include access to the technology, expertise and efficacy, and attitudes to learning with technology. The thesis will explore the individual perspective on elearning as a mode of learning, as well as the role of the EU in educational policy-making. The analysis is informed by cross-cultural perspectives through comparing groups of students from different countries.

Thus, this thesis focuses on two ends of the spectrum of ODL policy development and implementation: the EU and national policy makers at one extreme, and students at the other end, on whose behalf decisions are made, but who are rarely consulted for their views. The thesis will demonstrate the gradual convergence of ODL, in the official rhetoric, with mainstream education. ODL, in 2004, appears to be regarded as synonymous with the use of ICT to the extent that the term ODL is now rarely used in EU communications. Before discussing the significance of this development the structure of the thesis will be outlined in the next section.



### 1.3 THESIS STRUCTURE

The research for this thesis start with a wide-ranging review of literature relevant to ODL, education policy, educational technology, adult education, European studies, political science, sociology, and history. As discussed in Chapter 2, the quality of research on distance education has been a matter for concern for many years, with much criticism of the lack of theoretical frameworks, methodological rigour and restricted areas of study. One of the areas identified as requiring study is that of policy. In view of the growing significance of EU involvement in education and training policy in general, it was decided to investigate the evolution and impact of EU policies on ODL and elearning within a social, political, and individual learner context. The literature review clarified six research questions to be investigated in this thesis:

- How and why did ODL and elearning evolve as an instrument of EU policy between 1957 and 2004?
- Who are, and were, the actors involved in the ODL and elearning policy development process and to what extent do insights from political science contribute to an understanding of their role?
- Is there a gap between the rhetoric and the reality of implementation of these policies?
- What are the consequences of the technological imperative for social cohesion – is there a digital divide in Europe, and if so, what is the response from Member States?
- How do distance education and elearning policies developed by the EU resonate with students?
- What is the cumulative impact of EU policies on ODL, or to what extent has EU policy encouraged the development of distance education in Europe?

As discussed in Chapter 3, the thesis uses a case study approach, combining both qualitative and quantitative methodologies, comprising: documentary analysis of primary and secondary sources; interviews with key actors in the Commission and the ODL networks; examination of the implementation of EU ODL policy in the form of action programmes (e.g. COMETT, DELTA, EUROFORM, Socrates, Leonardo etc.); analysis of national policies on ICTs and the Information Society; study visits and a transnational questionnaire on the response of students to EU elearning policies. The thesis also draws on the author's experience of over fifteen years as an observer and participant in EU and national policy-making on ODL.

Chapters 4, 5 and 6 analyse the historical development of EU ODL policy. The driving forces which led to the enshrining of distance education in the Maastricht Treaty are discussed, and the subsequent decline of distance education as a key policy concern is charted through analysis of a series of policy documents and reports. The framework of analysis has been adapted from Richardson's (1996b) four stage policy process (agenda-setting, policy formulation, policy decision and policy implementation), and Kingdon's (1995) policy streams approach. Kingdon identified three process streams at work at the agenda setting stage: the problem stream, the policy stream and the politics stream. In the *problem stream*, issues are recognised as significant problems (e.g. skills gaps, or creation of a European identity) 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 of elections, national and EU governmental 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. Chapters 4, 5 and 6 will focus in detail on how the different ideas and solutions in the distance education and the technology streams evolved over the years and entered the policy stream when the EU encountered a series of problems including: the impact of new technologies on the workforce and the economy, leading to skills shortages in the 1970s and 80s; the completion of the single market project leading to calls for a people's Europe by the early 1990s; the enlargement of the Community; and the call for growth and competitiveness linked with the process of globalisation and the knowledge society, culminating at the Lisbon European Council in March 2000. The Lisbon Council may be said to have ushered in a new era of EU policy-making by setting

a new strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion (CEC, 2000f).

These problems served to open a policy window for distance education, although it will be argued that over the course of the decade between the Maastricht Treaty, and the eLearning Initiative which emerged from the Lisbon process, the definition and role of distance education changed considerably. Chapter 4 sets the scene by analysing the development of policy between the Treaty of Rome in 1957 and the adoption, thirty years later, by the European Parliament of a resolution on open universities in 1987. Chapter 5 takes up the account by analysing the increasing urgency in policy-making leading to the publication of the ODL *Memorandum* and the insertion of distance education in the Draft Treaty in 1991, followed by increasingly inept attempts to embed ODL policy through EU actions in the next two years. Chapter 6 outlines the way in which a growing concern with economic and political problems revolving around growth, competitiveness and employment, enlargement of the community, but above all the Information Society, led to an exclusive emphasis on the role of technology and multimedia or elearning in preparing all of society to adopt new ways of learning within a lifelong learning paradigm. By 2004 the Commission had decided that elearning had been mainstreamed in all levels of education and training, thus requiring no further direct action at EU level. This chapter finishes with a discussion of the way in which ODL and elearning came to be erased from the EU education and training policy agenda.

Chapter 7 examines the agenda setting, policy formulation and decision phases, asking who were, and are, the key actors in EU ODL policy. The chapter looks to a number of perspectives from political science in an attempt to explain the role of these actors, including policy entrepreneurs, policy networks, epistemic communities and advocacy coalitions. This analysis will highlight the key role played by the European Commission in leading and driving policy in the past, but will indicate that the way in which new methods of governance, including the open method of coordination, are increasingly restricting the Commission's room for manoeuvre and opening up their decisions and proposals to greater scrutiny than in the past. It will also demonstrate that the ODL networks failed to capitalise on their earlier influence with the Commission when the focus of policy-making moved away from distance education in the late 1990s.

Chapter 8 examines the way in which the EU has attempted to implement its policies through a series of action programmes over a twenty-year period. For many reasons, researchers have encountered difficulties in carrying out a comprehensive, independent evaluation of these programmes, and such an evaluation is outside the scope of this thesis. The chapter will assess the contribution of some nineteen different action programmes to the development of ODL between 1985 and 2004. The impact of these implementation programmes on institutions is illustrated through two case studies, the first on the development of a commercially successful virtual learning environment (TOPCLASS) which was funded initially by the DELTA

programme; the second reviews the cumulative impact on Oscail – the National Distance Education Centre in Ireland, of participation in a series of action programmes over a period of seventeen years. These case studies will illustrate the difficulties in assessing the effectiveness of implementation programmes, and the sometimes unanticipated consequences of particular actions.

Chapter 9 considers a major barrier to implementing the EU's technocentric strategies for ODL and elearning, the divide between those with access to the technology and those without. The chapter discusses the debate surrounding the nature of the digital divide, then maps the existence of the digital divide as it occurs in EU Member States, presenting statistics gathered from a range of EU surveys. An analysis of Member State strategies shows a remarkable convergence of strategic initiatives centred on the EU Information Society and eEurope initiatives. The chapter ends with a discussion of the effectiveness, or otherwise of these attempts to bridge the digital divide.

With the EU and other policy-makers making radical prognostications about transforming education through the use of technologies, it would seem important to establish how these plans resonate with those who are expected to learn in these new ways. Chapter 10 considers a set of major stakeholders rarely consulted with regard to the impact of EU education policies – students. It is important to know if students will have access to the technology, will they be able to use it, do they want to learn using technology and in what way, and finally do they think the EU should be involved in deciding how they learn? This chapter reports on the results of a questionnaire comprising a series of measures of student access to technologies, their experience and expertise in using technology, and their attitudes to using technology in education, as well as their responses to the role of the EU as a policy-maker in education. To ensure a comparative perspective, distance education students and on-campus students were surveyed. Over 750 responses in total were received from students in Oscail and Queens University Belfast. Data drawn from a study of students in twelve European universities, which used similar questions, are analysed in this chapter for transnational comparative purposes (SPOT+, 2003). As will be seen, all students have access to a PC in the university, and over 90% have access either at home or in work. However, the quality of access varies, as does the level of expertise among both distance learners and on-campus students. Most tellingly, neither group is happy with the prospect of replacing human contact with technology. Less than one in ten students would accept a total elearning solution with all learning online, while approximately one fifth of students would actively resist any application of technology in their learning. Respondents were also wary of EU involvement in dictating learning approaches and methodologies, although they were supportive of an EU role in funding and quality promotion.

Chapter 11 summarises the findings of the research and draws conclusions about the state of ODL in the Europe of today. As will be seen, the rate of adoption of distance education, and later elearning has failed to reach the high expectations of both the Commission and the ODL institutions. The constant prioritising by policy makers of technology over pedagogy has resulted in billions of Euro being expended on a plethora of one off pilot projects, with relatively few sustainable results. Despite the rhetoric of lifelong learning, the Commission has increasingly targeted initial education at school and university level in its efforts to embed new technologies in the education and training system. It has failed to take into account the day-to-day reality of distance learners and distance education institutions in its search for futuristic solutions. While distance education continues to meet real needs and evolve at the pace of its learners, it appears that ODL, as experienced by over one million distance education students in Europe, is no longer of interest to EU policy-makers. This thesis argues

that this would be an unfortunate policy choice in the context of efforts to introduce an overarching lifelong learning paradigm in Europe.

#### **1.4 SIGNIFICANCE OF THE STUDY**

It is envisaged that this thesis will make a significant and original contribution to the scholarly literature on EU policy in distance higher education and elearning. While Neave (1984; 1986; 1988; 1991; 1994) and Field (1997a; 1998; 2002a) have written a number of key texts on EU educational policy, the literature on EU policy on distance education and elearning is relatively sparse, consisting mainly of descriptive case studies delivered at conferences or in unpublished reports. An extensive search of the literature has revealed a small but growing number of PhD and Masters dissertations which have analysed EU educational and vocational policy from a political science perspective (see Blitz, 1998; Corbett, 2002; Dunning, 1998; Katsirea, 2001; Nihoul, 1999; Wickham, 1981). While Tait (1995) researched EU ODL policy between 1987-1994 for a Masters dissertation, no systematic attempt has been identified which tracks the course of development of distance education policy, since the inception of the EU in 1957, to the present. It is an important task in itself to document this background to ensure that history is neither forgotten nor ignored as time passes and those involved in the early days of policy-making move on. Often, lack of historical awareness produces a form of policy amnesia, leading to, at best, the constant reinvention of wheels, and at worst, failure to learn from past mistakes. However, the significance of the thesis lies in its going beyond historical analysis of the key milestones in policy development. By investigating the role of actors in distance education policy-making, evaluating the implementation of these policies, and examining the potential barriers to implementation, it represents a rounded case study of distance education policy in Europe.

In addition to its contribution to the scholarly literature, this thesis deals with an issue, which is, or should be, of concern to policy-makers at European and national level, as well as a wide range of stakeholders, including teachers and students. As this thesis will show, distance education in EU thinking has become inexorably linked with the use of technology. The advantages and benefits of technology are often offered as unquestionable truths, yet these claims are rarely tested and subject to analysis. There are dangers in jettisoning a distance education perspective for a one size fits all solution based on the use of ICTs in education and training. It is argued that policy-makers, as well as institutions, need to refocus on the problems which ODL was designed to address: to redress disadvantage and to provide flexible access to qualifications for adult students. There is still a sizeable population of adults in Europe who have not completed second level education, and an even greater proportion who have not attained higher qualifications. The adoption of lifelong learning as a new educational paradigm requires that education and training be available to citizens on a lifelong, lifewide basis. This new paradigm will not come about, merely by adding technology to what is there already. One of the key messages of the EU's lifelong learning strategy is to bring 'learning closer to home' (CEC, 2000d: 19). To achieve this, the conventional education and training institutions need to change so that students can access learning opportunities, when, where, and however, is appropriate to their needs and preferences. Distance education, using a range of media (including in recent years, ICTs), has been providing this flexibility to its students for many decades, using methods which are available and accessible to its target population. There is little evidence to show that the increase in use of technology in conventional education has in fact contributed to extending access to lifelong learners. Instead, much of the investment in elearning technologies appears to have benefited an already privileged group of on-campus learners, rather than increasing the numbers of distance learners (Zemsky and Massy, 2004).

Researchers in distance education and elearning have had, by necessity, to draw on a wide range of disciplinary perspectives for explanatory theories and frameworks. In this thesis, political science provides a useful framework for analysis and is joined by pedagogical, sociological, historical and geographical perspectives. In drawing together research on these different strands, it is hoped that these combined perspectives will illuminate a policy area which has received little attention to date from political scientists and indeed from educationalists, but which is of enormous significance for the many stakeholders involved. Thus, while contributing to the body of knowledge in distance higher education, it is hoped that it will also influence policy-makers and institutions to take a renewed interest in the potential of distance education as an instrument for implementing lifelong learning in Europe

## **Chapter 2: Literature Review and Theoretical Framework**

### **2.1 INTRODUCTION**

This chapter attempts to establish a framework for analysing the development and implementation of EU policy in open and distance learning (ODL) through a review of the literature and research from a range of disciplines, including distance education, sociology, European Studies and political science. The chapter is divided into two main sections: the first reviews the literature and research on distance education, and the second discusses EU policy-making and implementation. The first section discusses the problem of varying definitions and terminology used to describe distance education, tracing its development from correspondence education to its current manifestation as elearning. The role played by different generations of technology in distance education is then outlined, followed by a discussion of the problems posed by the digital divide. This section finishes with a review of the critiques of distance education research. The chapter then turns to EU policy-making and implementation, starting with the question of why study EU policy, and then describing a number of analytical frameworks used to investigate the process of policy development and the role of key actors in the policy-making process. This is followed by a discussion of the problems in implementing policies. The extent to which student perspectives have been considered in the development of EU policy initiatives in education is then outlined. The chapter will finish with a review of the research questions which have emerged from the review of the literature and which shape the structure of the thesis.

### **2.2 DEVELOPMENTS IN DISTANCE EDUCATION**

#### **2.2.1 DEFINITIONS**

Many writers have commented on the wide diversity of definitions of distance education (e.g. Evans and King, 1991a; Thompson, 1986). In 1980, the editors of a special edition of the journal, *Higher Education in Europe*, commented on the ‘apparent terminological confusion’ among the articles in the volume, forming ‘an obstacle to a more homogenous, analytical, and conceptualized approach’ (Editors, 1983: 3). Clearly the fact that different countries have varying definitions of distance education arises from differences in language, and education and training systems (Van den Brande, 1993a: 3).

Keegan’s definition is an early and much quoted attempt to capture the key elements of distance education. According to Keegan, distance education is characterised by:

- a quasi-permanent separation of teacher and learner
- the influence of an educational organisation both in the planning and preparation of learning materials and in the provision of student support services
- the use of technical media, print, audio, video, computer, to unite teacher and learner and to carry the content of the course
- the provision of two way communication so that the student may benefit from or even initiate dialogue, thus distinguishing it from other uses of technology in education
- the quasi-permanent absence of the learning group throughout the length of the learning process so that people are more usually taught as individuals and not in groups with the possibility of occasional meetings for both didactic and socialisation purposes
- the presence of more industrialised features than in conventional oral education
- the privatisation of institutional learning (Keegan, 1986: 49).

Rumble and Kaye offered the following definition:

We consider distance education as including any organised form of education in which attendance at a class, tutorial or lecture, or any other form of face-to-face interaction between students and teachers carried out at the same time and in the same place is not the primary learning mode (Rumble and Kaye, 1991: 214).

The EU *Memorandum on Open Distance Learning* defined distance learning as

any form of study not under the continuous or immediate supervision of tutors, which nevertheless benefits from the planning, guidance and tuition of a tutorial organisation...the presence of a strong autonomous component in open distance learning is very much in keeping with the ideas current in higher education of making students more responsible for attaining their own learning objectives (CEC, 1991b: 6).

Recent developments in technology have rendered it possible for students to benefit from group learning facilitated by video-conferencing or computer-conferencing, nevertheless, the key defining characteristic of distance education is precisely the concept of distance between the teaching and learning processes, whether in time or in place.

Part of the confusion in definition has arisen around the variety of labels which have been attributed to this form of education (Garrison, 2000). Originally called correspondence education, in the last two decades a wealth of terms has emerged: distance learning; open learning; open and distance learning; flexible learning; virtual education; distributed learning; online learning; web-based learning; asynchronous learning; e-education; elearning; and more recently, m-learning (Farrell, 2001; Keegan, 2002). Up to the 1970s, the term correspondence education predominated. However, with the foundation of the open universities and the expansion in the range of media used to include non-print based material, 'distance education' was widely adopted. In recognition of changing methods, the International Council for Correspondence Education, founded in 1938, changed its name to the International Council for Distance Education (ICDE) in 1982 (McIsaac and Gunawardena, 1996; Trindade, 1993).

In the mid 1980s, the term open learning came into common currency, as evidenced by the change in title of the UK Open University journal, *Teaching at a Distance* which was renamed *Open Learning* in 1986. Mainwaring (quoted in Kember and Murphy, 1990) in his report for the Scottish Council for Educational Technology defined open learning as providing flexibility in terms of sequencing, place of study, and access to tutors on demand; choice of starting and finishing time and level of support; negotiated objectives, learning methods, and assessment; and open entry regardless of prior qualifications (Mainwaring, 1986). However, the term was not universally welcomed. It became clear that open learning and distance learning were not synonymous and that few distance education courses met the requirements for openness set by Mainwaring (Kember and Murphy, 1990; Rumble, 1989). *Open Learning* published a series of articles in the early 1990s on the meaning of open and distance learning. One of the contributors to this debate, Greville Rumble argued that the term 'open learning' could be construed as a misuse of language when used to describe systems as open, which were in fact closed to participants for a number of reasons, including cost, timing, entry requirements, and restrictions in the corporate sector (Rumble, 1989). Richardson suggested that it was more helpful to address the concept as a continuum of openness, with the degree of openness being determined by the 'political, financial and linguistic approach of the writers' (Richardson, 1990: 45). Nation argued for the inclusion of open learning as a complement to distance learning, rejecting suggestions that boosting open learning equalled denigrating distance learning, agreeing with Rumble's most important message, i.e. that closure in education must be rejected (Nation, 1990). The EU appeared to settle the matter of terminology by electing to use the term 'Open Distance Learning' in its *Memorandum* in 1991; however, even here lack of consistency resulted in variations in



terminology, including open and distance learning, open learning and distance learning, open distance education etc. (CEC, 1991b).

The introduction of the term elearning at the end of the 1990s has served to confuse matters even further. Rosenberg includes three criteria for elearning: it is networked; delivery to the end user (i.e. student) is by computer using Internet technology; and it focuses on learning solutions that go beyond traditional paradigms of training (Rosenberg, 2001: 28/9). The EU simply defines elearning as ‘the use of information and communication technology, including the Internet, to learn and teach’ (CEC, 2001b). In the next section, a brief overview of the historical development of distance education will be outlined.

## 2.2.2 HISTORICAL DEVELOPMENT

According to David Noble, one of the most trenchant critics of distance education and ICTs in education, ‘all discussion of distance education these days invariably turns into a discussion of technology’ (Noble, 2002: 1). Indeed, the history of distance education is inextricably linked with technological developments, which both facilitated the delivery of education and also stimulated a demand for courses. The development of reliable postal systems in the 1830s facilitated the development of correspondence courses (Rumble, 2001b). This was the phase characterised by Nipper as first generation distance education, utilising print and post as the primary means of transmission (Nipper, 1989). In Nipper’s typology, second-generation distance education emerged in the 1950s with the use of radio and television broadcasting to supplement printed materials. The third generation was ushered in with the establishment of the UK Open University in 1969 with its multimedia approach, utilising a mix of text, broadcasts, video and tape recordings and some computer based materials. The more recent introduction of Internet technologies, involving virtual and online education in the 1990s is seen as the fourth generation of distance education technology which is likely to introduce far-reaching consequences both for distance education and for face-to-face education (Rumble, 2001b). In similar terms to Nipper, Farnes identified four stages of development of both conventional and distance education: pre-industrial; industrial pre-fordist; fordist; and post-fordist. The characteristics of these stages are summarised in Table 2.1 (Farnes, 1993).

**Table 2.1 Modes Of Production And Stages Of Conventional And Distance Education Development**

Mode of production	Conventional education	Distance Education
1. Pre-industrial	Craft model/Oxbridge tutorial/apprenticeships	Pre distance education independent learning from books
2. Industrial, pre-fordist	Mass elementary, expansion of secondary education	1 <sup>st</sup> generation single media DE
3. Fordist	Mass secondary, expansion of further and higher education	2 <sup>nd</sup> generation multi media DE
4. Post-fordist	Mass higher education and continuing education – mixed modes	3 <sup>rd</sup> generation computer based ODE networks

Source: (Farnes, 1993)

Rumble traces the growing acceptance of distance education in the thirty years from 1971 (Rumble, 2001b). In 1970 the Council of Europe was promoting correspondence education, as a means of expanding educational provision while containing expenditure (Wedell, 1970). The IRDAC report of 1990 on *Skills Shortages in Europe* was an example of the growing appreciation of the ‘new role of distance education in modern society’ (Ljosa, 1991:2). According to Ljosa,

Distance education is no longer looked upon as a vehicle for repairing some shortcomings of the education system at a particular stage of development. It is now conceived of as a regular and necessary element of the educational system (Ljosa, 1991: 2).

As this thesis will demonstrate, the EU formally adopted open distance learning as a key element in its education policies in the early 1990s, when the Treaty of Maastricht included a commitment to encouraging the development of distance education (1992). By 2000, the term elearning had replaced ODL in EU terminology. A series of documents emerged from the European Commission which promoted elearning as the vehicle to radically reform the entire education and training system to cope with the demands of the new knowledge society (CEC, 2000c; CEC, 2002a). Speaking of the EU's policies on elearning, the Commissioner for Education and Culture, Viviane Reding encapsulated the new official enthusiasm:

Internet and new technologies are miracles of knowledge and information and will offer tremendous potential for growth as well as for cohesion. New technologies can, for instance, offer entirely new ways of learning and studying and can potentially help us to combat some of the problems in our education systems... (Reding, 2001).

However, despite EU enthusiasm and Weimer's (1992: 392) claim that 'we seem to have adopted distance learning as an all purpose solution' distance education has had a long struggle to become accepted as a legitimate form of education. Even the Council of Europe, while promoting the inclusion of correspondence education as an element in educational planning, recognised the need to increase esteem for this form of education (Wedell, 1970: 88). According to Rumble 'The distance teaching universities all faced scepticism and an element of scorn and ridicule when they were established' (Rumble, 1983: 9). Distance education has been greeted with deep suspicion arising from concerns not only about quality but also its potential to undermine more traditional forms of education through the industrialised approach which particularly characterises large scale open universities (Peters, 1993; Rumble, 2001b). Jarvis had a particularly jaundiced view of distance education as

a product of the impersonal technological society of the industrial period; indeed it is very much a sign of the twentieth century with its individuated man ... distance education is a 'functional fit' to contemporary technological society ... decline in the *gemeinschaft* type society was a necessary prerequisite for its emergence (Jarvis, 1985: 159, 161).

A number of writers have expressed concerns about the adoption of post-fordist modes of production in current distance education and the consequences for access and equity for those on the periphery (Evans and Nation, 1992; Farnes, 1993). Evans and Nation found that post-fordism was transforming distance education, but not in a positive way, regarding 'instructional industrialism as a hindrance to theoretical progress in open distance education' (Evans and Nation, 1992: 10). Wood found the Open University conception and generation of knowledge to be hierarchical and

I believe inimical to what we think of as university study and discourse...internal critiques of the OU system have been generally conducted at the empirical level of educational technology which legitimises the system as a problem of techniques whereas I wish to demonstrate that it is also a problematic of knowledge and indeed of power (Wood, 1985: 127).

More recently, Noble criticises distance education in the US for its focus on profit, leading to commoditisation of higher education, with the invariable result not only a 'degraded labor force but a degraded product' (Noble, 2002: 4). In the *Digital Diploma Mills* series, Noble (1997; 1998a; 1998b; 1999; 2001) wrote of the somewhat ineffective attempts of US institutions to jump on the profitable bandwagon of correspondence education in the early part of the twentieth century. They withdrew when it became obvious that the only way to make profits was to produce poor quality education, leading to massive drop out. He drew



parallels between that period and more recent attempts by universities, once more attracted by the profit motive to 'peddle online education'. Noble, on the basis of his analysis of the history of US failures in university level correspondence education, warns that today's

proponents of distance education believe they are leading a revolution which will transform the educational landscape. Fixated on technology and the future they are unencumbered by the sober lessons of this cautionary tale [i.e. previous failed attempts] or by any understanding of the history they are so busy repeating (Noble, 1999: 11).

However, Noble himself appears unencumbered by an appreciation of geography, failing to provide a more balanced view which would recognise the undoubted successes of distance education in Europe, Australia and other parts of the world which is largely dominated by public sector, non-profit institutions and which have, for the most part, at least up to recent times, been more motivated by the desire to extend access and widen participation than to produce profits.

In reviewing the history of distance education, what is clear is the way in which as Noble pointed out, technology has come to dominate any discussion of distance education. The next section will discuss the arguments which have been used to promote the use of information and communications technologies (ICTs) in distance education.

### **2.2.3 THE TECHNOLOGICAL IMPERATIVE**

Over the years, enthusiasts have predicted that various technologies will radically transform education, only to be proved wrong. ICTs are only the most recent in a long line of such technologies. Bauer reminds us of the 'innovation amnesia trap'; radio broadcasting in 1920s, and television in 1950s 'were also perceived as similarly beneficial technologies' (Bauer, 2001: 145). Since the 1970s a largely uncritical consensus appears to have developed among policy makers and researchers about the benefits of technology in education. In 1979, Stonier predicted that the 'use of electronic facilities in the student's own home represents one of the major patterns for future community-based education' (Stonier, 1979: 41). The Web-Based Education Commission in the USA in its report *The Power of the Internet for Learning* refers to the 'awe-inspiring power of the internet' to transform the educational experience and to meet the educational challenges of the information age (Web-Based Education Commission, 2000: 1). Despite admitting to the 'blatant omission' of elearning from his analysis of the impact of the Internet on social and economic life, Castells nevertheless comments that the 'economy requires the development of e-learning as a durable companion of professional life' (Castells, 2001: 91).

International agencies such as UNESCO, the OECD, the World Bank, the Council of Europe, and the EU have played an important role in promoting technology in education. UNESCO, in particular has played a major pioneering role in harnessing new technologies for formal and non-formal education for many years: for example, it supported the production of the first educational radio programmes in Colombia as early as 1949 (UNESCO, 1999). It has focused international cooperation on pedagogical and methodological issues arising from the application of the new technologies; it has instigated studies and research projects on the economic, administrative, and legal implications; carried out feasibility studies on radio, television and satellite broadcasting, and supported training institutes in Latin America (UNESCO, 1999). In his foreword to a UNESCO document on trends and policies in open distance learning, the Assistant Director General for Education, and former Vice-Chancellor of the UK Open University, Sir John Daniel counsels that as Member States and governments

become more aware of the potential of open and distance learning, it is essential for their educational planning that the opportunities offered by new technologies be realistically

examined within the framework of national development plans in general and educational policies in particular (Moore and Tait, 2002: 3).

The OECD has carried out studies on the impact of information and communications technologies on post-secondary education (e.g. OECD, 1994). The World Bank has established a distance learning division and is active in delivering training to officials in a wide range of government organisations in the developing world, through a network of high technology distance learning centres linked together with videoconferencing (Foley, 2003; World Bank Institute, 1999). The Council of Europe initiated a study in 1999 on Lifelong Learning which considered ways in which the new ICTs can contribute to equity and social cohesion (Council of Europe, 2002).

The EU has developed a range of policies supporting the Information Society, Lifelong Learning, and Open and Distance Learning. The communication 'eEurope: an information society for all' outlines a political initiative to ensure that citizens of the European Union can fully benefit from the Information Society (CEC, 2000b; CEC, 2002a). The key objectives of this initiative are: every citizen, home, school, business and administration will be brought online; a digitally literate Europe will be created, supported by an entrepreneurial culture; and the whole process is to be socially inclusive, building consumer trust and strengthening social cohesion. The memorandum on elearning 'Designing Tomorrow's Education'

seeks to mobilise the educational and cultural communities, as well as the economic and social players in Europe, in order to speed up changes in the education and training systems for Europe's move to a knowledge based society (CEC, 2000a).

It may be useful to consider where the conviction that the new technologies must be introduced in education has come from. Rapid developments in technology, involving the convergence of telecommunications, computers and microelectronics, and the emergence of the Internet, have meant that many skills and jobs are obsolete, while at the same time, there is an increasing demand for new skills to manage and cope with the new technologies. According to Green a new international policy discourse around lifelong learning and the 'learning society' has emerged from the recognition of the need for continuing education and training to ensure employability (Green, 1999: 59-60). This discourse envisages learning as a permanent process throughout the life cycle, which will occur, not just in conventional educational institutions, but also in the home, the workplace, school, and community. New paradigms of education and training using the new technologies are linked with the process of globalisation according to Clegg et al: 'Within education the passive acceptance of globalisation paradigms engenders a deterministic view about the role and function of technology as a phenomena [sic] with its own independent trajectory' (Clegg, et al., 2003: 43). Reviewing the 'Greenwich Speech' given by British Minister for State for Education, David Blunkett they conclude 'The simple link from globalisation through technology to pedagogy and a skilled workforce envisaged by David Blunkett belies a more complex reality on the ground.' (Clegg, et al., 2003: 51).

Nevertheless, there are convincing rationales for introducing and utilising technology in education. Hawkrige et al (1990) identified four principal rationales for introducing technology in education. Firstly, the social rationale includes recognition of the role which technology now plays in society, the need for education to reflect the concerns of society, and the need to demystify technology for students. Secondly, the vocational rationale requires the system to prepare students for jobs which require skills in technology. Thirdly, the pedagogical rationale proposes that technology will improve the teaching and learning process through better communications, higher quality materials, and enhance teaching of traditional subjects in the curriculum. Finally, and perhaps more controversially, Hawkrige

et al suggest that the use of technology can have a catalytic effect, not only on education but on society as a whole, through improving performance, teaching, administration and management, increasing effectiveness, making a positive impact on the education system as a whole, altering the power relationships between teachers and learners, and providing skills for disadvantaged communities which can be used for liberating and transformational purposes. Bates, in a more recent attempt to identify the drivers for new technologies in education, listed six rationales which overlap somewhat with Hawkridge et al's typology: to provide information technology skills; the need to respond to the technological imperative; widening access and increasing flexibility; reducing costs; improving the cost-effectiveness of education; and improving the quality of teaching (Bates, 2000).

Holmberg sees two-way communication as at the heart of distance education, whether through correspondence or other technology; thus, technology is merely to be welcomed where it speeds up communication (Holmberg, 1991). Nevertheless, while the importance of pedagogy is ritually referred to, technological considerations have tended to dominate the debate (Oh, 2003: 135). As Rekkedal comments:

all parties seem to claim pedagogy to be more important than technology... on the other hand with some exceptions funding agencies and many research projects seem to focus more on new technology and media as such than on learning and teaching theory and methodology when trying to solve educational challenges in new ways (Rekkedal, 1993: 32).

Despite the potential of new technologies for improving pedagogy and societal change, most arguments for the use of ICTs in education concentrate on the social and vocational aspects. A further rationale which is often cited is the potential cost-effectiveness of ICTs in education, although this is a hotly contested view (Fox, 2002). While many supporters of the use of technology in education routinely list cost-effectiveness as one of the arguments for introducing technology, there is little convincing evidence that technology reduces costs. As early as 1982 a report commissioned by the European Commission on education and microprocessing concluded that 'At best the outlay on equipment can be traced, but the running costs can never be found with any precision' (cited in CEC, 1989: 37). Van den Brande suggested that telematic technologies have the potential to create a rich learning environment where the learner can build a truly international curriculum by 'pick and mix', however, she warns that

the cost of the infrastructure, organisation and management of such a system should however be balanced against pedagogical and economic benefits and outcomes. Only if a critical mass of providers jointly decides to establish and maintain such an infrastructure can the economy of scale be reached to make the infrastructure cost effective (Van den Brande, 1993a: 16).

As Feenberg notes 'distance learning is not going to be a cheap replacement for campuses. Some other solution to the parking problem will have to be found' (Feenberg, 1999).

The change in focus from distance education to elearning is of increasing concern in the literature; the task of open distance learning to extend equity and access is contrasted with the promotion of elearning as a 'technical fix' to prepare citizens for the information society, and promises of increasing cohesion are countered by unease about the impact of the digital divide where access to technology is determined by geography, social status, education, gender and age (Gray, 1999; MacKeogh, 2000; 2001b; Rumble, 2001a; Selwyn, et al., 2001). The traditional target group for distance education was those learners who could not participate in full-time face-to-face education because of geographical, domestic, work, or disability constraints. Many of the early publicly funded distance education institutions were

set up for social equity and equality reasons, to extend access to educational opportunities to disadvantaged groups. In contrast, elearning is widely promoted as a panacea for all learners both on-campus and off-campus with very little emphasis on redress of disadvantage (CEC, 2000c). The impact on distance education's traditional body of learners of the current emphasis on technology led approaches is a matter of concern for some educators (Dhanarajan, 2001; Rumble, 2001a). The next section will address the debate on technology, social cohesion and the digital divide.

## **2.2.4 TECHNOLOGY, SOCIAL COHESION AND THE DIGITAL DIVIDE**

Ljosa warns that 'every time we introduce a new technology in a distance education system we run the risk of introducing a new barrier to participation and learning' (Ljosa, 1992: 30). Even in 1986, Keegan pointed out that the choice of technology should be determined by its availability in student homes rather than in study centres or other locations (Keegan, 1986: 190). There are widespread concerns with the assumption that societal benefits will automatically flow from the Information Society. Simpson argues that

policy action must be taken in a number of crucial areas to ensure that its benefits will fall in sufficient quantity, and with relative equity, across the EU – to leave the evolution of the information society in Europe to the market alone is neither desirable nor appropriate (Simpson, 2000: 462).

A High Level Expert Group convened to advise the EU on the Information Society concluded that 'ICT is neither good nor bad...it is the way in which any technology is used which determines both the nature and extent of its benefits...these benefits do not accrue automatically to all sections of society' (CEC, 1997a). As early as 1989, UNESCO held an International Congress on 'Education and Informatics: Strengthening International Cooperation' in Paris which agreed that information technologies would be an effective instrument in improving education, but warned that unless there was a real sharing of resources 'educational disparities will grow and may never allow some countries to achieve a technological balance with regard to technological development' (Ferrante and Hayman, 1989:9). Gajaraj Dhanarajan, former Chief Executive of the Commonwealth of Learning, expressed the concerns of the thirty-four commonwealth countries as follows:

For the bigger as well as the smaller nations, travelling the technological highway promises to be full of opportunities but at the same time loaded with threats. The opportunities include increasing educational access quickly and even cheaply, tapping into global intellectual resources, improving the quality of the academic environment and putting the learner in control. Threats ... come in the form of competition from mature and sophisticated players when the field is not so level in so many aspects, the angst of academic staff at the perceived loss of academic freedom and autonomy; commoditisation of knowledge into another consumer product and a fear of yet another essential and necessary social service becoming a victim of globalisation and also higher costs (Dhanarajan, 1998: x).

In a more recent article Dhanarajan reiterates his misgivings about what he sees as a misplaced naïve faith in the new technologies to solve all of the problems of deprivation around the world (Dhanarajan, 2001: 64). The impact of technology is hampered by the challenges of access, skills, cost and lack of government capacity to provide infrastructure. Furthermore, he concludes that

driven by the desire to touch that last person in the queue distance educators in the past went to extraordinary lengths to ensure equity issues were at the center of debate. I do not see that debate any longer (Dhanarajan, 2001: 66).

This concern echoes that expressed by SCIENTER (an Italian based ODL research institution) that in the past ODL was seen in the context of extending access to the disadvantaged, now it is seen almost solely in the context of the use of new technologies (SCIENTER, 1997: 32). SCIENTER considers that the tendency of policy makers to conflate ODL with ICTs leads to the risk of losing innovation in social and pedagogical terms. The impact of the use of ICTs in education has been to create a convergence between ODL and the conventional system. However, paradoxically this is leading potentially to an increase in the numbers excluded from participation through lack of access to the required technologies. Thus, there are fears that the effect of EU policies may be to increase the problem of exclusion, rather than alleviating it. The European Council of Ministers alluded to this problem in its discussion of the White Paper on Teaching and Learning in 1996.

Paradoxically the development of scientific research and the dissemination of technology risk widening the gap between those who have knowledge and control its use and those who may not possess the new literacy...the real challenge for educational systems is to create conditions under which everyone can be offered appropriate education and training opportunities with lifelong learning in view...<sup>3</sup>

Most countries have, in recent years, responded to the demands of the Information Society by putting in place a range of initiatives designed to modernise the IT infrastructure and to tackle disparities in access (MacKeogh, 2001b). This thesis will examine the question of the digital divide in Europe and will address the types of policies and strategies adopted by Member States of the European union to create conditions conducive to adoption of the ICTs in education, in compliance with EU policy directives.

The next section will review the current state of research in open distance learning.

### **2.2.5 RESEARCHING OPEN AND DISTANCE LEARNING**

Concern with the quality of research in distance education has been a recurring theme in the literature since the 1960s, with many writers criticising the field as atheoretical and descriptive (Garrison, 2000; McIsaac and Gunawardena, 1996; Moore, 1985; Nichols, 2003; Perraton, 2000; Saba, 2000). Criticisms have focused on both research methods and approaches as well as the dearth of research on specific topics. Moore summarised the condition of distance education research in 1985 as:

what might be expected in the growth of a new field in education - only a handful of good projects, a massive volume of amateur, unsystematic and badly designed research producing information of very little general value, vast quantities of information on hundreds of thousands of students...with data that rarely answer any question derived from or contributing to theory ... [the] field is characterised by naive empiricism (Moore, 1985; Moore, 1995: 36).

Coldeway identified the failings of research publications which included: distance education position papers which made little attempt to define terms and variables; descriptions of practice at particular institutions; general research reports based on broad and loosely defined variables which were impossible to replicate; more precisely defined research reports, which were rarely replicated; and research applied to distance learning although not conducted with this application in mind (Coldeway, 1982). He suggested that 'the careful manipulation of variables and the clear analysis of well gathered data are still rare. There is much to be learned about research into distance learning and still more about distance learning itself.' concluding 'Rather than being designed within a particular theoretical framework, most

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<sup>3</sup> Council of Ministers 1996 Press Release No 6802/96 <http://ue.eu.int/Newsroom/>



research on distance learning attempts to find solutions to perceived problems' (Coldeway, 1982: 35).

Holmberg (quoted in Evans, 1991: X) optimistically stated that there was now [i.e. in 1989] 'a wealth of literature on distance education...I feel the subject is now ripe for a summarising presentation of theory and practice'. However, that summarising presentation has still not arrived. Instead, writers have continued to criticise the current state of research and present their own shopping list of topics which they consider should be the focus of research in the field. Rubin criticised the lack of critical research, stating that there is more interest in 'doing it [i.e. distance education] or learning how to do it or talking about doing it'. His criticisms of the field include the primarily descriptive nature of articles in journals, with little systematic exploration of critical variables and he concludes that the state of distance education research had not improved since Coldeway and Calvert expressed their concerns (Rubin, 1992: 1). Rekkedal, reviewing research on distance education in Norway commented on the concentration on empirical studies, rather than on theoretical development (Rekkedal, 1993). Almost twenty years after Coldeway's identification of the failings of distance education research, Garrison found little had changed, concluding that 'distance education is theoretically challenged to provide insightful frameworks that will guide us in what is, most assuredly, a new era of distance education' (Garrison, 2000).

In a review of distance education research in the 1990s, Berge and Mrozowski (2001) surveyed 870 journal articles and dissertations and found that the majority focused on descriptive research: 74.83% of the articles and dissertation abstracts were based on descriptive research, compared with 12.58% case studies, 6.63% correlational research, and 5.96% on experimental research. They summarised the main criticisms of the quality of distance education research as: 1) non-control for extraneous variables; 2) lack of randomly selected subjects; 3) lack of validity and reliability of the instruments used to measure student outcomes; 4) inadequate control for the feelings and attitudes of students and faculty (Berge and Mrozowski, 2001). Such criticisms are not universally accepted. Graham Gibbs, editor of *Open Learning*, one of the journals criticised by Berge and Mrozowski, takes issue with the validity of their findings. They 'adopt a reductionist quantitative research paradigm, in which studies measure what is easy to measure, and which have rather more difficulty coming to terms with the big messy picture.' (Gibbs, 2002: 101). He suggests that the

overwhelming dominance of quantitative reductionist research into conventional higher education in the US...is not reflected in its impact. In contrast the much smaller number of conceptual frameworks derived from insightful 'descriptive' (e.g. ethnographic or phenomenological) studies...have had a lasting and deep impact. By all means let's have more, and more convincing, evidence of effectiveness, but let's also make sure these data are set within powerful explanatory frameworks rather than assuming that data are inherently valuable simply because they are collected within a particular methodological paradigm (Gibbs, 2002: 101-2).

The methodology adopted for this thesis will be discussed in further detail in Chapter 3. As will be seen, a case study approach has been adopted, which combines both qualitative and quantitative methods to investigate EU policy-making in distance education.

A number of writers have sought to specify the topics which have been, as well as which should be, on the distance education research agenda. These topics may be categorised into: research on students (characteristics; achievements; attitudes; learning styles; support; persistence; impact of studies; access to technology); teachers (roles; characteristics; training); pedagogy (technology and other media; teaching theories and methods; instructional design; assessment; autonomy and interaction); organisation and management

(marketing; completion rates; economics and cost-effectiveness; forms of cooperation and collaboration; evaluation); comparisons with other forms of education; and policy (contribution to social and economic policy at institutional, national and international level). Berge and Mrozowski refer to the dearth of research on policy and management issues, commenting that this 'reflects the field's focus on issues within the classroom and between the distance learner and the instructor' (Berge and Mrozowski, 2001: 14). Evans and King, writing from an Australian perspective have pointed to the need for distance educators 'to adopt sustained critical analysis of government policies and their outcomes in practice' (Evans and King, 1991b: 5). According to these writers

distance education and education more generally contain and reflect the contradictions and contestations which are the essence of contemporary societies...the practices, structures and institutions of distance education are not mere unproblematic educational responses to societal needs but rather locales of human and political interaction and contest... [where] government, bureaucracies and individuals wrestle to establish their interests in distance education (Evans and King, 1991b: 4).

Similarly, Jakupiec and Nicoll (also in the Australian context) state that distance education researchers have paid little attention to governmental policy, explaining that distance education research is 'over occupied with procedures, processes, techniques and technology and therefore not inclined to question the social or political aims and values of distance education...' (Jakupiec and Nicoll, 1994: 182). They argue that policy research analysis should be incorporated into the distance education research agenda so that by analysing the impact of policy and the values implicit in policy statements researchers participate in the discourse over the legitimacy or otherwise of policy affecting distance education (Jakupiec and Nicoll, 1994: 188). Distinguishing between empirically based analysis, interpretatively based analysis, applied policy analysis, and curiosity driven policy analysis, they argue that remaining at the level of empirical descriptions would be to allow others to formulate the meaning of distance education (Jakupiec and Nicoll, 1994: 192).

It is this dearth of research in the area of policy and distance education which has led this thesis to focus on policy in ODL. As the previous sections have demonstrated, distance education has been adopted as a key policy area by the EU, yet, very little sustained analysis of the process and implementation of EU policy-making in this area has been carried out.<sup>4</sup> One of the aims of this thesis is to contribute to the research on EU policy and ODL. The next section will explore approaches to researching EU policy development and implementation.

## **2.3 EU POLICY DEVELOPMENT AND IMPLEMENTATION**

### **2.3.1 WHY RESEARCH EU POLICY ON ODL?**

As discussed in the previous section, research on policy has not been a major focus of distance education research to date, although research on education policy in the Irish context has also been, in the past, somewhat limited (Mulcahy and O'Sullivan, 1989). The relative lack of research in this area may be because in Gibb's term, policy is part of the 'big messy picture' which is difficult to analyse (Gibbs, 2002). The difficulties of studying the 'big messy picture' are aptly described by Harris (former adviser to two Ministers of Education in Ireland) as:

It is difficult to give any comprehensive overview of the role of the Department of Education in policy-making. Things do not remain constant for long and patterns do

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<sup>4</sup> The author has to date found only one Master's thesis on EU ODL policy, written in 1995 (see Tait, 1995).

not necessarily repeat themselves. The influence of particular individuals either politicians or civil servants may prove crucial at any time. Pressure from outside groups, if well orchestrated politically - may also force change (Harris, 1989: 20).

While Harris is describing the Irish context this constitutes an insightful picture of policy-making in the wider context.

There is widespread acceptance of the need for research in educational policy-making at both national and international level, not only to help to inform policy makers, but also to shape and evaluate these policies. The Society for Research in Higher Education has expressed concerns that at a time when factors such as 'the explosion in IT and its educational implications, the increasingly diversified student body and the multiplexity of the knowledge base' are creating a complex environment for policy-making, that there is a lack of information based materials for policy guidance which are aimed directly at policy makers (SRHE, 2002). However, the efficacy of research results in influencing educational policy is complex and not always as straightforward as researchers might expect (Kirst, 2000; Stronach and MacLure, 1997). Miller and Fredericks, analysing how the 'is' of research becomes the 'ought' of policy ask why research findings are 'generally, so overwhelmingly ineffective in social policy formulation' (Miller and Fredericks, 2000). They argue that social policy makers act as gatekeepers where they

must attempt to appropriate, translate, and filter social science research findings to relevant publics; however, the very act of doing so is most likely doomed to fail. Those who are then to 'benefit' from the social policies, informed and enlightened by social science findings are the ones whose voice often cannot be heard (Miller and Fredericks, 2000).

They point out that ideological commitments or preferences can often work as a 'biasing filter' in explaining how 'social policies are formulated, implemented and evaluated given social research findings' (Miller and Fredericks, 2000). The need for independence from the promoters of particular policies is referred to by Edwards et al who argue that difficulties arise in research that charts the formulation of particular policies, monitors their implementation and evaluates their impact within terms of reference defined by their promoters as this may overlook how policies articulate with others to form the 'big picture' (Edwards, et al., 1992).

The primary objective of this thesis is to examine ODL policy in the arena of the EU. This is driven by a number of reasons, not least the fact that the EU explicitly adopted a commitment to 'encourage the development of distance education' in Article 126 of the Maastricht Treaty on European Union (1992). At the very least, the degree to which this commitment has been met requires evaluation. This quote from Jacky Brine (1995) may serve to illustrate the relevance to researchers of analysing EU educational policies:

One of the difficulties in focusing on European policy documents is that they can seem impersonal and divorced from everyday life, from teaching, learning and earning a living. And yet my interest in European policy is precisely because of its impact in these and many other areas of our lives. My main interest in focusing on European educational, vocational and social policy documents during this early formative period of the EU is because we are witnesses to, even participants in, its construction (Brine, 1995: 145).

Sultana (1995) surveyed the literature between 1985 and 1995 in the course of preparing a review of education policy as part of the Maltese application for admission to the EU and found remarkably few soundly based research articles. Of the 100 refereed articles on the theme of education and the EU he analysed, he describes most as



bland comparative pieces, short of sociological imagination, highlighting similarities/differences in educational systems of the Member States... most of the literature is marked by uncritical acceptance of the goals and processes of European unification and an approbation of the presumed implications of this for educational practices (Sultana, 1995: 115).

From extensive searches of the research literature on open distance learning policies, the state of research reflects that described by Sultana for education in general. Nevertheless, the level of interest in theorising EU policy in education among educational and social researchers has increased in recent years (see for example Brine, 1995; 1998; 2000; Demeulemeester and Rochat, 2001; Ertl, 2003; Field, 2002a; Hingel, 2001; Neave, 1994; Phillips and Economou, 1999; Rakic, 2001). The key questions which have been asked about policy, and which form the basis of this thesis are: What are the policies and why have they been developed? Who is responsible for making the policies? How are the policies implemented? How do the targets of these policies respond? As will be seen, the question of how the policies are seen by the target groups is rarely asked. The next section will provide a brief overview of research on the role of the EU in educational policy-making since the Treaty of Rome in 1957.

### 2.3.2 EUROPEAN UNION POLICY ON EDUCATION

As Chapter 4 will discuss, education was not originally regarded as being within the remit of the EU, yet the founding father of the EU, Jean Monnet is reported to have stated that if he were starting again, he would start with education<sup>5</sup> (Sultana, 1995: 127). Laffan notes the 'renewed salience of the EU for European and global order has led to a burgeoning literature which attempts to capture the dynamic and multifaceted dimensions of this much studied regime change' (Laffan, 1998: 237). However, up to the mid 1990s, education policy was not a major concern of scholars of the European integration process; for example, Laffan devotes just two pages to education policy in her 1992 book on *Integration and cooperation in Europe* (Laffan, 1992). European Studies researchers tended to focus on policy areas involving major expenditure, or legislation, while education was often given just a brief mention in the context of European social policy (Laffan, 1992). This is because education is seen as firstly being restricted to the national policy arena because of the principle of subsidiarity<sup>6</sup>, and (in the past) being of relatively minor importance in the overall social policy arena. Nevertheless, the appearance of education on the EU policy agenda in the 1990s has stimulated interest from a number of researchers who have examined the policy-making process from a political science perspective (Blitz, 1998; Corbett, 2002; Katsirea, 2001; Nihoul, 1999). However, among educational researchers, the level of sustained and in-depth research on EU policy-making has been relatively limited to descriptions of EU implementation programmes, albeit with some investigations of the policy process (e.g. Field, 1998; Sultana, 1995; Tait, 1996).

As has been noted, while the Maastricht Treaty expanded the legal basis for EU involvement in educational policy-making, this power is limited by the concept of subsidiarity. Each Member State sees its education system as an expression of its culture, identity, traditions and history. While the Treaty of Rome allowed for mutual recognition of qualifications to facilitate mobility of workers in the Community, attempts to harmonise curricula have tended

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<sup>5</sup> This statement is widely quoted in the literature, however, in common with other writers who have quoted the phrase, I have been unable to locate the exact reference to where Monnet actually said this.

<sup>6</sup> Subsidiarity is the 'principle that decisions should be taken at the lowest level consistent with effective action within a political system' (Bainbridge, 2002). Article 3b of the Maastricht Treaty restricts the EU to taking action 'only if and in so far as the objectives of the proposed action cannot be sufficiently achieved by the Member States and can therefore, by reason of scale of effects of the proposed action be better achieved by the Community. Any action of the Community shall not go beyond what is necessary to achieve the objectives of this Treaty.'

to meet with resistance. Seidel comments 'to internationalise courses by setting common standards would destroy the rich multiplicity which exists among the universities of Europe' (Seidel, 1991: 289). Proposals to introduce a common core curriculum in law across Europe were deemed neither feasible nor desirable due to financial constraints, the requirements of local professions and linguistic problems (Santinelli, 1992). Similarly, efforts to harmonise architectural training in the EU ran up against the different conceptions of the architect's role and responsibilities in the different jurisdictions (Button and Fleming, 1992). Nevertheless, recent developments, such as the Bologna declaration inspired restructuring of degree programmes into the 3+2 model, are heralding increasing convergence in some aspects of European education (Bologna Declaration, 1999).

Rakic (2001) has examined the evidence for convergence of higher education policies in Belgium, France and Germany and concludes that while the EU has had little *direct* influence, the countries in question are converging through the process of policy imitation. He considers that the EU is an integrating factor; Member States are aware that even if they are not directly coerced into a policy by the EU, major deviation from dominant trends will be detrimental to their country (Rakic, 2001). He finds it significant that the Bologna and Sorbonne declarations were 'bottom up' policies initiated by the Member States and institutions. This is an example of what he describes as the 'law of anticipated results' whereby 'Policy makers adjust their policies to the situation they anticipate, in this case, to a slow but steady process of Europeanization' (Rakic, 2001). In general, Neave supports the view that EU policies are resulting in convergence among national higher education policies (Neave, 1996).

Despite limits to the EU's power to create binding legislation in the educational arena some legal instruments have been used especially where education/training and employment issues intersect. So, for example, Member States have had to initiate legislation and other measures to allow for mobility of professions such as doctors, pharmacists, architects, or to ensure equal access to training for men and women. However, normally, policy is expressed in the form of what is called 'soft law', for example, council recommendations, memoranda, declarations, White Papers, and Green Papers with Member States required to report back to the Commission on progress in applying these policies; where policies are non-binding, the response may vary among Member States. Those documents relating to ODL policy will be analysed in some detail in Chapters 4, 5 and 6 of this thesis.

Despite Sultana's findings referred to above, some analysis of the EU role in education has been critical, especially because of its emphasis on the economic rather than the social role of education, although this is perhaps inevitable in view of the economic basis of the Union, and the limitations of the EU remit in national education systems. According to Brine (1998) the basis for EU policy in education is economic growth and social policy, focusing on equality, European unity, new technology, the impact of the single market, and the development of a flexible workforce. Tait (1996: 233) notes that European Union education policies are firmly set in the social control/industrial trainer model, which stresses the link between education, training and development. He also notes that the flexibility and adaptability of the new information and communication technologies (ICTs) mirror the attributes of post-fordist work patterns. Speaking from an adult education perspective, Field states that 'the EU's education and training programmes are designed to foster economic growth. Occasional rhetoric to one side, education for citizenship and personal development are marginal' (Field, 1994: 88). Still other commentators refer to the narrowing of perspectives inherent in the European dimension, which by focusing on what is European, thereby highlight what is not European (Sultana, 1995). Nevertheless, there are more positive views of the EU role in education. Becher has written about the attractions of European programmes

which open the eyes ... to the potentiality of working with like-minded colleagues in other countries... there is no denying the potency of Europe ... not merely as a territorial entity but as a symbolic concept ...it stood for the opening of a new intellectual and operational review, for a consequent reduction in parochial attitudes (Becher, 1996: 224).

Mazey (1998) has studied the development and decline of EU gender equality initiatives, noting that the emphasis is now on mainstreaming the gender dimension into other EU economic and social policies, on the grounds that equal opportunities are no longer a marginal issue. It would appear that ODL is now subject to the same process, with EU initiatives for ODL being superseded by similar assumptions of mainstreaming of innovative (i.e. technology based) approaches in all EU funded education and training programmes. The next section will investigate a possible framework for analysing the complex sequence of events, policies, and initiatives which characterise the history of EU policy-making in ODL.

### 2.3.3 THE POLICY-MAKING PROCESS – A FRAMEWORK FOR ANALYSIS

In common with distance education, the policy research community also grapples with the quality of research in the discipline and the search for a sound theoretical basis. Sabatier, the proponent of the advocacy coalition framework quotes Schlager's description of the policy field as characterised by

mountain islands of theoretical structure, intermingled with and occasionally attached together by foothills of shared methods and concepts, and empirical work, all of which is surrounded by oceans of descriptive work not attached to any mountain of theory (Sabatier, 1997: 2).

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 to 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, 1984; 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 (1984; 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, pollution) 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 often comes about through random events, or what Kingdon (1984; 1995) terms a focusing event, such as an external crisis, or a skilled policy entrepreneur emerges with a particular agenda to implement. Kingdon (1984; 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.

There has been some criticism of Kingdon's approach for its lack of theoretical rigour; Sabatier summarises the disadvantages as

- 1) It's unclear whether the dependent variable is the set of viable policy alternatives or the selection of an alternative; 2) the critical assumption of the independence of streams cannot be falsified because Kingdon never tells us how to identify which actors are in which streams; 3) the causal drivers are underspecified in part because there are no clear models of the individuals (except, perhaps for legislators) (Sabatier, 1997: 7).

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 2.2 below summarises the key aspects of the framework which will be adopted.

In this thesis, the process of setting the EU's agenda will be analysed in the context of Kingdon's agenda setting framework. In Chapters 4, 5 and 6 the focus will be on the problem, policy and politics streams, in an attempt to identify the policy window which opened to allow ODL to surface on the agenda. In addition, attention will be paid to the key policy formulation and decision stages. In Chapter 7, the focus will be on the main actors involved in bringing ODL on to the agenda. Chapter 8 will focus on the implementation of the EU policies. The next section will discuss a framework for analysing the actors involved in policy-making in the EU.

**Table 2.2 The EU Policy-Making Process: A Framework For Analysis**

Policy Stage	Actors	Processes
Stage I: Agenda Setting	<ul style="list-style-type: none"> <li>• Council Presidencies</li> <li>• European Parliament</li> <li>• Commission Officials</li> <li>• National Governments</li> <li>• EU Committees</li> <li>• Epistemic Communities</li> <li>• Policy entrepreneurs</li> <li>• Lobby/Interest groups</li> <li>• Networks</li> <li>• Advocacy coalitions</li> </ul>	<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)</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>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 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	<ul style="list-style-type: none"> <li>• EU Commission</li> <li>• EU Committees</li> <li>• Expert Groups</li> <li>• Policy entrepreneurs</li> <li>• Policy networks</li> </ul>	Lobbying; research; discussion documents; expert groups; consultation meetings
Stage 3: Policy decision	<ul style="list-style-type: none"> <li>• European Parliament</li> <li>• EU Council</li> <li>• National Governments</li> </ul>	Directives, regulations, legislation; treaties
Stage 4: Implementation	<ul style="list-style-type: none"> <li>• EU Commission</li> <li>• National Networks</li> <li>• Project participants</li> </ul>	Action programmes (e.g. Socrates); benchmarking processes

Source: after Kingdon (1984; 1995); Richardson (1996a) and others.

### 2.3.4 POLICY MAKERS IN THE EU

Who makes EU policy? Wallace comments that ‘figuring out how European policies are made has never been a straightforward task for either the practitioner or the commentator’ (Wallace, 1996: 5). In practice, policy-making involves a number of actors at different times and stages of the process and the role of actors has been the focus of much research in the political sciences (Baumgartner and Jones, 1991; Corbett, 2000; 2002; Daguerre, 2000; Haas, 1992; Kassim, 1994; Mintrom, 1997; Radaelli, 1999; Richardson, 2001; Sabatier, 1998; Zito, 2001). The major actors in EU policy-making fall into two groups. The first group includes actors who are part of the formal policy-making structure of the EU including: the European Council; Ministers of Education in the Member States; the European Parliament; the Education Committee; the Economic and Social Committee; the Committee of the Regions, the national governments; and the European Commission (in effect the civil service of the EU). The second group comprises a wide range of networks, organisations and individuals including: policy networks, lobbying groups, interest organisations, as well as individuals which interact with the EU, mainly through the Commission, but also by lobbying the

European Parliament and national representatives. Chapter 7 will analyse the role of both EU and non-EU actors in ODL policy-making.

#### **2.3.4.1 EU Level Actors**

At EU level, officials in the Commission, the Member States or Members of the European Parliament (MEPs) may spearhead an issue, for example, a European Parliament resolution on a European Open University is widely regarded as the catalyst for subsequent EU involvement in ODL policy-making (Ewing Report, 1987). Following an initiative suggested by the Irish presidency in 1990, an Expert Committee was established to advise the Task Force on Human Resources, Education Training and Youth, from which the Commission *Memorandum on Open Distance Learning* emerged in 1991 (CEC, 1991b). These initiatives culminated in the insertion of ODL in the Maastricht Treaty, and its inclusion as a specific action in the Socrates programme. The background to these developments will be discussed in detail in Chapter 5.

The EU policy-making process is complex, described by Laffan as:

non-hierarchical, heavily bargained and fragmented in different institutional settings. It is animated by a politics of pragmatism, the expert and the committee...the growing intensity of the Union's policy process and the mobilization of national and regional actors in the Brussels space takes national actors out of their member state containers and provides them with new strategic opportunities but also a more complex and diffuse political environment. The nested games within each state/society nexus are augmented by transnational connected games (Laffan, 1998: 242).

While in theory the Member States hold power, Laffan describes the EU as

gradually enmeshing the Member States in a web of collaboration and cooperation. The enmeshing of the national and the European has been neither smooth nor linear. Rather it has been partial, patchy and contested (Laffan, 1998: 243).

This process has particular resonance for EU educational policy-making where policies cannot be enforced through legislative means so that other strategies must be adopted in achieving the aims of the Commission and the EU.

Wendon notes that European Member States are reluctant to allow the EU to involve itself in social policy-making.

The legal base for social policy-making set out in the treaties is largely employment-related, with little authority granted to the Commission to develop initiatives that could directly impinge on areas of health and welfare policy such as health services, education, social services and housing (Wendon, 1998: 341).

Because of this, Wendon suggests that officials in the European Commission are required to adopt subtle tactics in reaching their objectives:

officials have realized that their position can be strengthened by being less responsible for policy formulation. They now know that they can succeed by stepping as far back into the background as possible and enabling others to deal with the detail. In a difficult period in EU social policy DGV<sup>7</sup> has found new roles in helping, funding, researching and nurturing – while staying well out of the firing line (Wendon, 1998: 350).

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<sup>7</sup> DGV was the Commission Directorate responsible for social policy.



Laffan comments on the role of EU institutions in socialising 'national actors to collective problem-solving, to channel ideas and to facilitate agreement on common programmes' (Laffan, 1998: 243). The EU has developed and nurtured transnational contacts and the establishment of networks as a means of promoting policy developments and placing issues on national agendas. The support of increasing contacts among institutions and students can lead to a diffusion of ideas about educational issues among members states, thereby facilitating the process of European integration (Laffan, 1992). Such transnational contacts can produce sweeping transformations in national systems, as demonstrated in Ó Buachalla's account of the influence of contacts with international organisations (e.g. the OECD conference of 1961) in initiating a major review of the Irish education system which laid the foundation for the transformation of the Irish educational landscape from the late 1960s onwards (Clancy, 1989; Ó Buachalla, 1988). The next sections will review the role of networks and non-governmental actors in developing and implementing EU educational policy.

#### **2.3.4.2 Non-EU Actors**

As the previous section has suggested, the EU relies on a wide range of actors in developing its policies. In addition to the EU institutions and Member States, the Commission consults with, or is lobbied by many organisations and individuals on all policy areas. As early as the 1950s, political scientists analysed the role of interest groups and networks in the formation and implementation of European policy (Haas, 1958). A number of theoretical frameworks have been developed by political scientists to analyse the role of these actors, including the policy network framework, epistemic communities, advocacy coalitions and policy entrepreneurs. These will be discussed below.

##### **2.3.4.2.1 Policy Networks**

Generally, policy networks comprise actors drawn from a range of sectors who interact to influence policy outcomes towards their own interests. In his investigation of the role of policy networks in education in Britain, Raab argues that policy network analysis has 'gained ground as a principal means of comprehending public policy processes across different fields and different countries' (Raab, 1994: 13). He states that 'policy implementation is not merely the execution of law and policy decisions but is itself a political process open to influence, games, bargaining and representation...civil servants negotiate policies with outside interests in a policy network' (Raab, 1992: 77). He goes on to comment that 'games of policy networks go on behind relatively closed doors through which only relatively few can enter; this is quite different from suppositions about open, accessible democratic processes. In addition their relative covertness makes them less amenable to research' (Raab, 1992: 74). He concludes by pointing to 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). He sees policy networks as part of the bottom up process of implementing policy (as opposed to top down implementation from governments) (Raab, 1994). However, he concludes that the study of policy networks is insufficient for explaining policy processes and outcomes (Raab, 1994). This thesis uses some of Raab's suggested methodologies in its attempt to render EU ODL policy intelligible.

Grande and Peschke studied the role of transnational organisations in EU science and technology policy and mapped the complexity of webs involving industry, science and politics but also found there were weaknesses in the model (Grande and Peschke, 1999). Daguerre, examining the evolution of public policy-making in the field of child care in England and France, found that '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). However, while policy networks affected the policy-making process at certain stages, at other stages, exogenous shocks or the influences of cultural traditions were more important in framing legislative reform in both countries. Nevertheless, despite the deficiencies of the policy network approach Daguerre concludes that 'all we need to do is recognize that models and metaphors have their uses in policy analysis and try not to claim that one model or metaphor can explain all' (Daguerre, 2000: 258). Radaelli supports this view, pointing out that 'policy change is often the result of exogenous shocks, but one should not underestimate how the interaction between actors can in itself produce policy change' (Radaelli, 1999: 768).

#### 2.3.4.2.2 Epistemic Communities

Radaelli in his study of the role of experts in EU policy-making points out that the EU relies on a 'plethora of working groups, standardisation bodies and committees of experts' (Radaelli, 1999: 758). He traces the origins of 'technocracy' in Monnet's early use of 'engrenage', involving networks of interest groups, trade unions and companies in making public policy (Radaelli, 1999). According to Radaelli, the role of expertise has

become the object of academic interest and passionate debate. Studies have shed light on how knowledge shapes public policy formation owing to the presence of experts and epistemic communities, fora of discussion and the policy entrepreneurship of the Commission (Radaelli, 1999: 758).

He states that expertise is important in EU affairs, expressing itself not only in technocracy but also in bureaucratic politics and epistemic communities (Radaelli, 1999). The concept of epistemic communities has been used as an analytical tool to describe and assess the role of expertise in EU policy formation and is seen as a fruitful way of evaluating the role of ideas in policy formation (Wallace and Wallace, 1996: 22). According to Wallace

In the early period of the EC this form of expertise was cultivated in the High Authority, and later the Commission, and in its choice of external interlocutors around the initial policy agenda. Indeed it can be argued that an epistemic community was also built around the concept of European integration as a policy model, which drew in alongside the more technocratic exponents of the method certain political and economic elites as well as more independent experts...versions of this phenomenon can be found in the subsequent history of the EC, especially in 'new' policy arenas, the environmental perhaps being the most amenable, as scientific knowledge and the specialized policy communities began to develop and find a response from European-level policy-makers (Wallace, 1996: 22).

While early theorists applied the epistemic community concept primarily to scientific communities, Peter Haas (1992) extended the concept to include other areas of expertise e.g. economists. Haas's interest in epistemic communities arose from a desire to find out in the policy process answers to the questions: who learns what, when, to whose benefit, and why (Radaelli, 1999). Haas's definition of an epistemic community is relatively complex, comprising:

a network of professionals from a variety of disciplines and backgrounds. They have (1) a shared set of *normative and principled beliefs*, which provide a value-based rationale for the social action of community members; (2) shared *causal beliefs*, which are derived from their analysis of practices leading or contributing to a central set of problems in their domain and which then serve as the basis for elucidating the multiple linkages between possible policy actions and desired outcomes; (3) shared *notions of validity* – that is, intersubjective, internally defined criteria for weighing and validating knowledge in the domain of their expertise; and (4) a *common policy enterprise* – that is, a set of common practices associated with a set of problems to which their professional competence is



directed, presumably out of the conviction that human welfare will be enhanced as a consequence (Haas, 1992: 3). [emphasis added]

According to Haas, to form an epistemic community it is not sufficient that members are all drawn from the same discipline or profession, although a sub group might form a community where they share principled normative and causal beliefs (Haas, 1992). In the context of international policy formation, epistemic communities are called on in times of issue uncertainty (e.g. monetary or macroeconomic issues), where consequences are only partly anticipated, and when there is a need for interpretation of issues based on the specific knowledge of the experts (Verdun, 1999). Epistemic communities exert influence in five ways: policy innovation; policy diffusion; policy selection; policy persistence and policy evolution as learning (Adler and Haas, 1992). Verdun summarises these stages as follows:

First by *policy innovation* they frame the issue, i.e. decide the nature of the issue, the policy objectives, and at what level (in which forum) the issue should be solved. These initial choices set the stage for defining national interests. Second, by *policy diffusion*, which refers to the mechanism with which members of the epistemic communities communicate using transnational links to make their views known. The acceptance of their ideas by others across the globe, in turn, can be used to put pressure on national governments. Third, *policy selection* can take place. In this case, decision-makers seek support from a selected epistemic community which they know will support their policies. This approach enables the decision-makers to legitimise their policy choices by referring to the community of experts who approve of their policy choices. Fourth, *policy persistence*, the continuation of consensus of ideas, beliefs and goals over time among the members of the epistemic communities, contributes to their credibility, and hence their authority, and thus it also determines how long an epistemic community remains influential. Finally, by *policy evaluation* as learning, epistemic communities can contribute decisively to the process of learning, which is important as the final understanding of a policy issue determines the policy outcome (Verdun, 1999: 314).

Richardson identifies three distinct roles of epistemic communities in the policy-making process (Richardson, 1996b). Firstly, within the decision-making process they provide a resource of knowledge and expertise at both agenda-setting and formation stage; secondly, in implementing policy decisions, epistemic communities sit on advisory committees and act as evaluators for research proposals (in this they still act in an advisory role, they are not decision makers); thirdly, they provide the Commission with an independent cross European expert forum to enable the Commission to 'maintain its position as an independent policy-making institution and to increase its leverage with the Council of Ministers and the European Parliament' (Richardson, 1996b: 15).

The epistemic community concept has been adopted by political and social scientists to analyse the European policy-making process in a range of areas (Brine, 2000; Daguerre, 2000; Radaelli, 1999; van Waarden and Drahos, 2002; Verdun, 1999; Zito, 2001). Verdun, analysing the introduction of the EMU (European Monetary Union), identified the Delors Committee which wrote the blueprint for EMU in the Treaty of Maastricht, as a classic epistemic community, comprising central bankers with a common project (Verdun, 1999). Van Waarden and Drahos identified an epistemic community of legal experts which was instrumental in the convergence of national competition policies towards a European Community norm (van Waarden and Drahos, 2002). The concept of epistemic communities has also been used to analyse agricultural policy-making in Canada and Australia (Coleman and Skogstad, 1995).

There is little evidence of the application of the epistemic community concept to education policy, although Brine discusses the construction of an epistemic community of social

researchers in the context of the Targeted Socio-economic Research (TSER) action in the EU Fourth Framework programme (Brine, 2000). She suggests that this epistemic community has 'been (and is being) tempted, and cajoled and pushed into place – both through the targeting of research proposals, and through the selection and incorporation of experts' (Brine, 2000). The Commission has been instrumental in the construction of this community in four ways: firstly by directing research in specific directions (she notes that there has been a shift in focus from the classroom to the labour market context of education); secondly, research findings are influencing policy development, which enables the Commission to legitimise policy decisions which have already been taken; thirdly, by acting as evaluators and selectors of projects, the 'epistemic community influences and legitimizes the funding of selected projects and the development of research policy' (Brine, 2000: 281). Fourthly through the Commission's emphasis on transversality, the emphasis is on the construction of multidisciplinary, international epistemic communities, including economists, sociologists, labour market theorists, educationalists and social psychologists. Brine speculates that these communities are largely pro-Europe and interested in the European project, especially since their recruitment is in the gift of the Commission. In the context of the TSER she concludes

while this common policy knowledge and European interest frequently surpasses national interests or obligations, the epistemic community...is nevertheless divided by theoretical and methodological disagreements and debates and ones related to disciplinary and national positionings (Brine, 2000).

While commentators have also pointed to the negative side of the technocracy where policy is shaped by experts and non-elected policy entrepreneurs the concept of epistemic communities has proved a powerful tool in analysing the process (Radaelli, 1999). Verdun suggests that the epistemic community concept offers an insight into the process of policy formulation before the decision making stage and it is more clearly defined than the alternative policy network concept (Verdun, 1999).

#### **2.3.4.2.3 Advocacy Coalitions**

There are disadvantages to applying the epistemic community concept because the rigidity of Haas's definition makes it difficult to find a community which meets all of the conditions (Verdun, 1999). An alternative perspective is provided by the concept of advocacy coalitions, defined as networks organised and united around a common set of normative and causal beliefs and attempting to control a policy arena or policy subsystem to enact their beliefs and principles (Sabatier, 1988b; Zito, 2001: 585). While both advocacy coalition and epistemic community frameworks focus on the role of knowledge in influencing policy changes, the advocacy coalition is a broader group, which may comprise politicians, interest groups, lobbyists and journalists, whereas epistemic communities tend to be dominated by expert professionals. In any policy domain, there may be a number of coalitions, competing with each other for dominance over the policy process and the advocacy coalition framework is regarded as useful in investigating the role of multiple coalitions (Verdun, 1999). Richardson concludes that no one model can explain the policy process, but that advocacy coalitions and epistemic communities 'appear to facilitate our understanding of a policy process which has to balance national and transnational interests and which no one set of players can dominate over time.' (Richardson, 1996b: 21).

#### **2.3.4.2.4 Policy Entrepreneurs**

A number of researchers have investigated the role of policy entrepreneurs in the policy formation process (Ball, 1998; Corbett, 2002; Kingdon, 1995; Mintrom, 1997; Zito, 2001). Policy entrepreneurs are described as individuals who are willing to invest their resources in pushing their pet proposals or problems, in coupling solutions to problems and coupling both problems and solutions to politics (Corbett, 2003b; Nihoul, 1999). Policy entrepreneurs must

have three characteristics: the right to a hearing because of their expertise or leadership position; political connections or negotiating skills; and persistence in developing and promoting their proposals over time until the appropriate opening in the 'policy window' [in Kingdon's terms] appears (Kingdon, 1995; Nihoul, 1999: 33). Their influence is often crucial at the agenda setting stage.

This thesis will investigate the role of actors in developing EU policy in ODL by applying a range of frameworks including policy networks, epistemic communities, advocacy coalitions and policy entrepreneurs. The results of this analysis will be discussed in Chapter 7. The next section will consider the research on policy implementation.

### 2.3.5 POLICY IMPLEMENTATION IN THE EU

Another focus of this thesis is on the implementation of EU policy in open distance learning. There is a large body of literature on policy implementation. As many note, the implementation stage does not presuppose successful adoption of the policy (Ó Buachalla, 1988; Pressman and Wildavsky, 1973). Knill (1998) suggests that success in policy implementation is affected by the characteristics of the policy; the policy content; the preferences, capabilities and resources of the administrative actors dealing with enforcement; and the societal actors addressed by the policy. Ó Buachalla comments 'The implementation stage as a component of the policy process cannot be assumed to follow automatically and successfully from the stages that precede it unless it is planned in detail' (Ó Buachalla, 1988). In their pioneering study of implementation titled *Implementation: How great expectations in Washington are dashed in Oakland or Why it's amazing that federal programmes work at all*, Pressman and Wildavsky identified one of the major obstacles to implementation of policies as formulated and authorised in Washington was the need to use agencies at local level which Washington did not control; the local agencies had their own priorities and values and so the policy as implemented was different to that which national legislators had intended. (Pressman and Wildavsky, 1973: 143). Shipman found a similar outcome in his study of ILEA open planned primary schools in the mid 1970s:

In practice, policy-making is neither rational nor linear. Objectives are rarely clear and there is always a dearth of evidence on which to plan...evaluations (of policy implementation)...often turn out to be tales of woe...usually due to lack of implementation or an unanticipated mode of operation in the programme that is being evaluated. These may bear little resemblance to the action intended because of the actions by those actually doing the job rather than those who make the policy (Shipman, 1985: 273).

According to Cram, the EU is constantly engaged in a process of 'purposeful opportunism' defined as 'the activities of an organisation which has a notion of its overall objectives and aims but is quite flexible as to the means of achieving them' (Cram, 1997: 154,187). She considers that its officials are adept strategists, able to marshal 'innocuous instruments' to achieve surprising results' (Cram, 1993). Given the weak legal basis for EU action in the social sphere, most approaches to implementation of EU educational policies have been through funding programmes although the Maastricht and Amsterdam Treaties gave more legal clout to operate in the educational area. As early as 1987 Daniel commented that

the glamour associated with international collaborative projects and the aid funds available may well make cooperation between countries easier to initiate than cooperation within a particular jurisdiction (Daniel, 1987: 32).

The main programmes through which the EU has attempted to implement its education and training policies are EUROTECNET; COMETT; ERASMUS; LINGUA; DELTA; TEMPUS;

EUROFORM; Research Framework programmes 1-6; Socrates and Leonardo da Vinci. There have been a number of evaluations of EU programmes, not all of them positive (e.g. Brine, 2000; CEC, 1998; CEC, 2001c; Ertl, 2003; Thompson and Ambler, 1990). Field has edited a book on EU programmes, comprising a series of articles on application procedures, managing partnerships, and the impact on participants of EU activities (Field, 2002b). According to Field

the EU's action programmes are relentlessly vocational, utilitarian and instrumental in their emphasis, sharing the tendency towards the 'technological option' which characterizes so many other EU policies and activities...Yet the Union has pursued the 'technological option' while emphasising through its symbolism, its attachment to the humanistic tradition of education.... This tension between instrumentalism and humanism has dogged the EU's human resources policies since their genesis (Field, 1998: 8).

McNamara has described similar tensions in the implementation of the VPTP programme (an EC funded programme focusing on the transition from education to adult working life) in Ireland in the late 1980s. He concluded that the programme was a failure due to what he terms the 'rhetoric/reality gap' (McNamara, 1991). He concludes

In this regard I must say that my ongoing research in the field of education/training developments in EC Member States suggest that the problem identified here is not uncommon...on the one hand we see the often impressive and ideologically loaded rhetoric of EC education/training youth policy documents acknowledged and deferred to...on the other failure to exploit...the experience of innovation (McNamara, 1991: 450).

If the rhetoric/reality gap is to be bridged, he argues, a clearer definition of where the power lies in terms of education and training decision making is essential, 'for in the last resort it is the granting or withholding of funding that will decide the nature of the programmes implemented' while acknowledging that this is delicate territory with all the problems of national sensitivities to consider (McNamara, 1991: 458). Chapter 8 of this thesis will focus on the implementation of EU ODL policies and will examine the extent to which these policies reveal a similar rhetoric/reality gap. In the next section, the response of actors to whom policies are addressed will be discussed.

### **2.3.6 RESPONSES TO EU POLICIES IN ODL**

There is increasing awareness of the importance of societal actors as a factor influencing the success of policies initiatives (Knill, 1998). Ozga states that there is a need to 'bring together structural macro-level analyses of education systems and politics and micro level investigation especially that which takes into account people's perceptions and experiences' (Ozga, 1990: 359). The Commissioner for the EU Directorate General Education and Culture, Viviane Reding commented that

In working towards the goal of lifelong training we must encourage dialogue with all players in vocational training. This European level dialogue must be intensified in order to ensure the necessary cooperation between the state, authorities at various levels, firms, social partners and training bodies (Reding, 2000: 4).

Interestingly, one group of key players in education is omitted from this list – students.

Laffan (1998) notes that the EU has developed a series of top-down policies designed to foster support for integration. However, she concludes that it is not clear how the top-down strategies will resonate with the people of Europe (Laffan, 1998). The rejection of some aspects of the EU policies by citizens, for example, the single currency, was a cause of great concern in the EU (Field, 1998: 187). The EU carries out a Eurobarometer survey each year,

tracking the responses of EU citizens to various aspects of the EU policies. A 1997 survey of young people aged 15-24 identified education in fourth place among the priority policy areas for EU action (cited in Nihoul, 1999). In 2003, following a series of policy statements on lifelong learning, some 18,227 interviews were carried out in EU countries, Iceland and Norway on citizens' views on lifelong learning. While the vast majority of respondents agreed on the importance of lifelong learning, just 12% mentioned that they would consider ODL approaches in updating or improving their qualifications. The report concluded that policy makers should

reflect carefully on the fact that few respondents mention open and distance learning channels or secondment and exchange abroad, considering the importance placed on new forms of learning and on mobility as a learning opportunity (CEDEFOP, 2003: 16).

Since these surveys are targeted at the overall population, rather than specifically at students or potential students, their relevance in specific policy areas is somewhat diluted.

Awareness of the role played by attitudinal factors in the successful adoption of technologies in education goes back many years. The authors of a report published in 1981 with the support of the Commission expressed the belief that:

the most important issue determining the satisfactory transition to the information society is psychological/behavioural. It is the attitude towards computing and information technology held by the general public and in particular by young people [which] will strongly affect people's responses to retraining opportunities (Barnett, et al., 1981: 152).

Over twenty years later, Clegg et al reiterated this belief that

The critical pedagogy approach re-focuses attention away from the functionality of e-learning environments back to the core relations between students and teachers and the conditions in which they find themselves and how shared technologies might enable them to change their circumstances. Any use of e-learning would therefore involve a negotiation in which the decision not to use technology is as valid as the decision to use it. For this type of learning to emerge, it is necessary to have ongoing dialogues with students, and ensure that they are able to shape their learning experiences in ways which are appropriate for them (Clegg, et al., 2003: 51).

Nevertheless, despite the rhetoric, there is little evidence of investigation of the role of students in forming or implementing educational policies. They rarely participate in the policy-making process, and at most their views are canvassed with regard to implementation. Part of the difficulty in capturing the student response is the ephemeral nature of student participation in the system. Kogan comments in relation to the UK National Union of Students that they 'cut across many of our interest group classifications. It [i.e. the NUS] is not part of the management system as, in a limited sense teachers are. It is both legitimised and, in the technical sense of the word, irresponsible' (Kogan, 1975: 211). The forces of globalisation and new technologies are creating the demand for new skills and the promotion of ICTs as the instrument for meeting the need for lifelong learning. However, introduction of the ICTs in the educational process is not just a technical, infrastructural issue. The preparedness of learners, in the widest sense, to use the new technologies is a key factor in the successful implementation of elearning strategies (MacKeogh, 2001a). Van den Branden and Lambert noted that there are culturally based differences in attitudes to use of technology in education, citing research which showed that there was a higher preference for studying with computers among students in Northern and Western Europe than from Southern, Central and Eastern countries (Van den Branden and Lambert, 1999). Bowser and Shepherd reporting on Australian research in 1990 concluded that 'while technology may, from a practitioner perspective, enhance the quality of the product, it does not necessarily do so for the



consumer' (Bowser and Shepherd, 1991). Oh, reporting on surveys of the attitudes to elearning of Korean students and the general adult Korean population found that while most respondents expected ICT to play a significant role in the future of education, nevertheless several real problems faced students, including the need for computer literacy, as well as lack of quality in the courses on offer (Oh, 2003: 134).

Research to date suggests that factors such as access to the technology, expertise in using the technology and general attitudes to societal factors are predictors of positive perceptions of ICTs in education (Carey, et al., 2002; MacKeogh, 2001a). However, while there is substantial literature on attitudes to ICTs in education, there is relatively little on responses to national and EU policies, especially in education. Therefore, this thesis seeks to establish the response of a group of students to EU policies in ODL and distance education, the results of which are discussed in Chapter 10.

## **2.4 CONCLUSION**

This chapter has reviewed the literature and research on open and distance learning and educational policy-making in the European Union. It should be noted that this review has been restricted to literature in English, and is thus subject to a certain anglo-centric bias although attempts have been made to include literature from non-English speaking countries, albeit based on translations. As this chapter has demonstrated, the quality of research in distance education has been a matter for concern for many years, with much criticism of the lack of theoretical frameworks, methodological rigour and restricted areas of study. One of the areas which have been identified as requiring study is that of policy on distance education. The status of distance education changed dramatically in the latter half of the twenty first century as evidenced by the commitment to 'encouraging the development of the distance education' in the Maastricht Treaty. No systematic analysis of this development has been carried out to date. Insights from the review of the literature on political, pedagogical, social and historical perspectives on distance education and policy-making have clarified six research questions designed to interrogate the development and implementation of EU policy on distance education. These are:

- How and why did ODL and elearning evolve as instruments of EU policy between 1957 and 2004?
- Who are, and were the actors, involved in the ODL and elearning policy development process and to what extent do insights from political science contribute to an understanding of their role?
- Is there a gap between the rhetoric and the reality of implementation of these policies?
- What are the consequences of the technological imperative for social cohesion – is there a digital divide in Europe, and if so, what is the response from Member States?
- How do distance education and elearning policies developed by the EU resonate with students?
- What is the cumulative impact of EU policies on ODL, or to what extent has EU policy encouraged the development of distance education in Europe?

In the light of the critiques of distance education research discussed in this chapter it is intended that the methodology adopted will meet the demand for a carefully designed research project, in a relatively under-researched area as far as distance education is concerned, utilising a range of qualitative and quantitative methodologies and based on solid theoretical foundations. This chapter has identified a number of theoretical frameworks for investigating these questions. It is intended to use Kingdon's policy streams approach in examining the course of EU policy development in ODL between 1957 and 2004 (Kingdon, 1995). The outcome of this analysis will be discussed in Chapters 4, 5 and 6. The role of



actors in the policy formation process will be examined in Chapter 7, using a number of concepts including policy networks, epistemic communities, advocacy coalitions and policy entrepreneurs. Chapter 8 will investigate the implementation of EU ODL policies. The role of the digital divide as a barrier to adoption of EU policies on elearning will be investigated in Chapter 9, together with an analysis of the responses of the Member States. The response of students to the EU's policies in distance education and elearning will be outlined in Chapter 10. Finally Chapter 11 will discuss the cumulative impact of EU policies on the field of distance education in Europe. The next chapter will discuss in more detail the methodology used in this research.

## **Chapter 3: Methodology**

### **3.1 INTRODUCTION**

This chapter describes the methodology used in researching the questions identified in Chapter 2, in addition to providing a justification for the methods selected. The first step in carrying out the research for this thesis was to conduct a wide ranging literature search covering the key themes: distance learning and the role of technology in education; policy formation in the European Union; and the role of actors and stakeholders in policy implementation. As Chapter 2 demonstrated, this review found a rich literature on policy formation and implementation in a wide range of areas, but comparatively little analysis of educational policy formation and virtually no detailed analysis of EU policy in open and distance learning (ODL).

From analysis of a range of studies of policy development and implementation, it appears that qualitative approaches involving documentary analyses, supplemented by interviews, predominate. Cresswell (1994) recommends implementing qualitative research paradigms for ill-structured problems in which the context is important, a theory base is not yet developed, and the nature of the study is exploratory. In addition, according to Finch, qualitative evaluation is 'likely to evaluate social policy from the perspectives of those who are its targets rather than those who make the policy. It reflects the view from below, not the perspective of the administrator and the policy maker' (Finch, 1986: 174). Indeed she suggests that quantitative evaluation is more likely to serve policy-maker interests, rather than challenge them (Finch, 1986: 74).

Of key interest to researchers is establishing the reliability and validity of results. Reliability refers to the consistency or accuracy of measurement and is most often the concern of quantitative research; whereas validity refers to judgements about 'whether you are measuring or explaining, what you claim to be measuring and explaining' (Mason, 1996: 146). Mason recommends the use of multiple methods or data sources to investigate a phenomenon, arguing that triangulation, using multiple methods can enhance the validity of research 'in the sense that it suggests that social phenomena are a little more than multi-dimensional' (Mason, 1996: 149). In view of the multi-layered nature of the topic of this thesis it was decided to adopt a mix of qualitative and quantitative methodologies as a means of examining the phenomenon of EU ODL policy from a number of angles. Thus, the thesis comprises a case study drawing on an in-depth analysis of primary and secondary sources, structured interviews with key actors, and a large-scale questionnaire survey among students, supplemented by insights gained through the author's own observation and experience of the policy process (Elliott, 1990).

### **3.2 PARTICIPANT OBSERVATION**

It is important to note that many of the insights in this thesis are drawn from the author's personal participation in and observations of the EU policy-process, validated through documentary analysis and interviews with key actors in the process. The author has been a lecturer in Oscail - the National Distance Education Centre, Dublin City University since 1987 and has been an observer and participant in key developments in ODL during that period. She has participated in a number of Expert Committees in the European Commission, the Organisation for Economic Cooperation and Development (OECD), and the Council of Europe on a range of issues relating to open and distance learning, technology in education,

and lifelong learning. She has also carried out analyses of the market for ODL in Ireland on behalf of the Commission and the Higher Education Authority (MacKeogh and Hogg, 1993; MacKeogh and Orbanova, 2002). She was responsible for coordinating the National Agency for the Socrates ODL action from 1995 to 2000, and has coordinated or participated in a number of implementation projects under EUROFORM, COMETT, ERASMUS, TEMPUS/PHARE, and Socrates ODL and Minerva. She has participated in ODL network meetings and conferences, and was Chair of the Humanities Academic Network of the European Association of Distance Teaching Universities (EADTU), and a member of the EADTU's Educational Research and Technology Network. Between 1988 and the time of writing, she has had the opportunity of observing the EU policy-making process in action, in particular the consultation process between Commission officials and expert committees and distance learning networks and has had access to documents and earlier drafts which are not in the public domain or which are difficult to access.

### 3.3 PRIMARY SOURCES

A distinction is often drawn between primary and secondary sources. Primary sources are 'original to the problem under study' (Cohen and Mannion, 1994: 50). For this thesis, extensive use was made of primary sources related to EU policy including reports, communications, recommendations, and agenda documents produced by the Commission; resolutions and reports produced by the European Parliament; and resolutions and decisions of the European Council. Other sources included opinions and reports of European Parliamentary committees, as well as the Economic and Social Committee (ECOSOC) and the Committee of the Regions (COR), whether published in the public domain or not. Some of these documents are published in the *Official Journal* of the European Union or the *European Union Bulletin*, whereas others are printed by the Official Publications Office in Luxembourg. Many documents are what might be termed 'grey literature' and are not widely available. For a number of years, the Commission published a compilation of European educational policy statements, which made these documents more accessible, however, this practice was stopped in the early 1990s. EU documents produced before 1995 which were required for this study were only available in printed or microfiche form and had to be sourced either from the European Documentation Centre in Trinity College Dublin, the Central Library in Brussels, the author's own records, or other archives. Fortunately, documents produced from 1995 are largely available on the Europa or Eur-Lex<sup>8</sup> websites although not always easy to find. The outcomes of this research form the basis of Chapters 4, 5, 6 and 7 of the thesis.

Saran who carried out research on educational policy in the UK defines an archive as

a document which is produced by an individual or institution in the normal course of life or work and which provides a record or part of the history of that individual or institution. Archives are mainly written documents, that is manuscripts or typescripts, but photographs and sound recording can also be classified as archives as can some printed material (Saran, 1985: 206).

Another source of documents was the archives of the European Association of Distance Teaching Universities (EADTU) in Heerlen, the Netherlands, and Oscail in Dublin City University, as well as the personal papers of Glyn Martin, the former president of SATURN, a now defunct ODL network; Chris van Seventer, former Secretary General of EADTU; and Coen de Vocht, former Secretary of EADTU and EU Commission official. The author has also compiled a personal archive of drafts of documents, minutes and agendas, project reports

<sup>8</sup> <http://europa.eu.int>; <http://www.eur-lex.eu.int/> a guide to accessing European Union publications and information may be obtained from the TCD European Documentation Centre <http://www.tcd.ie/Library/People/John.Goodwillie/EDC/Sources/internet.html>

and outputs, and databases of implementation projects arising from her involvement in EU policy-making and implementation programmes. These provided valuable insights for Chapters 7 and 8 on the role of the ODL networks in the development and implementation of ODL policy.

Sources for Chapter 9 on the digital divide and national ICT policies are largely drawn from national policy statements and survey reports on access to technology.

### **3.4 SECONDARY SOURCES**

A further source of data were secondary sources described as being 'made up of data which cannot be described as original' (Cohen and Mannion, 1994: 50). However, Tait points out that documents can be both primary and secondary depending on the context (Tait, 1995: 6). For example, EADTU or SATURN newsletters when describing EU policies may be seen as secondary sources, however, as commentaries on EU policies they may reveal contemporary attitudes to these policies and are thus in themselves primary sources for examining the role of the ODL networks in the area (Tait, 1995: 7). Conference proceedings can also provide valuable insights into current thinking and concerns of the day. This thesis draws on a wide range of secondary sources including articles, books and reports on EU policy-making, as well as general political science studies, in addition to books, conference proceedings, directories, and newsletters. A number of PhD theses on EU educational policy also proved helpful (Corbett, 2002; Katsirea, 2001; McNamara, 1991; Nihoul, 1999; Tait, 1995; Wickham, 1981). The Internet has provided an invaluable source of what might be termed 'grey literature' e.g. meeting reports, conference and discussion papers, as well as information on ODL networks.

### **3.5 DOCUMENTARY ANALYSIS**

According to Mason (1996: 71) 'The analysis of documentary sources is a major method of social research and one which many qualitative researchers see as meaningful and appropriate in the context of their research strategy'. Arguing from both an ontological and epistemological perspective, Mason suggests 'that written words, texts, documents, records, visual or spatial phenomena or aspects of social organisation, shape, form and so on, are meaningful constituents of the social world in themselves [the ontological position]...which according to the epistemological position 'can provide or count as evidence of these ontological properties' (Mason, 1996: 72 & 73). According to Scott

Textual analysis involves mediation between the frames of reference of the researcher and those who produced the text. The aim of this dialogue is to move within the 'hermeneutic circle' in which we comprehend a text by understanding that frame of reference from which it was produced, and appreciate that frame of reference by understanding the text. The researcher's own frame of reference becomes the springboard from which the circle is entered, and so the circle reaches back to encompass the dialogue between the researcher and the text (Scott, 1990: 32).

Mason cautions the researcher to have a good idea of what is being sought in using documents for qualitative research. 'It is little use spending six months reading documents and then deciding at the end of that what it is you were looking for' (Mason, 1996: 74). However, the researcher is also advised to have an open mind

perhaps the most important point for all those wishing to use primary source materials is that the reader should approach the material with an open mind in order to get the most from it...having read around the subject the next step is to see what the document tells you rather than look for individual theories to be proved. You may be surprised at your own conclusions (Saran, 1985: 210).

One of the main difficulties in analysing documents is to decide on a framework of analysis. Another important issue is integrating data deriving from the mix of methods used in this type of study. Taking Mason's dictum that 'ultimately what you choose to do will depend again on what you expect your categories to do for you, and what kind of explanatory logic you are going to apply in your data analysis' (Mason, 1998: 127), the author set out to read the plethora of documents with the following questions in mind:

When? This led to the creation of a year by year chronology of events including major EU milestones, educational policy decisions, policy decisions having an impact on education, major technological milestones, key dates in the development of ODL in Europe.

- Who? This identified the key figures involved in making EU ODL policy both in the Commission, European Parliament, National Governments and ODL institutions and networks.
- How? The chronology enabled the author to trace the various streams and events leading to the insertion of distance education in the Maastricht Treaty and its subsequent course of development, identifying the key junctures.
- Why? A key question was why did distance education become embedded in the Treaty of Maastricht and why did elearning become a cornerstone of policy in the late 1990s? It was important to identify the drivers of this policy and to identify evidence in the documents.
- Why not? Another issue to be examined was the barriers to implementation of EU policy in ODL.

Using this framework, it became possible to 'interrogate' the documents seeking answers to these questions. The insights which emerged from the documentary analysis then formed the basis of questions asked in the course of semi-structured interviews.

Mason also advises that diagrams and charts may be used as a tool, or aid to both cross-sectional and non cross-sectional forms of organisation, acting as an analytical tool to aid analytical thinking, potentially helpful in spotting relationships (Mason, 1996: 131). Where appropriate these have been used in this thesis.

### **3.6 INTERVIEWS**

As part of the validation process, it was necessary to carry out interviews with key actors in the Commission and in the ODL networks. A total of 26 interviews were carried out between February 2001 and July 2004. With regard to interviewing policy makers, Saran quotes Klein's view that such interviews are an unreliable method for establishing what happened, however, Saran's view is that interviews are crucial for testing hunches and hypotheses as well as entering into the atmosphere of policy makers (Saran, 1985: 226). She notes the importance of using unstructured interviews which at the same time are under the firm control of the researcher (Saran, 1985: 221). She used two types of questions: firstly objective questions asking for factual information such as 'who did that?' and secondly subjective questions such as 'how did you feel'. She rejects the use of a tape recorder, considering that it might be counter-productive; although this view is countered by Phillips and Economou (1999) who regard tape recording as essential to ensure accuracy of transcription. They suggest that cooperation depends on the provision of information on the aims of research and on establishing good relationships prior to the interview (Phillips and Economou, 1999: 311). Another problem is gaining access to senior policy makers who sometimes exhibit great reluctance to be interviewed, consenting to be interviewed only by senior academics rather than doctoral students or research assistants (Phillips and Economou, 1999: 311). In their

research on the European dimension in education, they used a number of approaches to gain cooperation, including providing each potential interviewee with a full account of the project; a personal letter from the Director; follow-up telephone calls to respond to questions and make arrangements; conducting interviews in the interviewee's first language; giving assurances about confidentiality; providing transcripts of the interview for amendment; and providing a copy of the interim report (Phillips and Economou, 1999: 112).

The author contacted each interviewee by email or telephone, explaining her background and the aims of the thesis and requesting an interview either face-to-face, online or by telephone. In one case, a senior Commission official delegated responsibility to another official to answer questions, however, generally those contacted were generous with their time.

Prior to the interviews, a list of topics was sent to each interviewee. Because of time and locational constraints it was not possible to carry out all interviews in person. Seventeen interviews were carried out in person, six by email, and three by telephone. Telephone and personal interviews lasted between a few minutes to several hours. Extensive notes of the face-to-face and telephone interviews were taken, as it was decided not to tape the interviews. The use of email and computer conferencing software to carry out research interviews is a relatively recent phenomenon, but is regarded as 'worthy of consideration' by some researchers who have successfully used this technology in carrying out ethnographic interviews with hard to reach targets (Crichton and Kinash, 2003). This form of online qualitative research can overcome time and space barriers, while providing documentary backup of interactions, thus improving the accuracy of transcription; it can also reduce travel costs. The limitations include technical problems arising from non-receipt of messages as well as missing the sensory cues of face-to-face messages. Nevertheless, Crichton and Kinash conclude that the technology

facilitated stimulating dialogues...we feel that we were able to sustain conversations beyond the scope of many traditional face-to-face interview sessions...even though the technology is emerging and improving, the potential is clearly rich, inviting and worth continued study (Crichton and Kinash, 2003: 5).

As mentioned above, six interviews were conducted by email; the benefits included an accurate record of the respondent's views. However, some respondents were reluctant to spend time writing out lengthy responses and preferred to use the telephone where it was not possible to arrange a face-to-face interview. No response was received from six individuals contacted by email despite a number of reminders. A further three individuals acknowledged the request, but had not responded at the time of writing.

Those interviewed comprised a cross-section of senior policy makers and ODL professionals, including sixteen representatives of ODL networks; six current or former Commission officials; two national policy-makers; two MEPs and one project coordinator. The interview notes or email messages were analysed under a number of headings and the results incorporated in the relevant chapters to explain or clarify certain issues, or to support arguments.

### **3.7 QUESTIONNAIRE SURVEY**

Finch (1986) quotes Platt's objections to the use of survey data in policy research. While these data can provide factual information, they are limited in scope and respondents may not be able to envisage changes or provide relevant information about them. The weakness in using surveys to develop policy relevant theories lies in the survey's ability to confuse



attitudes with behaviour. In addition, because data to be collected must be specified in advance, only theories formulated in advance can be tested, and they lack flexibility once set up (Platt, 1972). Another weakness of surveys is the problem of non-response which may affect the reliability of the data collected. Nevertheless, this thesis was concerned to ascertain the views of students on the role of the EU in educational policy-making as well as their perceptions of the elearning policy promoted by the EU. It was decided that a structured questionnaire was the most appropriate instrument to collect these data. The author drew up a questionnaire which was administered to students in Oscail and in Queen's University Belfast. This survey achieved an overall response rate of approximately 30%, however, the final response of 751 was considered to be sufficiently large to allow for some conclusions to be drawn. As an additional means of validating the response, data drawn from a similar survey carried out among students across a broad range of countries in Europe were made available to the author for comparative purposes. These issues will be discussed more fully in Chapter 10.

### **3.8 ETHICAL ISSUES**

In any form of research it is necessary to consider ethical issues especially in relation to documents not in the public domain for which informed consent may be required (Mason, 1996: 78). In all cases, every effort was made to ensure informed consent. Respondents to questionnaires were informed that all data would be treated in confidence and that no individual would be identified. Interviewees were requested to indicate whether they wished their identity and views to remain anonymous.

### **3.9 CONCLUSION**

This thesis adopts a case study approach to the topic, utilising a mix of qualitative and quantitative methods. The research design has used a number of standard methodologies employed in research on EU education policy-making and implementation, i.e. documentary analysis and interviews with key officials. However, the addition of a large-scale quantitative survey is relatively unusual in this type of research. The mix of approaches has been used in order to obtain the data needed to answer the key research questions identified in Chapter 2. The main concern is to ensure that evidence obtained is reliable and that the conclusions reached on the basis of this evidence can be regarded as valid. The next three chapters will analyse the development of distance education policy in Europe between 1957 and 2004.

## **CHAPTER 4: Distance Education and the EU Policy Stream 1957-1987**

*Unity in Europe does not create a new kind of great power; it is a method for introducing change in Europe and consequently the world...it is not a blueprint, it is not a theory, it is a process that has already begun, of bringing peoples and nations together to adapt themselves jointly to changing circumstances (Monnet, 1962: 203)*

### **4.1 INTRODUCTION**

Accounts of EU policy on distance education tend to start with the European Parliament resolution on open universities and the launch of a number of action programmes in education and training in 1986-87. However, policies rarely emerge from a vacuum, and it is often necessary to go back to trace the origins of the policy in order to understand the particular circumstances and events which came together to generate the new policy idea, and which created the climate for its acceptance. Accordingly, any attempt to understand how distance learning came to assume a key role in EU policy in the 1990s, must start with the origins of the EU in 1957. The Treaty of Rome, signed in 1957 appeared to provide little scope for involvement in education and training; yet, a commitment to encouraging the development of distance education was inserted in the revised Treaty signed in Maastricht in 1992. For the next few years, distance education appeared to play a significant role in the EU's lifelong learning strategy. Yet, by 2000 the term distance education was no longer part of the Commission vocabulary. The new term 'elearning' had come to be regarded as a key pillar of the Lisbon process and an elearning initiative was launched on 31 December 2003 (CEC, 2001a; CEC, 2003a). However, by 2004, even elearning was no longer mentioned in the context of future EU initiatives post-2006. The background to the rise and decline in the role of distance education will be explored in this and the following two chapters.

As discussed in Chapter 2, Kingdon's policy streams framework will be used in analysing the course of development of EU policy-making on ODL (Kingdon, 1995). As this chapter and Chapters 5 and 6 will show, policy-making is a complex and never a linear process. Problems, issues and ideas float around, inside and outside of the policy stream, until such time as events or system incongruities or political challenges emerge which demand solutions. At these times, a 'policy window' may open to allow a particular policy solution into the mainstream. In these chapters, it is argued that EU policy in ODL can be explained as a response to the convergence between developments in new technologies which led to societal and economic disturbances, and the parallel enlargement of the European Union, demanding a response from the education and training systems not only to provide the new skills required for the Information Society, but also to contribute to the formation of a European consciousness among the citizens of the enlarging Europe. The distance education system was poised to provide this response, having come to maturity in the mid 1980s following a decade of increasing acceptability at national and international level.

The current chapter covers the thirty year period between 1957 and 1987, a period which is often dismissed as being of little relevance in the development of EU distance education policy. However, as this chapter will demonstrate, there was much going on during this time in the form of seemingly unrelated initiatives and events which help to explain the arrival of distance education on the policy agenda in 1987. This chapter discusses these events in the context of the various streams which eventually coalesced in the opening of the policy window which allowed distance education to enter the mainstream of EU policy-making: these are the economic, social and technological context; contemporary developments in

distance education systems; and developments in EU education and training policies. As this chapter will demonstrate, social, technological and economic changes led to growing demands for the introduction of new information technologies (NITs) in initial education; in parallel, distance education gradually emerged as a significant and acceptable provider of higher education in the Member States; and the EU began to evolve beyond the relatively narrow economic concerns of the 'founding fathers' of the Union. The chapter will finish with a detailed analysis of the significant milestones in the EU education and training policy process which paved the way for the acceptance of distance education as a major element of policy in the 1990s.

## **4.2 EU EDUCATION AND TRAINING POLICY 1957-2004: AN OVERVIEW**

It is generally accepted that education was not part of the original remit of the European Economic Community; the vastness and urgency of other tasks to be accomplished 'did not allow for attention to be paid to education' (CEC, 1982; Neave, 1984; Nihoul, 1999). It is also often pointed out that the three Treaties which established the European Communities, the European Coal and Steel Community (1951), the European Economic Community (The Treaty of Rome 1957), and the European Atomic Energy Community (EURATOM 1957) contained no direct references to education policy (Neave, 1984; Nihoul, 1999). Nevertheless, the issue of vocational training was on the agenda, and despite efforts to distinguish training from education, there was always overlap between the two areas. It was thus inevitable that attention would turn to the educational arena. Corbett's research on the pre-decision negotiations on EU policy from 1955-1995 found that higher education 'was an issue of intense interest to EC decision-makers from Day 1 of the Community's history' (Corbett, 2003b). It is interesting to note that in a speech to trade unions in 1959 Monnet expressed his great concern at the impact of unequal access to education in the Community:

The unification of Europe which we are achieving together will only fully bear fruit if our countries put an end to the waste of their young people's intelligence by making access to higher education genuinely democratic. The majority of people ought to be able to enter higher education: it should not be the preserve of the minority (Monnet, 1978: 490).

The establishment of a European University Institute was discussed at the Messina Conference in 1955, but due to lack of consensus, the idea of a common education policy was subsumed under vocational training in the Treaty of Rome (Corbett, 2003a; McCann, 2001).

In subsequent years, creative interpretation of a number of articles in the Treaty allowed the Commission to take on a role in education and training, at first by clearly restricting its actions to vocational training, but gradually through a series of action plans and initiatives to involvement in school education, higher education, and finally all levels of education and training, as specifically supported by Articles 126 and 127 of the Maastricht Treaty (later renumbered Articles 149 and 150 of the Amsterdam and Nice Treaties). According to McCann (2001), economic integration has been the driving force of all EU policies.

Since 1957 the imperative of economic integration has put pressures on the Member States to slowly deconstruct their national educational policies and to incorporate them within the grander strategy of European economic unification...[it] has taken over forty years to implement the basics of a pan-European education system (McCann, 2001: 621).

It is possible to identify four phases in EU policy-making in ODL, where political, social, and technological developments created pressure points or junctures, requiring change or renewed effort in policy-making. The first phase, from the Treaty of Rome in 1957 to the European Parliament resolution on open universities in 1987 saw distance education emerging as an instrument redressing disadvantage and upgrading skills and qualifications at national level,

with growing awareness of its potential at European level. The second phase, from 1987 to 1993 saw growing demands on ODL as an instrument to deliver the skills needed for the Information Society at all levels in Europe. ODL reached its apogee with the publication of the Commission's ODL and Higher Education memoranda and the Treaty of Maastricht commitment to encouraging 'the development of distance education', which in turn provided the legislative framework to develop initiatives in this area. This period saw the move towards closer economic, monetary and social union, with the Single European Act in 1987, and the completion of the Internal Market in 1992. The unanticipated collapse of the communist governments in Eastern Europe starting in 1989 also stimulated moves to enlarge the EU to the East, with a consequent impact on education and training policy. The third phase, from the Socrates programme to the Lisbon summit in March 2000, saw ODL bedding down into the EU policy portfolio, becoming recognised as part of the *Acquis Communautaire*.<sup>9</sup> This period also saw intensive efforts to establish Europe as a competitive force in the global economy, as well as preparations for enlargement, with the adoption of *Agenda 2000*<sup>10</sup>, and the extension of ODL measures into Eastern Europe. The final phase, which at the time of writing is currently unfolding, sees ODL being supplanted by the elearning agenda, and a convergence between ODL and the conventional education system.

This chapter will be concerned with the first phase of policy-making between 1957 and 1987, while the later phases will be dealt with in Chapters 5 and 6. Before discussing the details of EU policies in the period, the next section will outline the political, social and technological context in which EU policy-making was located. This will be followed by a discussion of the developments in distance education in the period.

### 4.3 THE POLITICAL, SOCIAL AND TECHNOLOGICAL CONTEXT 1957-1987

The European Economic Community emerged from the economic, social and political chaos left behind by the Second World War. Starting with the formation of the European Coal and Steel Community in 1951, and following a lengthy series of negotiations, six states, Belgium, France, Germany, Italy, Luxembourg and the Netherlands came together to form the European Economic Community and the European Atomic Energy Community under the Treaties of Rome in 1957. Initially, the 1960s were boom years, however, the oil crises of 1974 and 1979 and the global unemployment recession created favourable circumstances for the EU to intervene in retraining large numbers of unemployed in Europe (Field, 1998; McCann, 2001). This period engendered grave concerns in Europe, as evidenced in a briefing delivered by the Taoiseach to the Dáil on his return from a European Council meeting in 1981, where he referred to the 'sombre outlook for the Community economy' then in recession, forecasting a decrease of 0.6% in GDP, and 8.5 millions unemployed in the Community, with poor prospects for growth due to high interest rates, high energy prices, and declining incomes.<sup>11</sup> This meeting had made the case for increased education and training, especially in technical skills. Arising from the global economic circumstances 'various elites in governments, business and the Commission during the first half of the 1980s began contemplating new economic, technological and political strategies that could reinvigorate European integration and meet the different challenges' (Beukel, 2001: 136).

<sup>9</sup> The *acquis communautaire* is the term used to denote the accumulation of principles, policies, laws, practices, obligations and objectives which have been adopted over the years by the EU (Bainbridge, 2002).

<sup>10</sup> CEC *Agenda 2000* Bulletin of the European Union supplement 5/97 16 July 1997. This document outlined the Community strategy for enlargement to include ten applicant states and was adopted by the Luxembourg Council 12-13 December 1997 (see Bainbridge, 2002: 7).

<sup>11</sup> Dáil Debates 26 March 1981. Vol 328. European Council Meeting: Statement by the Taoiseach

The extent of technological change in this period cannot be underestimated. The world economy moved from the industrial society based on mass production and mechanical systems, to the Information Society based on electronic systems and flexibilisation. The development of EU education and training policy has been fuelled by constant concerns with narrowing the technology gaps with its main competitors (largely the United States and Japan) as well as coping with the effect of technological change on the structure of industry and commerce. Significantly, the Treaty of Rome was signed in 1957, the same year the Soviet Union launched the Sputnik, an event which caused a mini panic throughout the rest of the world, leading to fears of deficits in science and technological skills (Blackhurst and Edyburn, 2000; Green, 1997). The years after 1957 were characterised by massive leaps in technology. Large-scale mainframe computers had developed in the 1940s; by 1958, IBM's Watson Research Centre was experimenting with computer-aided instruction, teletype and terminals to schools.<sup>12</sup> In 1960, the PLATO project using 'teaching machines' was initiated at the University of Illinois, and Echo, the first communications satellite was launched. By 1969, the ARPANET system had been developed which allowed researchers at UCLA and SRI International at Menlo Park California to communicate, a system which would eventually evolve into the Internet.<sup>13</sup> The first email message was sent in 1971, and in 1979, the first proprietary online service was launched by CompuServe (Blackhurst and Edyburn, 2000).

In 1968 the first mouse device was linked to a computer, and the first graphical user interface were demonstrated, although not taken up commercially until Apple Computers introduced these features in the mid 1980s.<sup>14</sup> Intel invented the microprocessor in 1971, the device which allowed computers to move from the large, expensive mainframes, to personal computers. The first personal computer, the Altair 8800 was introduced in 1975<sup>15</sup>, followed by a number of other brands including the Apple II, the Commodore PET, and the Tandy TRS-80 all released in 1977 (Blackhurst and Edyburn, 2000). The adoption of 'home computers' surged when IBM launched its personal computer, using the MS-DOS operating system, in 1981, followed in 1983 by the Apple IIe and other brands. All of these developments led to substantial changes in business, industry and commerce, leading to the elimination of huge numbers of unskilled jobs and the demand for new and higher level skills for the new economy made possible by technological advances. As the next section demonstrates, distance education was to be strongly affected by the changing economic and technological developments in the thirty years between 1957 and 1987.

#### 4.4 DEVELOPMENTS IN DISTANCE EDUCATION 1957-1987

At a conference in 1967, Edstrom observed that 'It is a significant fact that education by correspondence holds a strong position in societies that are in rapid transition and where change is accepted and even actively encouraged' (Edstrom, 1967: 6). In 1962, many of the established private correspondence education colleges came together to form The European Council for Correspondence Education. This organisation published the journal *Epistolodidaktika* from 1963 and was the precursor of the European Association of Distance Learning (EADL). The 1960s also saw distance education starting its move towards centre stage in the public higher education sector. Over the next two decades, spurred on by the success of the UK Open University (UKOU), national governments sought to redress the previously low levels of qualifications among the adult population through launching distance education initiatives (MacKeogh, 1988: 36). In Ireland, the Murphy report (1973) on adult education recommended that a committee should be set up to consider the implications for

<sup>12</sup> Consumer Electronics Association Digital America  
[http://www.ce.org/publicat...ces/digital\\_america/chronology](http://www.ce.org/publicat...ces/digital_america/chronology) accessed January 2004.

<sup>13</sup> *ibid*

<sup>14</sup> *ibid*

<sup>15</sup> *ibid*



Ireland of the UKOU and there was considerable debate throughout the 1970s on the appropriate model to adopt, ultimately leading to the establishment of Oscail – the National Distance Education Centre in February 1982 (MacKeogh, 1988; 1998). By the mid 1980s Holmberg (1985) had identified some 1,500 distance education institutions, many of them modelled on the UK Open University. According to Rumble, by the 1970s there were signs that the ‘dubious’ reputation of distance education was being overcome ‘The best providers, both public and private, wanted to offer accessible educational opportunities, based on quality materials, leading to reputable qualifications’ (Rumble, 2001a: 228). This period saw the establishment in rapid succession of open universities and consortia of distance education establishments as listed in Table 4.1 below. Similar developments were taking place outside Europe at the same time. The Briggs Report published in 1987 recommended the establishment of a ‘University of the Commonwealth for Cooperation in Distance Education’ which eventually became the Commonwealth of Learning based in Vancouver in 1989. A number of large-scale open universities were established (e.g. the Sukhothai Thammathirat Open University Thailand 1978; the University of the Air in Japan 1983; the Indira Gandhi National Open University 1985).

**Table 4.1: Establishment Of Distance Education Institutions 1939-1987**

Country	Organisation	Date	Organisation
France	CNED - Centre National d'Enseignement a Distance	1939	Single Mode institution
Germany	DIFF - Deutsches Institut fur Fernstudienforschung an der Universitat Tuebingen	1967	Research institution
Norway	NADE - Norwegian Association for Distance Education	1968	Consortium
UK	Open University	1969	Single Mode institution
Spain	Universidad Nacional a Educacion a Distancia	1970	Single Mode institution
Germany	FernUniversitat	1974	Single Mode institution
Finland	FADE - Finnish Association for Distance Education	Mid 1970s	Consortium
Netherlands	OUNL - Open Universiteit	1981	Single Mode institution
Denmark	JOU - Jutland Open University. Later DAO - Danish Association of Open Universities	1982	Consortium
Ireland	Oscail/National Distance Education Centre	1982	Consortium
Sweden	SADE - Swedish Association for Distance Education	1984	Consortium
Italy	CUD - Consorzio per l'Universita a Distanza	1984	Consortium
Belgium	STOHO - Stuurgroep Open Hoger Onderwijs	1987	Consortium
France	FIED - Federation interuniversitaire de l'Enseignement a Distance	1987	Consortium
Europe	SATURN	1986	Network
Portugal	Universidade Aberta	1987	Single Mode institution
Europe	European Association of Distance Teaching Universities	1987	Network
Europe	European Programme for Advanced Continuing Education (EuroPACE)	1987	Network

Source: EADTU *Mini Directory* 1997/98 Heerlen: EADTU; information on CUD from EADTU *European Association of Distance Teaching Universities Membership* 1994 Heerlen: EADTU

The key characteristic of distance education was that it offered the kind of flexibility with regard to place, time and pace which conventional education systems were unable or unwilling to offer. In addition, the approaches adopted, utilising self-instructional materials, meant that distance education could benefit from economies of scale and enrol greater numbers than many traditional universities were able to accommodate. One of the early preoccupations of the largely publicly funded distance education institutions was to establish their respectability and quality by focusing on high quality instructional design, course



materials and student support systems. However, the lack of interactivity caused by the asynchronous nature of the postal system was a constant concern for distance educators. As a consequence, distance educators were constantly open to the possibilities of using technology to enhance learning, as well as to sharing experiences and expertise with other distance education providers. By the end of 1987, for reasons which will be discussed more fully in Chapter 6, the various national OUs and consortia had initiated moves to cooperate on a more formal basis, with the establishment of SATURN in 1986, and the European Association of Distance Teaching Universities (EADTU) in 1987.

The expansion in distance education institutions in this period was accompanied by an increase in the use of technology to develop and deliver instruction.<sup>16</sup> In Nipper's terms, distance education was moving to the second generation using a mix of media, but had not entered the third generation, involving computer-based networked technologies (Bates, 1990a; Nipper, 1989). In a 1979 paper, Van Schalkwijk (1979) summarised the emerging technologies which were likely to impact on distance education in the 1980s as comprising: transmission systems (cable TV, satellites); supporting systems (teletext, teleblackboard); and individualising systems (video recorder; video long playing records, PCs, view data). However, despite the rapid progress in technological development, up to the late 1970s, distance education continued to use printed correspondence texts as the main learning medium usually delivered by the postal system.

Educational broadcasting has a long history in US higher education, although rarely used in Europe. Educational radio had started as early as the 1920s in the US; instructional television broadcasting started in the 1960s and the National Technological University (NTU) using satellite broadcasts was launched in 1985. In 1964, the University of Wisconsin launched its 'Articulated Instructional Media' project which combined correspondence materials, study guides, radio and television broadcasts, audiotape and telephone conferencing for off-campus students; a format which was a source of inspiration for the UKOU.<sup>17</sup> Attempts to expand the use of educational broadcasting in Europe could be said to have started with the UKOU which was originally designated 'the University of the Air' and which made substantial use of television and radio broadcasting in its early days. The Ewing Report envisaged a continued reliance on broadcasting, at least until such time as the cost of video recorders became affordable (Ewing Report, 1987). By the mid-1980s, the European Commission was actively supporting the establishment of European satellite networks based on the NTU model<sup>18</sup> (Cerych, 1986). But it was not until the mid to late 1980s with the development of microcomputers linked with communications networks, with rapidly expanding capacity, using increasingly user-friendly software, accompanied by constantly falling prices, that it became feasible to think of using computer-based technology in distance education on anything other than an experimental scale. At this stage, as will be seen in the following section, distance education was poised to take advantage of the 'policy window' opened after some thirty years of EU involvement in education and training policy.

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<sup>16</sup> It is important to note that while the use of technology to deliver instruction to students was constrained by cost and accessibility factors, among others, distance education systems were in a position to make extensive use of technology in administration and preparation of course materials (see articles in Bates, 1990a).

<sup>17</sup> PBS – a brief history of distance learning <http://www.pbs.org/als/dweek/history> accessed January 2004.

<sup>18</sup> Glyn Martin, who was present at the inaugural meeting of EuroPACE, a European Satellite based continuing education network, set up in June 1987 with support from industry and the European Commission (Interview 26 September 2003).

## 4.5 THE EU POLICY STREAM 1957-1987

Educational policy-making in the EU is characterised by institutional fragmentation and complex decision-making processes involving a range of institutions including the Council of the European Union (also known as the Council of Ministers); the European Commission, the Education Committee, the European Parliament, the Economic and Social Committee and the Committee of the Regions (Hake, 1999). The role of these institutions will be outlined in greater detail in Chapter 7. This section will start with a general overview of the key milestones in education and training policy between 1957 and 1987, before discussing the way in which concerns with the impact of the new technologies led to a stream of policy-making in the 1970s and 80s. The section will finish with an account of how distance education encountered a policy window in 1987, with the European Parliamentary resolution on Open Universities.

### 4.5.1 GENERAL EDUCATION AND TRAINING INITIATIVES 1957-1987

The Treaty of Rome, signed on 25 March 1957, defined the main task of the Community as follows:

The Community shall have as its main task, by establishing a common market and progressively approximating the economic policies of Member States to promote throughout the Community a harmonious development of economic activities, a continuous and balanced expansion, an increase in stability, an accelerated raising of the standard of living and closer relations between the States belonging to it. (Article 2, Treaty of Rome)

While the Treaty did not make express provision for education, nevertheless several elements of the Treaty and secondary legislation did in fact have a potential impact on education, especially in the area of workers' mobility, education of migrants' children and recognition of qualifications (Barnard, 1995: 14). The provisions in the Treaty of Rome which were to facilitate Commission involvement in education and training included:

- *Article 57* which allowed for mutual recognition of qualifications across Member States in order to facilitate mobility of workers; this provision had an inevitable spillover with regard to higher education.
- *Article 118* which promoted closer collaboration between Member States in the social field, particularly in matters relating to employment, labour legislation and working conditions, vocational training, social security, occupational safety and health, right of association and collective bargaining. The Commission was directed to act in close contact with Member States and in consultation with the Economic and Social Committee by 'making studies, delivering opinions, and arranging consultations both on problems arising at national level and on those of concern to international organisations'.
- *Article 126.2* allowed for assistance from the European Social Fund to be allocated to the retraining of unemployed workers (a provision which was used to great effect to support the early development of the Regional Technical College system in Ireland).
- *Article 128* made an explicit commitment to developing a vocational training policy: The Council shall, acting on a proposal from the Commission and after consulting the Economic and Social Committee, lay down general principles for implementing a common vocational training policy capable of contributing to the harmonious development both of the national economies and of the common market.<sup>19</sup>

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<sup>19</sup> It was this article which allowed the Community to exercise a progressively wider role in education and training policies in the years up to 1992 when the Maastricht Treaty effectively copperfastened the Community's competence in education and training. The European Council adopted its first common vocational training policy in 1963.

- The Euratom Treaty (Article 9) proposed the establishment of the European University Institute, finally established in Florence in 1972.

While McCann (2001: 627-8) notes that individual Member States recognised the role of education as a channel for social, economic, cultural and political change, education was seen as largely the concern of national governments, and the early 1960s were characterised, in Neave's terms by a 'strange silence' at European level when it came to education policy (quoted in McCann, 2001: 627). However, the Resolution of 1963 (discussed in detail later in this chapter) helped somewhat to clarify the European interest in education, as it was committed to a holistic approach, combining economic, technical and personal development.<sup>20</sup>

The Ministers for Education met as a group for the first time in November 1971 and subsequently commissioned Professor Henri Janne (the Belgian Minister for Education) to review community education policy with the intention of initiating future action programmes (McCann, 2001: 634). The Janne Report *For A Community Policy On Education* was published in February 1973 (CEC, 1973) and set out the basis for consensus on the need for a common policy on education, not just at initial level, but also in the context of lifelong learning (or 'permanent education') which was to move in and out of the EU policy stream until its consolidation as a keystone of EU educational policy in the Lisbon process in 2000 (McCann, 2001). The Report discussed four common themes which were to prevail in EU initiatives for the next ten years: 1) academic mobility; 2) mutual recognition of academic qualifications; 3) education of migrants' children; and 4) inclusion of the European dimension. This report will be discussed in greater detail below.

In January 1973, formal responsibility for initiating and monitoring EU educational policies was given to Ralph Dahrendorf, Commissioner for DGXII (then responsible for coordinating research and science policies). The Ministers for Education adopted the first educational action plan on 9 February 1976.<sup>21</sup> The plan accepted the principle of subsidiarity in that Member States retained control over the curriculum, but also encouraged cooperation in the context of achieving the macro-economic goals of the EU (McCann, 2001). By 1980 when the 1976 action plan was reviewed<sup>22</sup>, the Ministers for Education had accepted that 'education was a key component of the wider European economic design' (McCann, 2001: 642). In 1981, education policy was moved to DGV (which covered social and employment affairs) then under the Commissionership of Ivor Richards. From then on, 'education was tied to the questions of unemployment and equality of opportunity' (McCann, 2001: 642).

According to McDaniel (1991) the period 1976 to 1986 was the decade of exchange of information, expert working groups and a number of limited policies. The European Court of Justice had a major impact in extending the scope of EU education policy through its interpretations of various articles in the Treaty of Rome. The establishment of a series of action programmes (COMETT, ERASMUS, and LINGUA) was legitimised by reference to Article 128 of the Treaty of Rome which allowed higher education to be defined as vocational training for the purpose of the Treaty. Some of the main Community documents and initiatives as they impact on ODL policy will be analysed below.

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<sup>20</sup> 1963 Decision 63/266/EEC: Council decision of 2 April 1963 laying down general principles for implementing a common vocational training policy (OJ 63 20 April 1963) (CEC, 1986: 153-156)

<sup>21</sup> Resolution of the Council of the Ministers of Education, meeting within the Council of 9 February 1976 comprising an action programme in the field of education OJ C 038 19 February 1976 p1-5

<sup>22</sup> General report of the Education Committee agreed in substance by the Council and the Ministers for Education meeting within the Council at their session of 27 June 1980. (CEC, 1986: 46-60)

#### 4.5.1.1 The Common Policy On Occupational Training 1961-1963

Just four years after the Treaty of Rome, the Commission, acting on Article 128 of the Treaty, drew up a set of proposals<sup>23</sup> which can be regarded as the first steps towards the development of EU policy in education and training. The Commission's 1961 proposals formed the basis of the policy adopted by the European Council of 2 April 1963<sup>24</sup> although there were some significant differences between the two sets of proposals (Wickham, 1981: 142). While most of the Commission's proposals, as agreed by the Council focused on the field of vocational training, some proposals ventured further afield, to encompass teacher training, teaching methods and lifelong learning.

It is interesting to note that the importance of new teaching methods was recognised as early as 1961 as the Commission stressed the need to ensure that the training of teachers and instructors was improved and expanded by means such as the dissemination of the 'most modern teaching methods...and arrangements to keep [them] abreast of technical progress and innovations in teaching methods' (Seventh principle). The Commission highlighted the importance of teacher training, stating that:

Effort should be made in the training and higher training of teachers and instructors in general. The proper training of such staff, the shortage of whom today causes a bottleneck in economic development, is an essential factor for the success of any policy of occupational training (para 9).

The Commission proposed extending beyond narrow vocationalism to the concept of lifelong learning as 'the horizon of knowledge is extending so rapidly that a system of lifelong education becomes a necessity' (second principle). The Commission also attempted to stretch the horizons of vocational training and expand the definition of education. It recommended that a common vocational training policy could meet eight objectives, one of which was 'To create conditions under which all can enjoy the right to adequate occupational training' (Second Principle (b)).<sup>25</sup> The Commission further elaborated the basis of this objective as

The right to adequate occupational training stems from the fact that since human knowledge and ability to create wealth are essential factors for economic development and social progress, optimum utilisation of available resources is imperative, not only out of justice but also as a major objective of long term policy. To each according to his capacity there must be given, by means of an adequate organisation of *education* and occupational training, the opportunity to climb the ladder of general and occupational instruction from the lowest step to the highest (p. 9) (emphasis added)

Two other objectives which indicated the Commission's more liberal interpretation of vocational training included: 'To promote general education and occupational training on as wide a scale as possible to meet the need of a balanced development of personality and the needs arising from technical advances and social progress (Second principle (c)) and 'To provide opportunities for occupational or further training throughout working life at the various levels' (Second Principle (f)). The Commission went on to define education as

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<sup>23</sup> General principles for the implementation of a common policy on occupational training *Bulletin of the European Economic Community* No 12 Annex 1, 1961

<sup>24</sup> Council Decision: Common vocational training policy Decision 63/266/EEC: Council decision of 2 April 1963 laying down general principles for implementing a common vocational training policy (OJ 63 20 April 1963) see (CEC, 1986: 153-156)

<sup>25</sup> The objective of extending access to all was omitted from the 1963 Council decision.

‘everything from primary school to university, including occupational teaching in institutions other than schools and colleges’ (p9).

As evidence of an early resistance from the Member States to the Commission becoming overly involved in what was seen as the national remit in education and training, it is interesting to note that the subsequent Council decision omitted references to teaching methods while inserting a reference to harmonisation of instructor training. Nevertheless, the Council accepted the Commission’s proposed extension of the boundaries of vocational training and its formal decision announced that one of its objectives was to:

broaden vocational education on the basis of a general education, to an extent sufficient to encourage the harmonious development of the personality [emphasis added] and to meet requirements arising from technical progress, new methods of production and social and economic developments.<sup>26</sup>

An Advisory Committee on Vocational Training was established to monitor the implementation of the common vocational training policy comprising initially 36 members: each of the six Member State nominated six representatives, two each from the government, employers and trade unions.<sup>27</sup> However, the Commission principles concerning joint study and research programmes and programmes aimed at stimulating the participation of specific groups of workers, including women, raised concerns that the Commission was exercising what was seen by some Member States as excessive power. According to Wickham ‘the Dutch proposals effectively reduced the Commission’s role and emasculated the proposals of any force and effect’ (Wickham, 1981: 149). While the Commission’s proposals indicate an early interest in a more holistic and liberal approach to education and training, they were considered to have had little impact, with the Community policy

reduced to a set of statements of ambiguous status and although the Commission pressed forward with the formation of a programme of work in conjunction with the advice of a committee of training that was set up, this resolved itself in the end into a pattern of studies, conferences, seminars and exchanges (Wickham, 1981: 151).

Overt involvement in educational matters receded until the June 1973 Council resolution on Vocational Training Policy (Wickham, 1981: 151). Nevertheless reference must be made to these proposals, firstly to establish that education was indeed on the agenda of the Commission, if not the Member States, from the earliest stages; secondly, the Commission proposals for implementation were to emerge again and again at different stages of the EU educational policy-making process. The elements aimed at achieving the Commission objectives included: 1) exchange of experience through the dissemination of information, literature and teaching material, conferences, meetings and seminars; 2) training and retraining of adults to cope with problems of economic expansion or recession, technological and structural changes; 3) the progressive harmonisation of training standards in the context of mutual recognition of qualifications; and 4) concerns with modern teaching methodologies. Finally, the principles contained in the Council decision on vocational training policy were used by the European Court of Justice<sup>28</sup> as a basis for its judgement on the Gravier case which extended the definition of vocational education as:

Any form of education which prepares for a qualification for a particular profession, trade or employment or which provides the necessary training and skills for such a profession, trade or employment...whatever the age and the level of training of the pupils or students,

<sup>26</sup> Council Decision of 2 April 1963 laying down general principles for implementing a common vocational training policy (63/266/EEC) in (CEC, 1986) p. 154

<sup>27</sup> Decision 63/688/EEC Rules of the Advisory Committee on Vocational Training OJ P 190 30 December 1963

<sup>28</sup> ‘The Gravier Judgement Case 293/83 Gravier (1985) ECR 593



and even if the training programme includes an element of general education (Gravier Judgement, quoted in Barnard, 1995: 15).

The 1963 General Principles and the Gravier judgement were then used to justify the extension of Article 128 to cover higher education, and thereby the establishment of the ERASMUS and COMETT programmes among others (Barnard, 1995: 15).

#### **4.5.1.2 Action On Vocational Education 1971-72**

In the late 1960s, the Member States encountered labour market difficulties which led to a demand for an action programme in vocational training aimed at meeting the need for skilled workers. The Council adopted guidelines for an action plan for vocational training on 23 July 1971.<sup>29</sup> The guidelines accepted the notion that education and training are linked together, firmly placing vocational training within the context of a 'general education which corresponds at various levels to the demands of modern society' (para 2). In turn, education and vocational training were linked to economic development as: 'the importance has now been realised of the links between education and the economy and of the development of further education and training and lifelong education and training' (Para 2) and 'in future projects the importance of the growing interdependence between general education and vocational and technical training should be fully recognised' (Para 18).

Besides the link made between education and vocational training these guidelines are of interest because of their focus on broader issues of teaching methodologies, and the use of modern educational technology (para 10), as well as the need for information on learning theories, teaching concepts and new methods (Para 11). The guidelines proposed a programme involving exchanges of information and cooperation at Community level with its main aim:

to improve teaching. This means developing new teaching methods and new didactic principles to ensure and facilitate the use of modern teaching means (including *correspondence courses, programmed instruction, use of computers in education and training*) and the development of courses in education and training at Community level. It would be necessary to examine the different systems and teaching means currently available (audio-visual aids, computers, cassette tape-recorders and so on.) (Para 12). [emphasis added]

The guidelines referred to the necessity of examining the possibility of actions on teaching equipment (teaching machines, computer simulators) and collaboration in radio and television educational broadcasting (Para 17). This is arguably the first time that correspondence (later distance) education featured in a Commission document.

The next major milestone in EU education policy-making was the first meeting of the Ministers for Education of the six members states on 16 November 1971. Earlier in the same year, the Commission had established two working groups to look at educational and vocational training issues under the direction of Commissioner Altiero Spinelli who also participated in the Ministers' meeting (Beukel, 2001; Corbett, 2003b). Accepting the arguments in the 1971 Guidelines, the Ministers issued a short, one-page resolution<sup>30</sup> following their meeting which stated that the vocational training activities provided for in the

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<sup>29</sup> General Guidelines for drawing up a Community action programme on vocational training Adopted by Council on 26 July 1971 OJ C081 12 August 1971 p5-11

<sup>30</sup> Resolution of the Ministers for Education meeting within the Council of 16 November 1971 on cooperation in the field of education (CEC, 1986: 7)



Treaty of Rome should be supplemented by greater cooperation in education, and proposing the establishment of a Working Party to consider criteria for establishing a European Centre for the Development of Education and to make suggestions on ways of 'establishing active cooperation in the field of national education' (CEC, 1986: 7). While the Ministers were not to meet for another three years, the Commission took this resolution as the authorisation to embark on a series of initiatives in education.

#### **4.5.1.3 'A Community Education Policy' The Janne Report 1973**

In 1972 the Commission had set up a working group comprising 35 leading educationalists from the Member States, the United States as well as Denmark and the UK<sup>31</sup>, under the chairmanship of Professor Henri Janne to provide opinions and recommendations for a Community education policy. The 'Janne Report' was published in 1973 (CEC, 1973). While according to Field (1998) the report attracted relatively little attention at the time, nevertheless, it proved to be a seminal influence in directing the path of subsequent EU activities in education and

opened up the spectrum of community competence in terms of provision through the harmonisation of qualifications, the mobility of labour, the link between economic integration and vocational training, technology, language proficiency and Europe as a topic in itself (McCann, 2001: 635).

The main recommendations focused on the introduction of a European dimension into education, teaching of European languages, exchanges of students and teachers, recognition of qualifications, cooperation between universities and the use of mass media and new technologies in the context of 'permanent education'. Of interest to this thesis is the focus in the Report on the transformative role of permanent education in changing all forms of education and its priority on adult education. The Report argued that

because of its 'open' attitude and because of its extremely individual needs, adult training in the framework of permanent education...offers the best possible scope for experiments with mass media and new educational technology (CEC, 1973: 54).

Distance education (in the form of correspondence courses) was seen as an important means of delivering the flexible training required by adults. Several 'interlocutors' referred positively to the role of the Open University as 'a good method of responding to needs which are being increasingly expressed'. Interestingly, the Report listed a 'study of a European Open University' among the recommendations for community action, predating by 14 years the European Parliamentary resolution on open universities which sparked off a series of developments in ODL policy-making in the 1990s (CEC, 1973: 55; Ewing Report, 1987).

The Report is interesting in many ways, not only because of its somewhat radical discussion of deschooling and democratisation of education but also because of its prescience and realism in relation to a number of matters relating to EU policy. The Report noted that the Community pace of work favours the long term approach and is well suited to education, as its evolutionary process is long and 'years go by between the maturing of a new idea and its widespread application' (CEC, 1973: 25). While it was advisable 'to scrupulously respect national structures and traditions where education is concerned' nevertheless, Community action should 'promote necessary harmonisation by means of permanent concerted action at all levels and through more educational exchange' (CEC, 1973: 51). It also forecast (1973: 46) that the 'Community seems destined to play a central part in the field of new technology': suggesting as tasks for the Community, studies, research and experiments in mass media and

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<sup>31</sup> Denmark and the UK were to join the EEC on 1 January 1973. It is interesting to note that no representatives from the other new Member State, Ireland, were consulted.

new technology in education as applied in the training of adult students in the context of permanent education; and the establishment of a specialised body for the purpose of promoting the mass media and new technology from the angle of permanent education to advise the Community. As will be seen, some of the ideas expressed in the report took a long time to reach application stage in the Community.

Despite Field's (1998: 30) contention that the Report received little attention, the report was 'warmly welcomed by the Commission' and was widely circulated for discussion among the various interests in the community (CEC, 1974). The Report was mentioned several times in the course of debates in the Dáil in 1973 and 1974. In particular the references to use of technology in language teaching, the use of mass media and the proposed European Institute were mentioned by the Minister for Education in his report to the Dáil in 1973.<sup>32</sup> Nevertheless, the more radical aspirations of the Report were to be effectively buried by the Commission as will be seen below, for fear of being seen to undermine the subsidiarity principle and the autonomy of the Member States (Corbett, 2002). It could be argued that these aspirations rose to the surface again in the late 1990s and after the Lisbon process to be discussed in Chapter 6.

#### **4.5.1.4 Framing The EC Education Action Plan 1973-76**

The Commissioner, Ralph Dahrendorf had taken responsibility for education under DGXII in 1973. Often regarded as one of the key policy entrepreneurs in EU policy-making, Dahrendorf set about proposing initiatives on language teaching, mobility of teachers and students, and the integration of studies on Europe into the curriculum (Beukel, 2001: 128; Corbett, 2002). As an indication of his influence, it is interesting to note that Dahrendorf's name was mentioned in a number of Dáil debates around the time Ireland joined the EEC in 1973. In a debate in the Seanad in June 1973, Senator Brosnahan expressed concerns about a forthcoming document by Dahrendorf which proposed a meeting of Ministers of Education to 'decide upon the realisation of cooperation in the field of education within a common frame'.<sup>33</sup> Senator Brosnahan went on to say 'As a spokesman for teachers' organisations I can say that we will be very disturbed if we are not consulted about this type of frame. There are frames of education into which we will not be moved'.<sup>34</sup>

Hywel Ceri Jones, who was to become one of the key policy entrepreneurs in the EU policy stream for the next twenty years, joined DGXII as the Head of Education in 1973<sup>35</sup> (Corbett, 2003b; Nihoul, 1999). According to Corbett (2003b: 322) both Dahrendorf and Jones had been 'horrified by the mention of harmonisation' in the Janne report. In their document<sup>36</sup> on education in the European Community submitted for approval at the second meeting of the Ministers for Education 1974, they rejected harmonisation, stating 'to set out with the objective of harmonisation and coordination of the structure and content would be as undesirable as it would be unrealistic' (CEC, 1974: 6). They proposed that the Commission should work with the University community, since education had a place 'in the process of development towards European Union' (Corbett, 2003b: 323). Avoiding most of Janne's recommendations on permanent and adult education and the new technologies, the Commission proposals focused on three areas: 1) encouragement of mobility of teachers,

<sup>32</sup> Dáil Éireann 1973 Debate on Developments in the European Communities Second Report Vol 269 29 November 1973; Dáil Éireann 1974 Mr Wilson: Debate on Developments in the European Communities – Second Report Vol 270 resumed 26 February 1974.

<sup>33</sup> Seanad Éireann 1974 Senator Brosnahan, Private Business: Developments in the European Communities (resumed) Vol 75 21 June 1973.

<sup>34</sup> Ibid.

<sup>35</sup> see [http://www.senlisecouncil.net/modules/about\\_us/jones](http://www.senlisecouncil.net/modules/about_us/jones) accessed 15 January 2004.

<sup>36</sup> Commission Communication COM(74)253 Education in the European Community 11 March 1974.

students and administrators; 2) education of children of migrant workers; and 3) the introduction of a European dimension which was to include language learning, study of European issues, and collaboration between higher education institutions and European schools. The proposals did, however, in the context of university collaboration, refer to the role of the Open University:

The Commission also notes widespread interest throughout the Community in the development of new learning systems and especially in the Open University development, which is designed to reach students who wish to combine part-time study with employment or other commitments, who are widely distributed geographically throughout the country and who may, for one reason or another, have missed the opportunity to proceed to higher education earlier in their careers. The Commission will continue to support pilot projects which assist in identifying the scope for non-traditional learning systems in appropriate circumstances within the Community (CEC, 1974: 15).

The resolution which emerged from the second meeting of Ministers on 6 June 1974<sup>37</sup> endorsed the non-economic dimensions of education, stating: 'on no account must education be regarded merely as a component of economic life' (para 1(ii)). It stressed the importance of cooperation among education systems at European level but ruled out harmonisation as an end in itself, as Jones and Dahrendorf had recommended. In line with the Commission proposals, the Resolution avoided the more radical ideas in the Janne report with regard to adult or permanent education, and the new technologies and mass media in education. The idea of the European Open University was shelved until the mid 1980s. The draft resolution prepared by the Commission had announced the intention to 'support pilot schemes for the development of non-traditional systems of teaching and learning for adults' (CEC, 1974: 19) however, this relatively anodyne provision too was dropped. Instead, the Ministers highlighted seven priority areas for cooperation in education: 1) better facilities for education and training; 2) promotion of closer relations between educational systems in Europe; and compilation of documentation and statistics on education; 3) increased cooperation between higher education institutions; 4) recognition of qualifications and periods of study; 5) free movement of teachers, students and researchers, 6) improved teaching of languages; and 7) equal opportunity for access to all forms of education. The resolution proposed the establishment of an Education Committee to 'foster action' in the priority areas which should report before 30 June 1975. The 1974 resolution established the framework for future Community actions in education and the Community Education Action plan (see below) drawn up by the Commission and the Education Committee, adopted on 19 February 1976<sup>38</sup> followed essentially the list of priority areas in the 1974 resolution.

The Community Education Action Plan adopted in 1976, despite its relatively modest proposals, was a significant milestone in the recognition of the importance of education in EU policy (Field, 1998: 32). Corbett cites the key role played by Hywel Jones in the Commission, Ladislav Cerych, Head of the OECD higher education and the European Cultural Foundation unit, in influencing the Action Plan (Corbett, 2003b: 323). According to Neave

The conviction that education remained central to the elimination of poverty, to the realisation of social justice and the advance of social progress in general, ran strongly in the various discussion documents leading up to the Ministerial Resolution of February 1976 which launched the Community Education Action Plan (Neave, 1984: 198).

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<sup>37</sup> Resolution of the Ministers of Education, meeting within the Council, of 6 June 1974 on cooperation in the field of education OJ C 098 20 August 1974 p2.

<sup>38</sup> Resolution of the Council of the Ministers of Education, meeting within the Council of 9 February 1976 comprising an action programme in the field of education OJ C 038 19 February 1976 p1-5

The Resolution itself refers to the Economic and Social Committee opinion that 'education is central to the full and healthy development of the Community' and proposed that the achievement of

equal opportunity for free access to all forms of education is an essential aim of the education policies of all Member States and its importance must be stressed in conjunction with other economic and social policies, in order to achieve equality of opportunity in society.' (Para IV.20.)

The Action Plan listed twenty two action points under six thematic headings: 1) better facilities for education and training of non-nationals; 2) promotion of closer relations between educational systems in Europe; 3) compilation of up-to-date documentation and statistics on education; 4) cooperation in the field of higher education; 5) teaching of foreign languages; and 6) achievement of equal opportunity for free access to all forms of education.<sup>39</sup> Actions in respect of promoting cooperation in higher education included: a) the encouragement of links, short study visits, joint programmes of study; c) removal of obstacles to mobility and admission to institutions abroad; d) recognition of periods spent teaching abroad in terms of seniority and pensions; e) recognition of qualifications and study periods abroad. Again, the Action Plan does not refer to distance education or make any specific proposals with regard to teaching methodologies. It does, however, mention the use of radio and television in the context of promoting language teaching to meet the vocational training needs of adults (Para IV.17c). However, the thrust of the Action Plan is on initial education, with 'continuous education and training' restricted to young workers and young unemployed people. The Education Committee was given the task of drawing up a report on the implementation of the Action Plan, to be submitted by 1 July 1976. Thus, by establishing the priority areas and setting up a process for overseeing the implementation of the actions, the Action Plan 'constitutes, even today, the principal foundation for research, action and development between the Community and the Member States in the field of education' (Nihoul, 1999: 76). According to Nihoul the Action Plan produced several 'daughters' in 1976, 1982, and 1985 on the transition from school to working life; it also had 'cousins' for example the 1983 resolution on the introduction of new information technologies to education and a 1985 resolution on equal opportunities in education (Nihoul, 1999: 80).

Despite the wide range of actions proposed, progress in Community involvement in education and training over the next five years was slow (Corbett, 2000). Alan Smith, later to be a Commission Official in the ERASMUS unit, wrote concerning the expectations following the Action Plan that:

Few would contend that the expectations have been fulfilled. Charges of 'infectious protectionism' and 'xenophobic tendencies' on the part of national governments still abound; prolonged political wrangling has caused the repeated postponement of a crucial meeting of Ministers at Community level, and it can hardly be taken as an indication of boundless élan on the part of the Member States when the Commissioner responsible for education [Dahrendorf] tells the European Parliament that 'we can only make progress, however slow, in this matter by being as cunning as the snake' [from German text of debate in parliament 24 February 1979] (Smith, 1980: 77)

In 1979, the *European Journal of Education* decided to publish a special edition on future directions for EU policy in education, in the wake of the 1976 Action Plan. However, the editor found that it was too early to compile a volume on European education policy, due to the scarcity of writers capable of contributing to the volume; the European Parliament was too

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<sup>39</sup> The 1974 Resolution priorities on recognition of qualifications and mobility of teachers had been distributed among the other priorities, while teaching of languages emerged as a theme in its own right.

young to have developed original thought on educational policy (it had been elected in June 1979); and even the members of the European Parliament Committee for Youth, Culture, Education, Information and Sport could not be considered 'well prepared for such a task' (Fragniere, 1979).

#### **4.5.1.5 Revival Of Education And Training Policy-Making 1980s**

The return of education to the Council agenda may be associated with a number of, in Kingdon's terms 'focusing events' (Kingdon, 1995). At the institutional level, in 1981, the Education Director, Hywel Jones negotiated the transfer of his unit from DGXII to DGV which then joined together employment, living and working conditions and welfare; education, vocational training and youth; the European Social Fund; and health and safety (Corbett, 2003c: 7). He then set about tackling a number of key issues, including the role of technology transfer, in the context of teacher training and information technology (Corbett, 2003c: 7). It is interesting to note the changes made by the Council<sup>40</sup> to the Commission's 1982 communication<sup>41</sup> on vocational training strategy, as an illustration of the role of policy entrepreneurs in keeping certain policy ideas alive until another policy window opens. Clive Norris (a staff member on the Commission) reported that the Council resolution altered some of the Commission proposals, for example, the social guarantee of training for young school leavers was watered down; and the reference to training of older workers and paid educational leave was omitted (Norris, 1983). However, the Commission was not content to see these proposals disappear: Norris points out that the 'Commission is also convinced that thousands of older workers - such as those adversely affected by industrial restructuring - need assistance. Thus the balance of the Community strategy may need to be re-examined in due course.' (Norris, 1983: 35). Another Commission official, Andre Kirchberger, who became Principal Administrator of the COMETT programme, wrote that Council resolutions are not the 'finishing points'. It is not sufficient to make short-term adjustments to training, instead

it is essential to evolve the broad lines of skilled training courses incorporating these new technologies - otherwise we are likely to become their passive victims. In this sense the resolution of 2 June 1983 represents a starting point for joint action supported by Community measures (Kirchberger 1983: 38).

Pressure on the Commission came from industry when the European Round Table of Industrialists (ERT) was established in 1983 by the Chief Executives of seventeen major European companies, with the support of the Commissioner for Industry, Etienne Davignon. Its purpose was to create 'an organisation better able than others to wake up governments to the parlous state of the European economy' (ERT, 2003). This body was a powerful agent in setting the agenda for the EU, pressing for the completion of the European single market; action on unemployment; employment markets; improvement of transport links between Member States; the single currency; accounting standards; pension rights; utilities; competitiveness; and enlargement of the EU. Most critically, ERT claims that it has 'persistently campaigned for high-quality education and training' (ERT, 2003: 13).

At the political level, European Parliament elections took place in 1984 introducing a new cohort of MEPs, but the low turnout at these elections was a cause of concern to the Community, suggesting an increasing alienation of the population from the European Community ideal (Nihoul, 1999: 141). The European Council meeting in Fontainebleau in June 1984 set up the Dooge Committee to 'make suggestions for the improvement of the operation of European cooperation in both the Community field and that of political or any other

<sup>40</sup> 1983 Council resolution of 2 June 1983 concerning vocational training measures relating to new information technologies (OJ C 166 25 June 1983) (CEC, 1986: 81-84).

<sup>41</sup> Commission Communication to the Council on Vocational Training Strategy COM(82)637 Final.



cooperation' (Bainbridge, 2002: 135). According to Katherine Meenan, Head of the Secretariat of the Dooge Committee, Garret Fitzgerald, President of the Council during the Irish Presidency, wrote to the Committee, suggesting that they include 'the possibility and modalities of common action in, for example, the fields of *education*, culture, health, justice and the fight against terrorism' (Meenan, 1999: 59). This Committee set the stage for the Treaty on European Union (Maastricht).

The new Commission established in 1985, under the Presidency of Jacques Delors injected an impetus into education and training policy, which became linked with the preparations for the completion of the internal market in 1992. At the same time the Council agreed at its meeting in Milan in 1985 the 'People's Europe Report' which recognised the importance of creating a European Community which was more than just an economic entity; this report proposed eight action areas in educational mobility and exchanges, although distance education or indeed educational technology was not mentioned (CEC, 1986: 137-139). The Single European Act, signed in 1986, entered into force in 1987. While making no direct reference to education as such, it ushered in a new era of educational policy-making linked with preparing for the completion of the internal market by 1992, enabling the Commission to develop a series of new programmes in the fields of education and training (COMENIUS, ERASMUS, COMETT, DELTA, FORCE, IRIS, LINGUA) (Hake, 1999). The ERASMUS and COMETT programmes in particular received support from the Education Commissioner, Peter Sutherland because of their links to the Delors objective of completing the Single Market (Corbett, 2003c: 7).

The next section will review some of the strands in EU policy-making which were to link the concept of distance education with the growing concern with how education and training could respond to the challenges of the new information technologies (NITs).

#### **4.5.2 TECHNOLOGY ENTERS THE EDUCATIONAL POLICY STREAM 1971-1987**

As we have seen, the concept of distance education and new technologies applied to education and training had received little attention throughout much of the relatively meagre stream of policies on education and training emanating from the EU in the 1960s and early 70s. Nevertheless, the issue had surfaced in a parallel stream through the Council of Europe, a pan-European body representing over thirty European countries. The Council had proposed the establishment of a European Television University (European Inter-University Institute for the Development of multimedia distant study systems) in 1971.<sup>42</sup> The recommendation was based on a detailed report by an Italian Member of Parliament, Professor Vedovato<sup>43</sup> which saw the Institute operating in cooperation with other universities. However, the idea was ahead of its time and the proposal was shelved following failure to agree on the location of the Institute in the UK Open University in Milton Keynes, the Deutsches Institut für FernStudienForschung, Tübingen, or the City of Florence (Seabright and Nickolmann, 1992: 2).

Despite the lack of success of these proposals the Council of Europe continued to keep the issue of distance education and multimedia in education on the agenda of its Committee for Higher Education and Research and the Standing Conference on University Problems. The

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<sup>42</sup> Council of Europe Recommendation 650 (1971) on the creation of a 'European Television University' (European Inter-University Institute for the development of multimedia distant study systems) reproduced in Seabright and Nickolmann (1992 : 4).

<sup>43</sup> Council of Europe Document 3018 (1971) Extracts reproduced in Seabright and Nickolmann(1992:4-5).



Council organised an influential conference on the theme of new communications technologies in post-secondary education in Strasbourg in 1979. Ten years later, in 1989, Sir William Shelton was requested to prepare a follow up to the Vedovato report in the light of subsequent institutional and technological developments.<sup>44</sup> Sir William recommended the establishment of a 'Board for Distance Teaching in Europe' to 'serve not only as a catalyst and to ensure a minimum coordination of European initiatives and standards in distance teaching, but also to analyse and evaluate such initiatives and to propose new ones'.<sup>45</sup> The Standing Conference of European Ministers of Education considered the proposal at their Sixteenth Session in 1989<sup>46</sup> and while not specifically endorsing the establishment of a Board for Distance Teaching, nevertheless recommended that European education systems should be encouraged to exploit 'the full educational potential of the new information technologies and the media' (Para 1) and that the Council of Europe should encourage the sharing of research findings on the use of new technologies in education. Despite the Ministers' lack of endorsement of the concept of a European Board for Distance Education, a series of feasibility studies on the idea were published in 1991 (extracts are reproduced in Seabright and Nickolmann, 1992: 19-65). However, by that stage policy-making in the EU had, in a sense, caught up with developments in the Council of Europe and, as will be seen below, the concept was now an idea whose time had passed. Nevertheless, it is important to bear in mind when studying EU policy that policy-making does not take place in a vacuum. There is often spillover, and policy borrowing, not to mention policy learning going on between different transnational bodies. Clearly, much of the development in EU policy was influenced by the deliberations of the Council of Europe, and vice versa.

Returning to EU policy, while the 23 July 1971 guidelines<sup>47</sup> had referred to the use of modern teaching methodologies it was not until 1978 that the first discussion of the new technologies took place at the meeting of Heads of State in Bonn in July 1978 (Nihoul, 1999: 128). This meeting effectively generated another stream of policy-making aimed at introducing NITs in education and training; however, this stream was not to merge with the distance education stream until the mid 1980s. Following the European Council Meeting in Bonn, the Commission prepared a communication for the meeting of the European Council in Dublin in November 1979 on 'European society faced with the challenge of new information technologies: a community response' which resulted in the Council requesting the Council of Ministers to prepare a strategy for using these technologies (CEC, 1986: 81). These policies were to be adopted in 1983.

Between 1983 and 1986 the debate on the role of NITs in education and training continued to grow both within the Commission and among academics and policy makers outside of the EU structure. As mentioned above, the Council of Europe organised a conference in Strasbourg in September 1979 on the new educational technologies, from which several articles in a special issue of the *European Journal of Education* were drawn (Cerych and Neave, 1980: 225). Clearly, even at that early stage a sense of disillusion with technology was evident. The contributions to the issue highlighted the 'tremendous potential' of the new technologies for distance education, but the Editors concluded that 'the inflated expectations of twenty years ago, now often transformed into a no less dramatic sense of disillusion have, in recent years,

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<sup>44</sup> Parliamentary Assembly of the Council of Europe: Document 6065 on Distance Teaching – Explanatory Memorandum (1989) Sir William Shelton. Reproduced in Seabright and Nickolmann (1992:14-15).

<sup>45</sup> Ibid p14.

<sup>46</sup> Standing Conference of European Ministers of Education: Sixteenth Session. Resolution (1989) on The Information Society – a challenge for education policies? Reproduced in Seabright and Nickolmann (1992: 17-19).

<sup>47</sup> General Guidelines for drawing up a Community action programme on vocational training Adopted by Council on 26 July 1971 OJ C081 12 August 1971 p5-11.

resulted in a view of the future of educational technology which, while more sober, is also more realistic.' (Cerych and Neave, 1980: 226). A meeting of experts on distance education organised by CEPES in 1980 appears to have shared the same measured approach (Editors, 1983). One of the papers published in the special volume of *Higher Education in Europe* on distance education highlighted the potential of 'electronic means of communication' to provide education to dispersed populations, but warned that the existence of a well-developed technological infrastructure was a prerequisite for success (Rumble, 1983: 13). This concern with infrastructural deficiencies was shared by Coolahan in 1983 who commented on governmental inertia in planning communications and broadcasting networks as a possible 'dam' to the impact of the 'contemporary communications revolution on third level education up to 2000' (Coolahan, 1983: 173).

The concept of the Information Society was already in use in the early 1980s, when Barnett et al (1981) produced a report for the Commission on the contribution of education and training to the evolution of the Information Society. Interestingly, the report stressed that the most important issue in achieving the Information Society was psychological/behavioural rather than technological, and positive attitudes among the general public and students would determine the adoption of the new technologies (this is an issue which will be returned to in Chapter 10 on student attitudes to ICT in education). The report recommended that the Commission should take action to raise awareness and create positive attitudes to the new technologies by supporting experimental projects which could be coordinated either at European level, or through a network of agencies, or a large central agency. The report counselled that computers should not be used to do the 'same old things more efficiently' with a consequent loss of human contact (Barnett, et al., 1981: 155). Quite presciently, the authors forecast a return to home-based learning in the 1990s and an increase in community based continuing education. The report concluded that this was 'a major opportunity for the Commission to foster needs oriented projects and experiments involving differing strands...to create more synthesis and integration of known technological opportunities for specific purposes' (Barnett, et al., 1981: 152). Interestingly, this report did not associate distance education with the use of new technologies.

The Ministers of Education reviewed progress with the 1976 Action Plan at their meeting on 27 June 1980 but made little mention of NITs and none of distance education, other than to report that two meetings had been held with experts from the education ministries, under the auspices of the BBC to discuss the use of mass media for education of migrants (CEC, 1986: 46-60). However, NITs were firmly on the policy agenda of the meeting of Council and Ministers of Education in 22 June 1981, which agreed that

the introduction of new information technologies 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, with the Education Committee, 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 and by extending access to paid educational leave or other methods of enabling adults to acquire new skills (CEC, 1986: 74).

Growing concerns with mass unemployment led to calls for a new approach to educational planning in the early 1980s (CEC, 1982: 25; Nihoul, 1999: 91). This was signalled by the reshuffle of responsibilities within the Commission, referred to above, which brought

education services into DGV with responsibility for Employment and Social Affairs. This initiated a period where the links between education, training and employment were emphasised. A meeting of education ministers in April 1981 provided an economic rationale for the action programmes (COMETT, EUROTECNET) adopted in the mid 1980s since new information technologies were seen as ‘the catalyst for redrawing the map of education, training and employment’ (Nihoul, 1999: 128).

The Commission Document ‘An education policy for Europe’ also highlighted the role of NITs in education and training as a means of combating worsening employment, and competition with the USA and Japan in the technology sector (CEC, 1982: 25). This report echoed Barnett et al’s advice (1981) by acknowledging the importance of developing new aptitudes and behaviour patterns, at school level as well as vocational training; it was necessary to foster favourable attitudes towards acceptance of new technologies as well as awareness, while priority was to be given to teacher training. 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.<sup>48</sup>

1983 was a critical year: the crisis of unemployment, and the pace of technological change linked with training needs, instigated programmes aimed at upskilling and using the new technologies. Unemployment (especially youth unemployment) and vocational training were high on the agenda of the June 1983 Council meeting. The Education and Labour ministers of the ten Member States meeting together formally for the first time on 3 June 1983 made a commitment to providing some form of initial training to all school leavers.<sup>49</sup> Formal commitments to action on NITs in education and training were made at the same time, as will be seen in the next section.

#### **4.5.2.1 Resolutions On NITs 1983**

The NITs were to come on the political agenda with the adoption of the Council resolutions on NITs in education and vocational training in 1983. The resolution of 2 June 1983<sup>50</sup> made proposals for specific actions in NITs for vocational training, whereas the 11 July 1983<sup>51</sup> resolution proposed a series of more general measures in this area. Both of these resolutions stressed the impact of new technologies on employment and working life and the consequent need to prepare, particularly young people, to use and understand the new technologies, with an emphasis on the socially responsible use of these technologies. The resolution on NITs in education<sup>52</sup> supported the economic and employment related aspects of NITs but also stressed that education could make a contribution not only in mastering the technology in terms of working life but also ‘constitutes a means of development of an independent and creative personality’. The vocational training resolution set tasks for the Member State level as well as the Community level. At Member State level, action was to be directed towards SMEs, young unemployed people, women, qualifications, and awareness raising. Actions and measures at

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<sup>48</sup> OJ C 87 5 April 1982.

<sup>49</sup> Conclusions of the joint session of the Council (Labour and Social Affairs)/Council and the Ministers for Education meeting within the Council of 3 June 1983 on the transition of young people from education to adult and working life (CEC, 1986: 93-94).

<sup>50</sup> Council Resolution of 2 June 1983 concerning vocational training measures relating to new information technologies OJ C 166 25 June 1983.

<sup>51</sup> Council Resolution of 11 July 1983 concerning vocational training policies in the European community in the 1980s OJ C 193 20 July 1983.

<sup>52</sup> Resolution of the Council and of the Ministers for Education Meeting within the Council of 19 September 1983 on measures relating to the introduction of new information technology in education OJ C 256 24 September 1983.

Community level included the usual demonstration projects; exchanges of ideas and expertise; and exchanges of trainers. The education resolution specifies four initiatives to be implemented by 31 December 1987: 1) meetings, seminars, symposia on aspects of IT, mainly in schools, although advanced training was mentioned; 2) a programme of exchanges and visits for teachers; 3) comparative studies on transferability of software and teaching programmes; and 4) exchange of information and experience using Eurydice. These actions and measures tended to focus largely on youth unemployment, whereas the recognition of the needs of adults and lifelong learning came somewhat later.

#### **4.5.2.2 Commission Follow-Up To Resolutions On NITS 1983-1987**

The Commission followed up the Council decisions by organising or supporting a series of meetings throughout Europe.<sup>53</sup> A Summer University on NIT and primary school education took place in Liege in July 1985; symposia on NIT in secondary schools took place in Marseilles (December 1983), Newcastle (July 1984), Bologna (May 1985), and Berlin (November 1985). A 'Youth and New Technologies Week' took place on 8-13 July 1985 in Turin at which 150 young people, nominated by the Ministries of Education in each Member State, were exposed to developments in information technology in the industrial sector. The symposia were attended by representatives of the Ministries and senior civil servants, as well as teacher trainers and educational specialists and provided an opportunity to review progress on introducing NITs in schools throughout the Member States, to discuss the issues involved in introducing NITs, and to define common strategies for teacher training, data exchange and the evaluation of software (CEC, 1987b). A further symposium on the need for cooperation in developing courseware was held in Enschede in May (CEC, 1987b: 31). It is interesting to read the Commission's view of its role in stimulating Member States to respond to the challenge of NITs in education. Citing the symposium organised by the French government in Marseille on 7-9 December 1983 the Commission wrote:

Until then, the Member States had been left to their own devices and had to withstand the initial onslaught of NIT on their own. Today we can see that the Marseilles symposium was, thanks to the Commission, the Member States' rude awakening to the importance of NIT and of the extent to which Europe was lagging behind both technically and culturally at that stage (CEC, 1989: 26).

However, a word of warning was sounded at the 'Summer University' in Liege in July 1985. Forty research specialists from the Member States discussed a wide range of issues relating to information technologies in the primary schools and expressed concerns with the many unanswered questions about technology in education querying 'How can a policy be rationally based without doing rigorous experiments?' (Osterrieth, 1986: 16). While acknowledging that such research was unlikely due to funding and infrastructural constraints, nevertheless, participants warned that due to the potential impact of technology on society 'blindly launching reforms that concern the entire educational system would be almost irresponsible' (Osterrieth, 1986: 16).

In 1984, the Ministers for Education<sup>54</sup> reviewed the progress which had been made in implementing the 1983 resolutions on NITs and requested that forthcoming meetings and seminars to be held in the framework of the actions should take into account three priority areas: 1) the training of teachers; 2) the development of software and hardware; and 3) educational activities and research, requesting that special attention should be paid to

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<sup>53</sup> Social Europe: Recent progress made in introducing new information technologies into education Supplement 4/86 Luxembourg: CEC.

<sup>54</sup> Conclusions of the Ministers for Education Meeting within the Council of 4 June 1984 (CEC, 1986: 111-125).

‘assisting the handicapped and to home study courses for which the NIT is providing the basic tools’ (CEC, 1986: 114). The use of NITs in the context of language learning was specifically emphasised (CEC, 1986: 118). Among the measures aimed at combating illiteracy, distance education using television networks was recommended (CEC, 1986: 124).

The Commission adopted a formal workplan to implement the Ministerial resolutions on 14 December 1984.<sup>55</sup> The workplan laid down areas in which the Community should intervene; specified how the programme should be implemented; provided for specific NIT information networks to be established; suggested closer collaboration with international organisations, and identified four main strategic topics: 1) introduction of NIT in teaching methods and curricula; 2) training for teachers and teacher trainers; 3) software, courseware and hardware systems; and 4) economic aspects and development strategies. The November 1986 Council agreed a programme for 1987-88<sup>56</sup> focusing on four strategic areas: 1) incorporation of new information technologies in teaching practice and school curricula; 2) training of teachers and trainers; 3) software, hardware and courseware systems; and 4) economic implications of NITs in education and development strategies (CEC, 1989: 27)

By 1987, the Social Europe supplement reported on the ‘spectacular development 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, 1987b). Clearly the Member States had taken on board the need to make a coordinated effort to introduce NITs in schools. However, activity at higher education level appeared not to feature on the national agendas, and there was no reference to distance education or adult education in this report.

Cerych carried out a report on higher education, industry and the NITs on behalf of the EEC in 1984 which presented some ideas on how the Commission might tackle higher education (Cerych, 1985). He noted that the adoption of the ESPRIT<sup>57</sup> programme in 1984 was a significant step ‘in providing the answer to the challenge posed by the information technologies to all modern societies’ (Cerych, 1985: 6). He proposed a number of responsibilities for higher education: 1) training to use NITs; 2) using NITs as a learning resource and tool; 3) enhancing the role of higher education in research, 4) pilot experiments; 5) training of teachers to introduce NITs in schools; 6) research on the relation between the development of NITs and social behaviour and 7) research leading to better understanding of the ‘informatization’ of society. The NITs would impact on higher education as a new discipline to be taught, but also modifying structures of other programmes (Cerych, 1985: 7). He concluded that

One of the great tasks and responsibilities of universities vis-à-vis the global challenge posed by the NITs is precisely the contributions which they are called on to make with reference to these choices and preferences through a better knowledge and understanding of the multiple interactions which condition the development, assimilation or rejection of technology by society (Cerych, 1985: 12).

In all of the developments discussed above, the emphasis was on initial education and the needs of adult students and lifelong learners, and, indeed, the potential of distance education rarely featured. References to distance education tended to be fleeting, for example, it was mentioned in the context of disability, illiteracy and language learning in the conclusions of

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<sup>55</sup> Commission Workplan 14 December 1984 Com/84/722 Final.

<sup>56</sup> COM(84) 722 Final/ OJ C 256 24 September 1983.

<sup>57</sup> European strategic programme for research and development in information technology 1984-1994.



the Council of Ministers in Education on 4 June 1984<sup>58</sup> (CEC, 1986: 111-125). The next section will focus on the appearance of distance education on the policy agenda in the 1980s.

#### **4.5.3 DISTANCE EDUCATION REACHES THE POLICY WINDOW 1985-1987**

It is clear from the discussion above, that the distance education and the NIT streams appeared to be separated in Commission thinking up to 1985, with most attention being paid to NIT in initial education. As one interviewee commented ‘there was a lot of ignorance in the Commission about distance education at that time’<sup>59</sup> despite the significant strides which distance education institutions had made during the period in question. Distance education occupied a peripheral status, if any, in the policy documents. However, the events of 1985 would appear to have coincided with the opening of the policy window for distance education, starting with the arrival of Delors in the Commission on the 1<sup>st</sup> January 1985. Delors recognised that emphasis should be put on new technology, research and new industries and allocated Peter Sutherland the education dossier for one year. Sutherland had deep respect for Delors

I believe Jacques Delors was a person who had an intellectual understanding of the absolute need for greater European integration and he had the intellectual capacity to link the specific achievement of specific pragmatic goals to the development of the legal capacities to achieve those goals.<sup>60</sup>

Corbett (2000: 143) comments that Sutherland was ambitious and entrepreneurial and willing to listen to his cabinet’s argument that he could do for education and training what Davignon had done for technology, by supporting the proposed Commission programmes – COMETT (designed to increase links between higher education and industry using the new technologies) and ERASMUS (aimed at promoting transnational mobility of students and academics in higher education and the development of interuniversity projects).

Chapter 8 will deal more fully with the Commission implementation programmes, however, it is important to note that the introduction of the four major action programmes in this period (EUROTECNET, COMETT, ERASMUS, and DELTA) while not specifically targeted at distance education, nevertheless were the catalyst for the formation of networks of distance education institutions aimed at bidding for funding under these programmes, and which helped in no small part to raise the profile of distance education in the European Union.

One event which stimulated Commission interest in distance education was a study tour<sup>61</sup> to the USA organised by the large electronics companies, during which representatives from the Commission and MEP Edward McMillan Scott, as well as academics from universities in Europe investigated the use of satellite-delivered instruction. A proposal emerged from this study tour for a European cooperative action project PACE (Programme for Advanced Continuing Education) to draw on the experience of the US National Technological University (NTU) (Cerych, 1986). During this study visit the group went to IBM in White Plains and Hewlett Packard in Palo Alto, looking at remote laboratories, and demonstrations from Stanford University of tutored video instruction (TVI) using satellite broadcasting. In the view of one participant, this study tour was an attempt by industry to persuade the Commission to go for a satellite delivered option.<sup>62</sup> The NTU wanted to broadcast into

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<sup>58</sup> Conclusions of the Ministers for Education Meeting within the Council of 4 June 1984.

<sup>59</sup> Interview with Glyn Martin, Former President of Saturn 26 September 2003.

<sup>60</sup> Peter Sutherland interview recorded in 1998; available at European University Institute EU Oral Archive <http://www.arc.iue.it/oh/oralhistory.html> accessed 20 January 2004.

<sup>61</sup> The Joint Europe/USA Continuing Education Forum, 14-24 September 1986.

<sup>62</sup> Interview with Glyn Martin, Former President of Saturn 26 September 2003.



Europe but was prevented from doing so by restrictive national broadcasting regulations. The establishment of what became EuroPACE (European Programme for Advanced Continuing Education) was seen as a way of getting around these regulations. The objective was to 'provide advanced continuing education to industry on a European scale via satellite and other suitable modern means' (Cerych, 1986). According to Cerych,

the Joint Europe/USA Forum ...was not merely an interesting and valuable event in its own right, but the starting point for a new long-term European cooperative effort in the field of advanced continuing education at the service of technological and social progress - a venture which may also usefully supplement major new European programmes such as Eureka and the EEC's COMETT, DELTA, ESPRIT (Cerych, 1986: 2).

This study tour was also to stimulate the foundation of SATURN one of the distance education networks which were to influence subsequent EU policy in distance education.

According to de Vocht<sup>63</sup> (1992: 15), the importance of distance education for the European Community was first recognised by the European Parliament when it adopted a resolution on the Open Universities on 10 July 1987. As we have seen, the idea of some form of a European Open University had been mooted in a number of venues following the establishment of the UKOU. This Parliamentary resolution was based on a report on Open Universities in the European Communities, drawn up on behalf of the Committee on Youth, Culture, Education, Information and Sport, by MEP Mrs Winifred Ewing (Ewing Report, 1987). The stimulus for this report lay in two parliamentary motions on open universities (OUs) in Europe. The first motion in June 1985 was on 'Open Universities in the European Community'<sup>64</sup> and the second 'The cultural and social functions of the 'open universities' in the European Community'<sup>65</sup> was tabled in January 1986. Because of their importance in stimulating the subsequent flurry of policy-making in distance education, the content of the motions, the Ewing report and the Parliamentary Resolution will be analysed in some detail in the next sections.

#### **4.5.3.1 European Parliamentary Motions On OUs 1985 And 1986**

It is interesting to note that both of the Parliamentary motions on OUs dwelt on the contributions which OUs might make to the cultural as well as the economic development of the EU. Both referred positively to the role which OUs could play in promoting European culture, retraining, and extending access and called on the Commission to take action to encourage the establishment of OUs in Member States where they did not exist; promote cooperation between existing OUs, especially with regard to harmonising and coordinating curricula and qualifications; and support the use of new technologies; as well as allocating funding for adult education and open universities at European level.

The 1985 motion focused more on cultural perspectives, stating that the objectives of European cultural policy required the provision of education and training to people of all ages. It mentioned the importance in various EEC countries of open universities and other

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<sup>63</sup> Coen de Vocht was seconded from the OUNL to the Task Force in the Commission from 1990-1993. Interview 29 September 2003.

<sup>64</sup> Motion for a resolution on open universities in the European Community tabled by Mr Ciancaglini, Mr Borgo, Mr F Pisoni, Mr Parodi, Mr Gaibisso, Mr Guimarry and Mr Selva. European Parliament Working Document B2-587/85 21 June 1985.

<sup>65</sup> Motion for a resolution on the cultural and social functions of 'open universities' in the European Community tabled by Mr VandeMeulebroucke and Mr Kuijpers B 2-1515/85 27 January 1986.

forms of adult education and correspondence courses, and pointed out that open universities might play a part in helping people who wish 'to keep up their cultural interests by spending their time on stimulating and creative teaching and learning activities'. The resolution stressed the need for recognition of open universities at European level (para 1) pointing out that distance education could play a part in spreading awareness of European culture and community, and the functions of the Community institutions, thus furthering the integration process (para 2). The resolution then called on the Commission to carry out a range of specific activities:

- Carry out a census of open universities in Europe and of confederations of such institutions existing at national and European level.
- Establish a permanent dialogue with these universities in the interests of coordinating syllabuses and the exchange of experience and activities between such institutions.
- Encourage the inclusion, among the subjects taught, of the history, functioning, and organisation of the European Communities and their institutions.
- Guarantee specific assistance in the choice of teaching programmes and methods which also use the new technologies.
- Draw up proposals for the harmonisation of degrees and diplomas issued by such institutions and their recognition as qualifications at European level.
- Allocate budgetary resources for adult education, open universities and coordination between these universities at European level.

As will be seen, these proposed activities strongly influenced the list of proposals in the 1987 resolution.

The second motion also referred to the need for Community action in the cultural sector but more strongly expressed the need for Commission action in supporting the OU model. Apparently, the question of open universities in the Community had been discussed in the European Parliament previously, since the resolution mentions a response to a written question no 1247/85 where it had emerged that an OU system existed in all Member States, with the exception of Belgium, Luxembourg and Greece. The resolution noted that the 'term 'open university' signifies an education system which is 'open to all', with minimal or non-existent entrance requirements, in which students are given the freedom to decide on the pace of study and to select a programme of studies individually tailored to their own requirements. It should be pointed out that this definition is not typical of all OUs in Europe and most closely fits the UK and Dutch OU systems. The influence of the UKOU on the thinking behind this resolution is underlined by mention of the International Centre for Distance Learning (ICDL) located in OKOU, 'which is currently fulfilling a central function in stimulating cooperation between existing and developing 'open university' schemes in other countries'. The resolution requested the Commission to draw up proposals for the establishment of OUs where none are present, and on 'more intensive cooperation between such open universities as do exist'. It highlighted the social rationale of distance education in its call on Member States

which do not yet have an open university to take the necessary measures to introduce one and to organise cooperation between regions which share a common language, in particular with a view to promoting interregional and cross-border cultural cooperation between the members states [and] to securing the best possible open university education facilities, thereby enabling as many people as possible, a large number of whom have, for social reasons, been unable to obtain the qualifications necessary for admission to higher education, to receive suitable instruction leading to such qualifications.<sup>66</sup>

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<sup>66</sup> Motion for a resolution on the cultural and social functions of 'open universities' in the European Community tabled by Mr VandeMeulebroucke and Mr Kuijpers B 2-1515/85 27 January 1986.

#### 4.5.3.2 The Ewing Report 1987

The European Parliament referred the motions discussed above to the Committee on Youth, Culture, Education, Information and Sport, which decided at its meeting on 20 September 1985 to draw up a report. Mrs Winifred Ewing, a Scottish MEP was appointed on 30 January 1986 to act as Rapporteur. A draft of what became known as the 'Ewing report' was circulated to a number of organisations in September 1986<sup>67</sup> (Ewing Report, 1987). It is clear from the Report that the OUs had established a position of some influence, having clearly managed to persuade the Committee of the potential of the OUs for meeting a range of EU objectives in education and training. The Report referred to the four OUs in existence at that time, the UK Open University (OUUK), the Spanish Open University (UNED), the German FernUniversität (FernU) and the Dutch Open Universiteit (OUNL), as well as to two proposed open universities, the Consorzio per l'università a Distanza (CUD) in Italy and the Instituto Português de Ensino a Distância in Portugal which became the Universidade Aberta (UA) in 1991. The explanatory statement attached to the proposal mentions a number of other institutions providing distance teaching for adults, but which were not regarded as 'fully fledged open universities'. These are not referred to further and the report acknowledges that it draws 'preponderantly on the British example as the oldest, largest and best documented' (p6). Again, the Report emphasises the social goals of the Open University which were 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 (p8)

The report outlines what is effectively the UKOU model, comprising openness with regard to entry qualifications, course choice and part-time mode of study. It also comments on the multi-media approach combining printed materials, television and radio broadcasts, audio and video cassettes, science and technology kits, supplemented by face to face tutorials, stating that the UKOU has been at the forefront of the application of IT to distance education. The report comments on the fact that UKOU students are required to pay fees because of government policy towards part-time students. The report concludes that the UKOU has 'established its credibility' as evidenced by rising numbers of enrolments and graduates, although acknowledging that there are still 'those who consider OU degrees inferior to the degrees of conventional universities' (p12). The report then discusses the role of the OUs and the European Community, noting that the OUs already provide courses for their respective country's nationals living abroad. The report expresses reservations about the practice of charging differential fees to non-nationals which might not be compatible with Treaty of Rome provisions. The report sees OU cooperation as fitting in with the broader higher education cooperation frameworks, noting that the future of European economies lies with the knowledge-based industries, and thus with education, and the Community should not 'let slip the opportunity to promote, coordinate and consolidate' OU initiatives (p17).

In the context of collection and dissemination of information, it is interesting to note that the Rapporteur was aware that a meeting of representatives of the existing and proposed OUs in eight Member States was to take place in October 1986, with UKOU and Commission support, which aimed to 'report on the latest developments' and identify areas and ways in which the OUs could work together' (p15). This meeting led to the formation of the European Association of Distance Teaching Universities in 1987.<sup>68</sup>

<sup>67</sup> The author has a copy of the report circulated to the ICDL in the UKOU dated 29 September 1986.

<sup>68</sup> The preliminary organisational meeting was held on 23 October 1986; the first formal meeting of EADTU took place on 23 January 1987. EADTU Annual Report 1987.

With regard to the participation of OUs in Community action programmes, there appears to have been some doubts as to whether OUs were entitled to participate, although the report seeks to support in no uncertain terms their participation. It points out that three OUs were already cooperating under ERASMUS in the joint production of learning materials, and recommended that OUs should be involved from the start in the new programmes, COMETT and DELTA.

Interestingly, although there are no formal proposals with regard to broadcasting, the report notes that the Community was working with the European Broadcasting Union on the feasibility of a European educational television channel, noting that until video recorders 'are within the financial reach of all' the OUs will be required to rely on broadcasting (p16).

One of the most significant proposals to emerge from the Report was the establishment of a European Open University, since it was this proposal which galvanised the European Association of Distance Teaching Universities (EADTU) into action. It is also interesting to note that the Report provides no justification for the establishment of such an institution, and no indication of what precise form or purpose it should serve, merely stating that the concept has appeal and its feasibility deserves to be investigated. Reference was made to existing proposals in 'certain quarters', citing the Van Schalkwijk (1979) paper to a UKOU Conference on the Education of Adults at a Distance held in 1979. In this paper, Van Schalkwijk had mooted the possibility of the European Open University as a means of harnessing the potential of the multi-media for distance education (Van Schalkwijk, 1979). It is worth summarising the proposals in this paper since the Ewing report provides so little detail of what was envisaged. Van Schalkwijk (1979: 12-13) appeared to envisage a transnational institution aimed at delivering courses, and outlined four phases of development: 1) an inventory of programmes and a report on technical developments; 2) a report on funding and finance; 3) experimentation with multi-media packages; and 4) development and co-production of programmes. He noted that parallel studies would be required to look at the form of organisation and coordination of training courses, texts, examinations, and certification. While he makes no reference to a possible role for the EU, this document represents a good exemplar of the way in which ideas can float in the policy 'soup' for some time before being picked up, as this one was in the Ewing report of 1987. It is also interesting to note that the more specific proposals adopted by the Council of Europe in 1971 on the European Television University were not referred to although they must certainly have had a wider circulation than that of a conference paper.

#### **4.5.3.3 The Resolution On Open Universities 1987**

Following a debate on the Ewing Report, the European Parliament agreed a Resolution on Open Universities in the European Community on 10 July 1987.<sup>69</sup> It is interesting to note the extent to which the final resolution echoed the draft resolution in the Ewing Report, although some minor amendments, additions and omissions emerged during the discussion and consultation phase before the resolution was debated in the Parliament. Broadly speaking the

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<sup>69</sup> European Parliament Resolution of 10 July 1987 on Open Universities in the European Community Session Doc A2-0069/87 OJ 0133. This resolution cited earlier motions by Mr Ciancaglini and others (DOC B 2-587/85), by Mr Vandemeulebroucke and Mr Kuijpers (Doc. B 2-1515/85); a resolution tabled by Mr Pedini, Mr Sutra de Germa and others on the Open University (Doc 1-759/82); a resolution of 13 March 1982 on radio and television broadcasting in EC (OJ C \*7 5.4.82 p110); on 10 October 1985 on the Green Paper on the establishment of a common market for broadcasting; the establishment of COMETT 15 November 1985 (OJ C 345 31/12/85, p416). The records show that seven MEPs spoke on the resolution: Ewing, Papakyriazis; Munch; Beazley; Pordea; Ciancaglini; Marin I. D0716.

resolution covered five areas: 1) the openness of the OUs could serve the need for adult education and training, especially among the disadvantaged; 2) the OUs could contribute to European integration by their potential to teach languages, but they should aim for a balance between humanities and sciences; 3) Member States were urged to support OUs and other ODL initiatives at Member State level; 4) obstacles and barriers to participation should be tackled including high fees and fee differentials, customs regulations on cross border distribution of course materials, and mutual recognition of qualifications; and 5) the Commission was called on to promote OUs through preparing reports, disseminating information, involving OUs in programmes such as COMETT, ERASMUS and DELTA, and investigating the feasibility of establishing a European Open University. The details of the resolution are summarised in Table 4.2 below. The most interesting features to note from the European Parliament resolution and report are both what they say and what they do not say:

- The positive view of OUs as a means of redressing disadvantage, with proposals on fee structures to facilitate participation and the focus on OUs as providers of education and training to adults could only serve to enhance the reputation of OUs and distance education as a legitimate form of education.
- Support for the involvement of OUs in EU programmes is further evidence of this positive regard.
- The stress on the need to teach a broad range of subjects, the humanities as well as science and technology is indicative of a less utilitarian view of education as serving merely economic interests.
- The need to remove obstacles to crossborder export of materials (mainly a concern of the UKOU at that time) and facilitate enrolment of non-nationals can be interpreted as moving education into the internal market.
- The importance of cooperation between institutions is stressed, but the removal of obstacles to enrolments is not connected with the possibility of inter-institutional competition.
- The lack of justification or elaboration of what is meant by a European Open University is striking, since it emerges as the key proposal around which opposition from the OUs was mounted.
- The omission of a proposal on the use of technology or any other methodology is surprising in view of contemporary emphasis on NITs and education.
- The resolution fails to refer to the possibility of dual-mode institutions being supported by the EU and appears to see distance education as being the preserve solely of the OUs.
- The report does not envisage the possibility of extending distance education methodologies to the traditional higher education system.



**Table 4.2: Summary Of The Resolution On Open Universities 1987**

1) Extending access: OUs serve the need for adult education and training; especially among the disadvantaged; the openness of OUs is an advantage	<ul style="list-style-type: none"> <li>• New forms of higher education and training needed for adults not able or wishing to study on a full-time basis; adults constitute a growing cohort of population; rapid obsolescence of knowledge and skills.</li> <li>• OUs are major providers of part-time higher education and training to adults of all ages and backgrounds; also providers of continuing education; 'Providers of continuing education' had been added in Final resolution.</li> <li>• OUs urged to cater for women, disadvantaged, handicapped, prisoners. The resolution is more restricted than the draft which called on 'open universities to intensify their efforts, for instance by means of focused publicity campaigns and financial support, to recruit students among the young unemployed, migrant communities, women, the handicapped, and those most isolated from conventional centres of learning, and urges allocation of aid for this purpose under the European regional and social funds.'</li> <li>• Item 3 'strongly supports the openness of open universities as reflected in the absence of age and entry qualifications, the choice between full time and part time study and the choice of study programmes. This was mentioned in the explanatory statement but not in the draft resolution.'</li> </ul>
2) Balance of subject areas: Potential to teach languages, but aim for a balance between humanities and sciences	<ul style="list-style-type: none"> <li>• Community support for initiatives involving OUs teaching common language groups across regions is suggested; the terms are more restricted than in draft. Item 6. Notes with approval the provision of OU teaching to speakers of the home countries language living abroad, as well as proposals for shared OU facilities between regions with a common language and suggests that the Community support such initiatives; Item 10. Urges open universities where they do not already do so, to provide courses on the European Community and on its languages, and recommends that Community support be made available to this end.</li> <li>• Item 18 urges open universities not to emphasise natural science subjects at the expense of human and social sciences, but rather to aim for a balance and greater cooperation between these disciplines. This was not mentioned in draft proposals although mentioned in the explanatory statement.</li> </ul>
3) Urges support for OUs and other ODL initiatives at Member State level	<ul style="list-style-type: none"> <li>• Item 4 urges Member States where no OU exists to encourage the setting up of such an institution.</li> <li>• The following Item 3 from the draft resolution was omitted: Urges Members where Open Universities have already been established to acknowledge their growing importance, notably by maintaining public funding at levels which take full account of inflation.</li> <li>• Urges national and regional authorities to cooperate with initiatives involving the Open University. This was not mentioned in the draft.</li> <li>• Advocates cooperation and interchange at Open University level. This was not mentioned in draft.</li> <li>• Member States urged to monitor progress of UK Open College; Notes private open college in Germany offering commercial engineering and data processing qualifications. This was not mentioned in draft.</li> </ul>



4) Remove barriers and obstacles; fees, distribution of materials	<ul style="list-style-type: none"> <li>• Urges assistance to neediest students. More restricted than in draft. Item 4 &amp; Item 5 further recommends that Member States extend systems of mandatory grants for higher education to cover part-time study.</li> <li>• Calls on fees to comply with EEC treaty provisions prohibiting discrimination on grounds of nationality.</li> <li>• Calls for mutual recognition; more restricted than draft Item 11: urges mutual recognition and transferability of course credits between OUs and conventional higher education establishments at both national and European level.</li> <li>• Calls for free circulation of OU materials across borders; more restricted than draft Item 8 Calls on Member States to ensure free circulation across internal Community borders of OU learning materials, including science and technology experiment kits, subject to reasonable security checks.</li> </ul>
5) Commission to promote Open Universities	<ul style="list-style-type: none"> <li>• Calls on the Commission to promote open university systems at the European level; to collect information through Eurydice.</li> <li>• To prepare a report on planned and existing OUs.</li> <li>• To ensure that OUs are involved so far as possible in Community schemes in the field of higher education and training, notably ERASMUS and COMETT; and in development of advanced open learning at the European level, especially through DELTA.</li> <li>• Investigate the feasibility of creating a European Open University.</li> <li>• Calls on Member States to forward this resolution and the report of its committee to the Council, the Commission, the Governments of the Member States, the European Broadcasting Union, and the heads of open universities.</li> </ul>

As was mentioned above, the proposal to set up a European Open University galvanised the European Association of Distance Teaching Universities (EADTU) to lobby successfully against the idea. Corbett describes a similar successful attempt by CRE (the Association of European Rectors) in the 1950s and 60s to undermine the proposals for the establishment of a European university institute.

They were favourable to the kind of contacts which would further the circulation of ideas, and they considered themselves to be European institutions. But an EC-created university risked breaching the principle of intellectual autonomy which rectors in several countries had fought so hard to establish after their experience of Nazi or Fascist regimes. The diversion of resources from national systems, which the European University would require, was also a point of contention (Corbett, 2003a: 5).

Similar arguments (although no references to experiences under fascism) were used by EADTU in defending its members' autonomy. Chapter 5 will return to this issue.

## 4.6 SUMMARY

This chapter has attempted to describe and explain the relatively tortuous process of agenda-setting which culminated in the opening of the 'policy window' which admitted distance education as a key instrument in EU education and training policy in the 1990s. Kingdon's agenda-setting framework, involving the interaction of policy streams and problem streams within the context of a political stream has provided a helpful guide to mapping the complex series of events over a thirty-year period. The main developments in this period are summarised in Table 4.3 below. As this chapter has shown, the 'problem stream' which faced the EU from its inception in 1957, started with a severe crisis of unemployment throughout the then six member community, arising from dramatic advances in technological development and declining industries. The oil shocks of the 1970s served only to increase

pressures on economies through widespread recessions. During this period, there was widespread concern with what was seen as chronic youth unemployment, and obsolescence of skills.

Later problems which emerged were concerns with completion of the Internal Market as a means of combating increasing global competition, in particular from Japan and the USA. The need to overcome disparities in levels of technological development between Europe and its global competitors was a driver of many EU policies in the area of research, industrial development, as well as education and training. There was also growing recognition of the need to create a European identity among its citizens if the European Union was to obtain the political support needed to complete the integration project.

From as early as 1961, the policy stream turned to the education and training system to solve the issues emerging in the problem stream through training workers and providing training in new skills. The political context, however, provided significant obstacles to EU involvement in education policy because of the principle of subsidiarity and the weak legislative basis for action in this area. The Commission was required to work slowly and carefully, building up 'soft law' through a series of initiatives and action programmes. The first programmes were relatively anodyne measures involving vocational training, and comprising studies, exchanges, and joint projects. While distance education began to emerge in the 1960s as an instrument at national level to tackle the problems of disadvantage and access to higher education, it was not until the mid 1980s that anything other than token recognition of its potential at European level was given. However, in parallel with developments in distance education, the new information technologies were making inroads in initial education, particularly at school level. This was no doubt greatly assisted in the early 1980s with the introduction of personal computers and reducing costs.

Between 1978 and 1987 the Commission instituted a significant programme of policies and initiatives in NITs culminating in the COMETT, ERASMUS, DELTA and EUROTECNET programmes. While it is clear that the prospect of funding under these programmes attracted distance education institutions to cooperate in networks, nevertheless, political developments in the 1980s helped to open the policy window for distance education. The pressures of the completion of the internal market called for new approaches to lifelong learning and preparations for the Information Society which it was widely acknowledged could not be met by traditional forms of education. Distance education had transformed itself into a flexible, high quality mode of education; it was open to using technologies to deliver course content and interaction between its students; and it could potentially provide the vehicle to deliver lifelong learning throughout Europe in (it was hoped) a cost and pedagogically effective way. The European Parliament resolution on Open Universities was the catalyst which enabled the Commission to initiate investigations on the potential of distance education, and which led to the EU committing itself to 'encouraging the development of distance education' in the draft Maastricht Treaty in 1991. The policy window had opened and ODL stepped in. The next chapter will examine what happened to ODL after the policy window had opened.

**Table 4.3: ODL Arrives On The EU Agenda: Summary**

Date	The ‘Problem Stream’ – Technology And Economic Context	Distance Education Stream	EU Policy Stream
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
1985-1987	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.

## **Chapter 5: ODL Policy in the EU: The Policy Window Opens 1987-1993**

### **5.1 INTRODUCTION**

The previous chapter outlined in some detail the process through which distance education emerged on to the EU policy agenda. Briefly, the EU came to see education as the solution to a number of problems facing the Community in the late 1980s; these included the need to retrain workers in the context of the Information Society and changing technological development; to increase participation in education and training in preparation for the completion of the internal market in 1992; and to contribute to the creation of a European sense of identity. Distance education was seen as the key to meeting the demand for increased access to education and training in Europe because of its flexibility, and its increasing acceptance as a legitimate and quality approach to learning. It was acknowledged that the traditional system was unable or unwilling to provide this kind of flexibility at the time.

This chapter outlines the course of development of distance education policy in Europe, after the policy window opened in 1987 with the European Parliament resolution on open universities.<sup>70</sup> Kingdon states baldly that a policy window 'closes quickly. Opportunities come, but they also pass. If a chance is missed, another must be awaited' (Kingdon, 1995: 195). However, other writers have suggested that policy windows can actually stay open for some years (Barzelay, 1998: 12). In his study of New Public Management (NPM) policies in the UK, Barzelay found that the problem of public sector inefficiency and various attempts at a solution based on NPM generated a stream of proposals which were adopted by the UK government over a number of years. 'The policy window remained open in part because policy alternatives flowed in, which in turn kept the policy window open' (Barzelay, 1998:12-13). This chapter suggests that the policy window for ODL remained open from 1987 to the end of 1993; the European Parliament resolution opened the window in 1987; the window remained open as a series of policy papers and reports and the insertion of a commitment to 'encouraging the development of distance education' in article 126 of the Maastricht Treaty kept the debate alive. By the end of 1993, the policy window was closing as the Commission worked on its action plan to implement its new competencies in education and training sector.

The two years following the Treaty might be characterised as a period of attempts to embed the policies in a series of actions and initiatives. However, around 1993, the focus shifted, with the emergence or re-emergence of problems to which distance education became attached as a partial solution: these included the problems of global competitiveness; the Information Society; Lifelong Learning; enlargement of the EU; and problems of governance. The key policy events during the period 1993-1999 included the publication of the Delors White Paper on Growth, Competitiveness and Employment (CEC, 1993c) the Bangemann Report on the Information Society (CEC, 1994); the White Paper on Teaching and Learning (CEC, 1995b); the Year of Lifelong Learning in 1996; the Agenda 2000 strategy in 1997; and moves towards mainstreaming education and training policies in Community policies between 1997 and 1999 (Hingel, 2001).

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<sup>70</sup> 1987 Resolution on open universities in the European Community OJ 0133 Session document A2-0069/87 debated 10 July 1987.

From 2000 onwards, there was a notable shift in EU policy in education and training. The Lisbon agenda incorporated education and training as one of the main instruments in achieving the

strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion.<sup>71</sup>

This chapter will start by setting the economic and technological context between 1987 and 2004, which contributed to the definition of problems affecting the EU. The next section will outline the developments in distance education in the same period. The major milestones and events in EU policy-making in ODL may be divided into four periods: The policy window opens 1987-1991; The policy window closes 1992-1993; expansion in the problem and policy streams 1994-1999; mainstreaming ODL 2000-2004. This chapter will outline the developments during the first two periods. Developments between 1994 and 2004 will be discussed in Chapter 6. During the 1990s, ODL became more and more identified with the use of technology in education and training, to the extent that the term ODL fell out of favour and was replaced by 'elearning' in EU policy documents. Following the Lisbon meeting in 2000, eLearning was to be 'mainstreamed' in all forms of education and training. The impact of this development on ODL will be discussed in Chapter 6.

## **5.2 THE POLITICAL AND TECHNOLOGICAL CONTEXT 1987-2004**

Between September and December 1989, the communist governments in Eastern Europe collapsed, starting with Poland and ending with Romania. The break up of the USSR started in August 1991. These events led to a reorientation of EU policy to the East, initially through assistance programmes, and later to preparation for enlargement of the Community. The Gulf War in 1991 had a knock on effect on the European economy, disrupting growth rates and leading to a loss of consumer and business confidence in the Community (Charters d'Azevedo, 1991b: 6). At the same time the Information Society was about to take off. In 1990 in the US 2.8 million workers were employed in the telecommunications sector which was then worth \$350 billion (McIsaac and Gunawardena, 1996). The IRDAC report (1991: 23) warned that information technology, including microelectronics, software applications and telecommunications, was at the heart of technological change sweeping through Europe and other industrialised nations. The pace of change posed enormous challenges for the education system not only to produce technologically literate citizens and highly skilled workers for the various branches of the technology sector, but also to provide continuing training for the existing workforce. The early 1990s were characterised by a convergence of telecommunications, through the adoption of international standards such as TCP/IP which allowed the delivery of digitised information through an ordinary telephone line to a desktop computer, in a range of formats: audio, video, graphic and data communications, with a consequent leap forward in the way in which distance learning could be delivered (McIsaac and Gunawardena, 1996). The first transatlantic fibre optic cable was laid in 1988 facilitating telematic networks linking computers on a global basis. Communications became easier with the widespread introduction of email when the first Internet Service Providers were established in 1989 (DiMaggio and Cohen, 2004). This development also stimulated the use of computer conferencing systems (e.g. COSY used by the UKOU) which allowed users to participate in group conferences.

The staff at CERN in Geneva led by Tim Berners Lee introduced the World Wide Web in 1991 and when browsers and search engines first became widely available in 1993, the

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<sup>71</sup> Presidency Conclusions: Lisbon European Council 23 and 24 March 2000 <http://ue.eu.int/newsroom/> accessed 12 March 2004.



potential for using the web as an educational resource and a tool became feasible (DiMaggio and Cohen, 2004). Microsoft released Windows version 3.0 in 1990, which greatly simplified the use of PCs for non-technologically literate individuals through pull-down menus, improved graphical user interfaces and wysiwyg (what you see is what you get – PC users were at last able to see on screen how their finished document would appear on the page). When Windows 95 was launched in 1995, over one million copies were sold in four days (Blackhurst and Edyburn, 2000). The mid 1990s saw the first moves towards deregulating telecommunications monopolies, leading to greater accessibility and falling prices for consumers and calls to implement the ‘Information Highway’. In 1995, Internet and commercial online usage had ‘exploded’ with 15m users and 8% US households linked to the Internet.<sup>72</sup> By 2001, 54% of Americans were online (Victory and Cooper, 2002) compared with 40.4% of EU citizens who had access to the Internet in June 2002.<sup>73</sup>

The main technological innovation, which was to transform ODL and educational technology, was one that had been least expected, although the potential had been around for some time. An earlier version of the Internet had been invented in 1969 but it was not until CERN developed the WorldWide Web in 1991 and the emergence of Internet browsers in the early 1990s that the Internet began to take off as the ‘killer technology’. The Internet is a ‘collection of independent academic, scientific, government and commercial networks providing electronic mail, and access to file servers with free software and millions of pages of text and graphic data’ while the WWW is a ‘distributed hypermedia environment’ which allows for linkages between the various databases on the internet (McIsaac and Gunawardena, 1996). The first browsers such as Netscape and Mosaic enabled users to search these databases, and to find, retrieve, and display documents from any part of the Internet (McIsaac and Gunawardena, 1996). The concept of the Information Superhighway, utilising a high speed electronic network to extend the capabilities of the Internet had already been promoted by the Clinton-Gore government in the United States in 1993 (McIsaac and Gunawardena, 1996). However, vast infrastructural investments were necessary including the development of fibre-optic infrastructures and telecommunications infrastructures.

During this period, the role of the CD-ROM as a storage device for course materials increased in importance as more and more PCs came with a standard installation of a CD-ROM drive. In 1996, McIsaac noted that some 4000 CD-ROM titles were listed in media directories (McIsaac and Gunawardena, 1996). Among the other technological developments which were likely to impact on education and training were virtual reality, particularly where training in real life situations would be dangerous or inordinately expensive, for example in medicine or military manoeuvres. However, virtual reality remains probably too expensive for most applications.

In parallel with the increasing recognition of the potential of the Internet and related developments to transform all aspects of society, government, business, industry, health, entertainment and education, the realisation also dawned that such developments required universal access to the Internet technologies. This has led to concerns with the digital divide and pressure on governments to institute policies to implement the Information Society through a series of measures relating to infrastructural and pricing regulations. In 1998 UNESCO hailed the potential of the rapid developments in technology to improve the ways in which knowledge could be produced, managed, disseminated, accessed and controlled; however, it warned that equitable access to these technologies should be ensured at all levels

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<sup>72</sup> Consumer Electronics Association. Digital America  
[http://www.ce.org/publications/digital\\_america/chronology](http://www.ce.org/publications/digital_america/chronology)

<sup>73</sup> Eurobarometer Survey 2002



of education systems (UNESCO, 1998). McIsaac pointed out that the Internet was funded by governments with on-campus students accessing the Internet free of charge. The role of commercial interests in supplying Internet access was regarded as likely to change this scenario (McIsaac and Gunawardena, 1996). Some enthusiasm for technology was dampened by the dot.com collapse in 2000 when many high profile technology companies made significant losses on the stock market. Meanwhile, recent developments in technology have concentrated on the potential of mobile and wireless technology. While the future directions of technology are always difficult to predict, it is clear that the concept of the Information Society has been embraced by governments throughout the world as the keystone for future economic development. Chapter 8 will probe this issue in greater detail.

The next section will review developments in distance education during the period under review. As will be seen, the development of distance education was very much affected by parallel developments in technology, as well as political developments in the wider world.

### 5.3 DEVELOPMENTS IN DISTANCE EDUCATION 1987-2004

Distance education in Europe expanded significantly between 1987 and 2004, with all Member States, with the exception of Luxembourg, having adopted some form of publicly funded distance higher education activity. In the late 1980s, a number of international networks of distance education institutions emerged, including the EADTU, SATURN, EUROPACE, and EUROSTEP, often with the active support of the Commission. The establishment of a suite of Commission action programmes both stimulated and supported the development of these networks which participated in a wide range of projects designed to test out the most up to date teaching and learning technologies and infrastructures. At the same time, the networks played an important role in lobbying the Commission, while also acting as an instrument of Commission policy. The Head of Unit responsible for distance education, Ricardo Charters d'Azevedo wrote in 1993 that the EADTU had provided in the previous five years

a strong lobby to the Community institutions in favour of open and distance learning, but it has also demonstrated itself to be a loyal and reliable partner in Community programmes and activities in the field of education and training.<sup>74</sup>

The period was characterised by many international conferences, seminars and workshops, often jointly funded by the networks and the Commission, aimed at spreading awareness of the potential of open distance learning as well as the role of technologies in facilitating this development.

As the completion of the single market in 1992 drew closer, a number of the larger open universities began to see opportunities in the wider European market, which was to cause some concerns, particularly among the smaller systems. There was much debate about the direction ODL institutions would adopt with regard to the transnational education market: would the strategies adopted be based on cooperation, competition, or both? (Bates, 1990b: 20; Tribolet, 1992). EADTU had managed to persuade the Commission that the European Open University, proposed by the European Parliament, would best be achieved by establishing a network of existing distance education institutions (CEC, 1991b). However, in 1991 the UKOU, in particular, started to market its courses into Europe on the grounds that

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<sup>74</sup> Charters d'Azevedo, Ricardo 1993 Programme of the Commission of the European Communities for 1993-1994: open distance learning initiatives EADTU *News* 14 August 1993 p7.

‘waiting for the rest of Europe to form an open university network would mean being held back by the slowest’.<sup>75</sup>

The collapse of the communist governments in Central and Eastern Europe in 1989 was another focus of attention for European distance education in that the post-communist era presented a new market for western European distance education. A new network, the European Distance Education Network (EDEN) was established in Prague in May 1991 with the aim of fostering

developments in distance education through the provision of a platform for cooperation and collaboration between institutions, networks and other agencies in this field in Europe. Particularly it has an important challenge to assist in the development of collaboration between Western Europe and the new initiatives in Central and Eastern Europe.<sup>76</sup>

Indeed, EADTU and EDEN were contracted by the Commission to carry out the first phase of a project funded under the Phare programme designed to introduce distance education into eleven of the Central and Eastern European countries in June 1995.<sup>77</sup> The role of the networks in ODL policy development at EU level will be discussed in greater detail in Chapter 7.

The insertion of the commitment to ‘encouraging the development of distance teaching’ in the draft Treaty in 1991 was widely regarded as a coup for the distance teaching institutions. The impact of this commitment is difficult to quantify in terms of enrolments in Europe, as most of the standard transnational statistical indicators (e.g. OECD *Education At A Glance*) do not categorise according to mode of study. The US Government Department of Education has been monitoring enrolments in distance education courses at post-secondary level in the US since 1996. Distance education in the United States expanded rapidly in the 1990s, with the percentage of post-secondary institutions offering distance education courses rising from 33% in 1995, to 44% in 1997 and 56% in 2001.<sup>78</sup> Enrolments in distance education rose from 1,632,350<sup>79</sup> in 1997 to 3,077,000 in 2000-1 (NCES, et al., 2003). These figures indicate that 7.6% of undergraduates and 12.3% of post-graduates were taking distance education courses in 2000; however, just 29% of undergraduates and 38.1% of postgraduates who were taking distance education courses were actually taking the entire programme through distance education.<sup>80</sup> Internet technologies were by far the most common technology used by 90% of institutions; 51% used two-way video, 41% used one-way recorded video as the primary mode of instruction, while 29% used CD-ROM as the primary mode, and 19% used multi-mode packages (NCES, et al., 2003: v).

Enrolments in European distance education may be extrapolated from EADTU figures which show that enrolments in member institutions increased four-fold, from 275,691 in 1987 to 1,154,276 in 2003/4 (see Table 5.1 below). As providers of distance education outside of

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<sup>75</sup> Interview with UKOU Vice Chancellor John Daniel adapted from article in the *Herald Tribune* published in EADTU *News* 14 June 1991, p14.

<sup>76</sup> From press release from ICDE published in DEOSNEWS Vol 2 No 25 16 December 1992.

<sup>77</sup> Building the Network in Central and Eastern Europe EADTU *News* 20 November 1995 p5.

<sup>78</sup> U.S. Department of Education, National Center for Education Statistics, (NCES, 2002; NCES, et al., 2003) see website at <http://nces.ed.gov>.

<sup>79</sup> U.S Department of Education, National Center for Education Statistics (US Department of Education, 2001).

<sup>80</sup> U.S. Department of Education, National Center for Education Statistics (NCES, 2002) <http://nces.ed.gov/programs/coe/2002/section5/indicator38.asp>.

EADTU membership have increased substantially since 1987, it is likely that the 2004 enrolments are much higher than 1.1 million.

**Table 5.1: Enrolments In European Distance Teaching Universities 1987-2004**

Country	Organisation	1987(1)	1990 (2)	1994(3)	1997/98 (4)	2004 (5)
Austria	Zentrum fur Fernstudien Universitat Linz	NA	NA	2000	2000	5,000
Belgium	STOHO	816	4056	1606	1189	6,000
Denmark	JOU/DAO	750	700	850	8970	NA
Finland	FADE	NA	NA	9500	50,000	80,000
France	CNED	NA	NA	NA	360000	350,000
France	FIED	26,000	31,200	30,000	38000	20,000
Germany	DIFF	NA	NA	NA	NA	NA
Germany	FernU	41,000	45,000	53,000	55,450	55,000
Ireland	NDEC/Oscail	290	3,500	2911	3,651	3,000
Italy	Consortia per l'Universita a Distanza	1,200	2,300	2300	NA	NA
Italy	NETTUNO (Il Network per l'Universita Ovunque)	NA	NA	NA	NA	60,000
Netherlands	OUNL	33,542	53,500	60,000	25899	26,000
Norway	NADE	NA	NA	7000	10000	NA
Portugal	U Aberta	NA	4,500	4500	11137	15,000
Spain	UNED	83,121	109,041	127,000	136,444	200,000
Spain	Universidad Aberta Catalunya	NA	NA	NA	NA	25,000
Switzerland	FernStudienSchweiz	NA	NA	195	494	1,276
Sweden	SADE	NA	14,000	2000+	24000	80,000
UK	OUUK	88,972	96,931	115065	204000	188,000
UK	OLF	NA	NA	NA	8500	40,000
<b>Totals</b>		<b>275,691</b>	<b>364,728</b>	<b>417,927</b>	<b>939,734</b>	<b>1,154,276</b>

Sources: (1) EADTU 1988 Directory (2) EADTU 1991 Mini-Directory; (3) EADTU 1994 European Association of Distance Teaching Universities Membership 1994 EADTU: Heerlen; (4) EADTU 1998 Mini-Directory 1998 EADTU: Heerlen; (5) Data from individual websites accessed 22/04/04 and email communication EADTU 23/04/04

With regard to technology, despite the widespread awareness of the potential, and experimentation, the rate of adoption of the new technologies at the beginning of the 1990s was minimal, with printed texts and face to face tutorials predominating in the member institutions of EADTU (Bates, 1990b: 20). Indeed, according to Bates, the UKOU, which at that stage was one of the most technologically advanced distance teaching universities, had managed to achieve significant adoption of only one new technology in its courses in the previous twenty years, with the audio-cassette replacing radio; it was anticipated that video would shortly replace television broadcasts in the near future (Bates, 1990b: 21). However, this situation was to change rapidly with the development of the Internet and networked communications which allowed institutions to adopt computer conferencing and virtual learning environments from the mid-1990s onwards. In a snapshot of the use of media in operational distance education programmes (as opposed to pilot projects) in 1998, Curran and Fox (1999) reported on the rapid growth in the use of email and the Internet, as well as the attempts by the institutions studied to build complete web-based learning environments, to handle course registrations, delivery of course materials, tutorial support and assessment. Subsequently, commercially developed environments, such as Blackboard or WebCT became widely adopted as the standard environment for web-based or online teaching. While much research is currently taking place into the potential of 'resuable learning objects' (i.e. small self-contained units of courseware which can be combined in many ways to create an individualised course for students) and other more speculative technologies, the major focus of distance learning since 2000 has been in testing and experimenting with using the web to combine the delivery of course content with pedagogically-effective online interaction between students and tutors.

Following the Maastricht Treaty, the Commission embarked on a series of action programmes aimed at promoting and stimulating ODL developments. However, much of this activity

ended up supporting schools and universities as the Commission sought to stimulate the convergence between distance education and traditional forms of education. In the late 1990s, the term ODL began to disappear in official communications, to be replaced by elearning which came to signify the use of ICTs in teaching and learning. The increasing accessibility of web-based virtual learning environments has led to the adoption of elearning methodologies by conventional universities. While distance enrolments in Europe grew in the period, there are concerns that the traditional distance teaching universities are losing out to campus-based institutions. The elearning 'revolution' generated many expectations that universities and other institutions could make vast profits through selling courses online on a global basis. This concern is encapsulated in the CISAER study on distance learning in Europe which draws attention to:

the decline of the influence of distance learning in Europe because of its failure to harness the technologies of the Electronic Revolution of the 1980s to distance learning, just at a time when e-learning has become a major global business (CISAER, 2000).

Many of these expectations were dashed as a number of high profile institutions closed or withdrew from the elearning market when large numbers of students failed to materialise (MacLeod, 2004). Nevertheless, it is clear that distance teaching institutions in 2004 no longer have a monopoly over distance education. In parallel, as will be demonstrated below, the influence of distance teaching institutions and networks on the Commission appears to have diminished, or at least been diluted by the entry of other players into the distance education arena. This issue will be taken up in Chapter 6 which seeks to establish to what extent has the EU 'encouraged the development of distance education' in Europe. The next section will provide an overview of EU policy in 1987-2004.

## **5.4 EU POLICY 1987-2004**

### **5.4.1 OVERVIEW**

Between 1987 and 2004, the European Union went through significant change and development linked with the processes of integration and enlargement. The Single European Act came into force in July 1987 and ushered in a new era of educational policy-making linked with preparations for the completion of the internal market by 1992. The collapse of the communist economies in Eastern Europe in 1989 presented the possibility of expansion beyond the existing Member States, along with new markets they represented (Huber, 1993: 12). According to McDaniel (1991), the period 1987 to 1990 saw consolidation and expansion of the Commission programmes, closer contact with the ETA countries and Eastern Europe and a fundamental discussion on a possible extension of the legal framework for a European Community involvement in education. Nine education and training programmes were launched by the Commission between 1986 and 1991, with a combined budget of 1billion ECUs (Field, 1998) a development seen as a direct consequence of the Single European Act (Hake, 1999).

Between 1989 and 1991, five key documents were published: on open distance learning; higher education; vocational education; skills shortages; and proposals for university industry cooperation (Field, 1998: 49). These documents sparked considerable debate, not because the proposals were particularly radical, rather because in Field's terms the

rather modest proposals were set against an iconoclastic analytical backdrop in which the Commission freely passed judgement upon matters that belonged without question to the sovereignty of member states. Essentially, the Commission's approach was to create a discourse of crisis, which then made its own proposals sound eminently reasonable under the circumstances (Field, 1998: 50).

All five documents were the source of widespread discussion involving political, educational, employers, and other interest groups. This process presaged the procedure to be adopted by the Commission in its policy oriented communications in the 1990s; a 'discourse of crisis' preceded modest proposals for action couched in general terms (Field, 1998: 52). Both the Higher Education and ODL memoranda made extensive recommendations for Community action on ODL and a commitment to encouraging 'the development of distance education' in European education was written into the Treaty of Maastricht, signed in February 1992.

Field regards the Commission's actions in the 1990s as indicating that the Treaty of Maastricht represented, not a turning point, but rather a milestone on a 'rather lengthy pathway' (Field, 1998: 57). Indeed, the Treaty on European Union has been renegotiated three times since Maastricht: the Amsterdam Treaty was signed in 1997; the Treaty of Nice was signed in 2001; and another renegotiation was under way in 2004. According to Edwards and Boreham, the 1990s saw the EU policy stream turning into

a river of consultation papers, statements, green and white papers, directives, legislation and memoranda, all ostensibly seeking to promote a learning society through the development of a culture of lifelong learning [responding to the challenges] of globalisation, integration, enlargement, economic polarisation (Edwards and Boreham, 2003: 407).

The new Commission appointed in 1995 set out four objectives for its term of office: 1) to place emphasis on growth and employment; 2) the European model of society based on solidarity (including education and training); 3) the idea that Europe should make its presence felt more strongly on the international scene; and 4) preparation for a series of events including enlargement of the Community and economic and monetary union.<sup>81</sup> That the Commission was flexing its muscles can be seen in the statement

Subsidiarity and proportionality must not be used as pretexts to call into question all that the Community has already achieved or to return to the intergovernmental method which is neither efficient nor democratic.<sup>82</sup>

These sentiments were echoed by Commission President Jacques Santer

I will not allow subsidiarity to be used as a pretext for calling Community law and 40 years of shared effort back into question. Let us not take our achievements lightly. Let us not put them at risk.<sup>83</sup>

The late 1990s saw a move to mainstreaming education and training in all EU policies (Hingel, 2001). By 2000, the Lisbon Process had put education and training into the forefront of policies aimed at making Europe the most competitive economy in the world.<sup>84</sup> The following sections will examine these developments in some detail in the light of their impact on ODL policy-making. Section 5.4.2 will discuss events and developments during the open policy window period which lasted from 1987 to 1991. Section 5.4.3 will deal with the relatively short post-Maastricht period which saw some interesting reactions, as well as

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<sup>81</sup> CEC 1996 The Commission's programme for 1997 COM(96) 507 Final and SEC (96) 1819 Final *Bulletin of the European Union Supplement* 1/97 pp7-13.

<sup>82</sup> Ibid p7.

<sup>83</sup> CEC 1996 Presentation of the Commission's work programme for 1997 to the European Parliament by President Jacques Santer, Strasbourg 22 October 1996 in *Bulletin of the European Union Supplement* 1/97 p17.

<sup>84</sup> 2001 Council resolution No 2001/C 204/01 of 13 July 2001 on the role of education and training in employment related policies OJ C 204 20 July 2001 p1-2.



actions in ODL. Chapter 6 will take up the account in the years after the policy window closed.

## **5.4.2 THE POLICY WINDOW OPENS 1987-1991**

This section looks at the events and activities which took place during the five years in which the policy window for distance education remained effectively open. The first part of this section outlines the changes which occurred in the organisation and staffing of the Commission which allowed for a sustained and informed focus to be placed on developing a Community policy in ODL. This will be followed by an account of a series of activities supported by the Community and the ODL networks which helped to raise awareness of the issues and which also served to push the issue of ODL firmly on to the EU agenda. Finally, three key documents will be analysed: the memoranda on Open Distance Learning and Higher Education and the Maastricht Treaty.

### **5.4.2.1 Changes In The Commission**

When the European Parliament passed its resolution on open universities in 1987<sup>85</sup> DGV held responsibility for education policy. Little immediate overt action was taken to follow up the Parliamentary proposals. Events began to move when in March 1989, a separate Task Force: Human Resources, Education, Training and Youth was set up under the direction of Hywel Jones. The Task Force reported directly to the new Commissioner, Vasso Papandreou. The establishment of the Task Force was seen as a recognition that human resources had become a priority policy area in the Commission, designed according to Delors' statement in the European Parliament in January 1989 'to put some flesh on the Community bones and give it more soul and spirit' (quoted in CEC, 1989: 7). While the Task Force was small, its establishment represented a recognition that education and training policy should have a relatively independent status (Nihoul, 1999: 105). Nevertheless, others were concerned about the severity of the challenge facing the Task Force in tackling education, particularly higher education in the Community:

The establishment of a Task force combined with the budget increase for education expresses a growing involvement in higher education policy...a growing interest in the formulation of a European higher education policy is noticeable, but still overshadowed by national interests and the fear of undesired, cultural dominance if educational structures were indeed to be subject to supra national decisions (McDaniel, 1991: 42).

The Task force operated in five units based on the different programme areas. Unit 3 Education and Training for Technological Change, coordinated EUROTECNET and was responsible for distance education. Despite its small size, and the scale of the challenges facing it, the Task Force produced an impressive amount of work. Field comments that the two years before 1992 'witnessed a flurry of activity in DGV and the Task Force on Human Resources in an attempt to ensure that new policies were in place, or at least before the Member States' by the time a key series of decisions on new programmes were to be taken (Field, 1998: 49). The Task Force immediately set about meeting and consulting with networks and preparing proposals and position papers. For example, EADTU records show that Hywel Jones met with EADTU on several occasions between 1987 and 1992.<sup>86</sup> While other sections of the Commission were involved in policies and actions which affected ODL, it is clear that the establishment of the Task Force was an essential factor in stimulating, supporting and facilitating ODL policy development in this period.

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<sup>85</sup> European Parliament Resolution of 10 July 1987 on Open Universities in the European Community Session Doc A2-0069/87 OJ 0133.

<sup>86</sup> Various EADTU *News* and Executive Meeting Minutes.



The Commission announced that the Task Force was to prepare a report on ODL universities before the end of 1990 in its Guidelines on education and training published in June 1989.<sup>87</sup> Jones had requested Ricardo Charters D'Azevedo<sup>88</sup>, the Head of Division responsible for New Information Technologies for Education and Training, to prepare reflections on ODL before the summer of 1989.<sup>89</sup> According to D'Azevedo this document was designed to stop 'the move of our colleagues from DGXIII – Information technologies to move on the content'.<sup>90</sup> Clearly policy boundaries between the different areas of the Commission needed to be delineated from time to time. According to d'Azevedo, the Staff Working Paper, finalised on 7 March 1990<sup>91</sup> helped him to convince his 'hierarchy' to appoint an expert to draft the proposed memorandum on Open and Distance Learning. Both d'Azevedo and Jones had attended a conference organised by EADTU in Paris in February 1990, during which the possibility of seconding someone from EADTU to the Commission was discussed.<sup>92</sup> With perhaps surprising speed, on 15 March 1990, Coen de Vocht, then executive secretary of the EADTU was seconded from the Dutch Open University to work in the Commission for a period of two years to oversee the drafting of the Task Force's proposals on ODL.<sup>93</sup>

As the following sections will show, the combination of expertise within the Commission, and the efforts of an expanding number of ODL networks to persuade the Commission to adopt their proposals, was a crucial factor in the refinement of ODL policies during this period. The next sections will discuss the milestones on the way to the Maastricht Treaty, starting with a description of the activities and events which generated increasing awareness of the potential of ODL among a wide range of educationalists, policy makers and administrators.

#### **5.4.2.2 Consultation And Policy Coordination**

During the open policy window period, the Commission played an important role in preparing the ground for the incorporation of ODL in Community policy on education and training by adopting a policy coordination approach based on systematic consultation with a broad range of groups and the use of expertise (Wallace, 2000b: 32-33 ). The typical features of this approach included developing networks of experts or epistemic communities; involving 'independent' experts as promoters of ideas and techniques; convening high level groups in the Council, in brainstorming rather than negotiating mode; and dialogue with specialist committees in the European Parliament (Wallace, 2000b: 33). The Commission adopted three basic strategies in developing its ODL policy. Firstly, they supported and promoted the development of a range of distance education networks; secondly they set up a number of expert committees and groups to prepare reports and recommendations; thirdly they supported a series of key conferences and dissemination activities aimed at involving a wide range of academics and policy makers. The combined effect of these three strategies was to create a momentum in favour of the Community taking action at a political level to support distance education as will be discussed below.

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<sup>87</sup> Commission Communication 'Education and training in the European Community: Guidelines for the Medium Term 1989-92 (COM(89)236 Final).

<sup>88</sup> Ricardo Charters d'Azevedo had been Deputy Minister for Higher Education in Portugal prior to his appointment to the Commission. Interview Coen de Vocht 29 September 2003.

<sup>89</sup> D'Azevedo, Personal Communication via email to author 4 September 2003.

<sup>90</sup> Ibid.

<sup>91</sup> Commission Staff Working Paper. Distance Education and Training SEC(90)479 7 March 1990.

<sup>92</sup> Coen de Vocht. Interview with author 29 September 2003; personal communication email 7 may 2004.

<sup>93</sup> EADTU Executive Committee Minutes 7 December 1990 p5; personal communication C de Vocht.

#### 5.4.2.2.1 Networks

Between 1986 and 1990, five ODL networks were established with varying degrees of financial and moral support from the Commission. The first two networks emerged from the Open Universities in 1986 and overlapped in membership to a great extent. SATURN (Scientific and Technological Updating for Remote Networks), comprising a network of open and distance teaching universities and enterprises, was set up on 1 October 1986 (Martin, 1986). Then, following a preparatory meeting on 23 October 1986, the European Association of Distance Teaching Universities (EADTU) was established on 23 January 1987.<sup>94</sup> EUROPACE (European Programme for Advanced Continuing Education), comprising a group of universities and high technology companies developing satellite based training, was established after almost a year of preparation on 21-24 June 1987. In the following year, another satellite users' network, EUROSTEP (the European Association of Users of Satellites in Training and Education Programmes), was set up in April 1988 and its charter was formally agreed on 15 April 1989.<sup>95</sup> The 'Budapest Platform' was set up in May 1990 to support East-West cooperation with the aim of establishing a formal association of distance teaching institutions from Eastern and Western Europe (Sewart, 1990). EDEN (the European Distance Education Network) was established at a meeting in Prague in May 1991. As EDEN was formed relatively late in this period it was not in a position to play as significant a role as the other four networks. Chapter 7 will analyse the role of these networks in greater detail.

The Commission's role in the establishment and activities of these networks was fairly proactive and supportive. For example, Hywel Jones attended the founding meetings of SATURN, EADTU and EUROPACE.<sup>96</sup> The Commission attempted to encourage the networks to form links and work together, for example, there are records of joint meetings between Jones and EADTU, [EURO]PACE and SATURN in May 1987 at which financial issues and the potential contribution of distance education to the Commission's education policy were discussed.<sup>97</sup> The Commission also met the individual networks on a number of occasions to discuss funding under the ERASMUS and COMETT programmes.<sup>98</sup> By 1991, the EADTU was able to reflect on the strong links developing outside the Task Force especially through DELTA and EUROFORM as an indication of 'EADTU's spreading relationship within the EC'.<sup>99</sup>

The activities described above fit in with Richardson's description of the risk sharing behaviour of Commission Officials who build coalitions with various groups which tend to favour its own ideas for policy change (Richardson, 1996b: 15).

By assisting the formation of networks of 'relevant' state and non-state actors, or by 'massaging' the way that these networks operate, the Commission can maintain its position as an 'independent' policy-making institution and can increase its leverage with the Council of Ministers and the European Parliament (Richardson, 1996b: 15).

<sup>94</sup> Conference of Rectors of European Open Universities and Institutions of Higher Distance Education Heerlen 23 January 1987 U87/1726 HWG.

<sup>95</sup> EUROSTEP Foundation, EUROSTEP the Educational Channel for Europe: A summary of plans, achievements and opportunities for educators and sponsors.

<sup>96</sup> EADTU Annual Report 1987.

<sup>97</sup> EADTU Executive Meeting 8 May 1987 Minutes.

<sup>98</sup> e.g. 25 June 1987, 31 July 1987, 10 December 1987 EADTU Annual Report 1987; 4 May 1988 EADTU Report of Meeting of EADTU representatives with ERASMUS Bureau 4 May 1988; and others.

<sup>99</sup> EADTU Minutes of General Meeting 28 September 1991 Athens.

#### 5.4.2.2.2 Expert Committees

The two expert groups which contributed most to the development of ODL policy during this period were the Commission's Industrial Research and Development Advisory Committee (IRDAC) and a specially convened Expert Group on ODL which met on two occasions to discuss the ODL *Memorandum*.

In 1989, IRDAC set up a Working Party, chaired by Sir Robert Telford of The Marconi Company (UK), to consider education and training from the perspective of industry. IRDAC agreed its influential report on skills shortages in Europe in November 1990 (IRDAC, 1991). The report concluded

The relationship between education and training and industrial competitiveness is a vital one. It is changing in nature and in the face of the pace of technological change an associated global competition. IRDAC is convinced that the education and training issues related to industrial competence and competitiveness have an overriding importance in relation to the future of Europe and its citizens (IRDAC, 1991: v).

Citing decreasing numbers of young people joining the workforce, as well as the obsolescence of knowledge, IRDAC recommended that continuing education must become a mainstream activity of the higher education sector. While acknowledging that 'traditional face to face formats and lectures have a lot of intrinsic value' they are 'not the appropriate solution for the quantum leap which is needed in continuing training' (IRDAC, 1991: 44). IRDAC called for

a large structural effort in distance and flexible learning is required in Europe. Traditional distance learning systems (such as those of the open universities in Europe) should be assisted in redirecting their actions more towards industrial environments. In addition, new technology itself should be used in the production and delivery of training materials to allow for individualised learning and to increase the efficiency of the training process. IRDAC welcomes the actions under way in various European Programmes (in particular developments under COMETT and DELTA) and the emergence of organisations like EuroPACE, SATURN, EUROSTEP, EADTU), but observes that important obstacles still need to be removed, in particular the complete lack of standardization, the high unit cost of multimedia training products, the inadequate teaching and learning experience regarding their effective use and the insufficient user friendliness and attractiveness of such packages and systems (IRDAC, 1991: 44) [emphasis in the original].

The IRDAC Report was widely distributed by the Commission to policy makers and higher education institutions. Its delineation of the extent of the skills deficit in Europe gave rise to serious concerns among policy makers leading to increasing demands on the education and training system to solve the problem, while its support for distance education was warmly welcomed by the distance teaching universities.<sup>100</sup>

Following an initiative of the Irish Presidency of the Council in early 1990, a group of National Experts on Distance Education and Training was convened to assist the Task Force in drawing up a memorandum on distance education. The IRDAC report was used as one of the major arguments for action in distance education. The Expert Group comprised two representatives nominated by the Ministries from each of the Member States<sup>101</sup> and met on

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<sup>100</sup> EADTU *News* 6 February 1991.

<sup>101</sup> The author was substitute expert at the second meeting of the Expert Group on 30 May 1991 and participated in the review of the Commission's proposals. The other Irish representatives were Chris

two occasions, on 1-2 October 1990 and 30 May 1991. The process of preparing the *Memorandum on Open Distance Learning* will be discussed in greater detail below.

#### **5.4.2.2.3 Consultative Conferences And Dissemination Activities**

Distance education featured as a topic at a range of consultative and dissemination conferences between 1987 and 1991. Some of these were organised directly by the Commission, whereas others were organised by networks and institutions with financial support from the Commission. Commission officials also attended these conferences, either to give keynote speeches on the Commission's developing policies, or to listen to the current ideas and developments in academia and industry. Hywel Jones explicitly laid out the Commission's strategy for fostering dialogue on the future of education and training in general in his foreword to the proceedings of a workshop organised on behalf of the Task Force in Leuven on 21-23 June 1989:

Education and training will play a major role in meeting the objectives set out for the completion of the Internal Market in 1992, notably the achievement of economic and social cohesion at Community level. It is for this reason that the Commission has decided to give high priority in the years ahead to its education and training activities, while respecting the principles of diversity and subsidiarity...The Commission considers that it would be valuable for Member States to exchange experiences on these [common problems] and other issues of common concern in the run-up to 1992. (Jones, 1989: 320).

Jones went on to describe the Workshop as the 'first of a series of activities that the Commission intends to sponsor in order to facilitate dialogue amongst the various actors concerned with the changing role of education and training in Europe in the higher education sector' (Jones, 1989: 320). A paper by Cerych and Neave (Cerych, 1989) which was one of the background papers for the Workshop makes explicit mention of distance education and the need for traditional universities to adopt distance education methods in order to meet their responsibilities for continuing education.

The Task Force organised a conference in Siena on 5-7 November 1990 to discuss higher education and 1992, as well as planning for the year 2000. The conference was attended by high level representatives of the Ministries, regional authorities and institutions of higher education; and its conclusions and recommendations were widely distributed within the Member States (CEC, 1990a). The Conference strongly encouraged the Commission, the Member States and higher education institutions to recognise the value of distance education which it regarded as

essential to the proper provision of continuing education and training in view of the freedom distance education offers from time and space constraints. It recognised, too, the role that distance education can play in initial training and in reaching many people in remote and peripheral areas to whom institutional systems are inaccessible (CEC, 1990a: 7).

The Conference recommended that the Commission should launch an initiative in distance education aimed at 'higher education needs in continuing education' including languages, the European dimension and joint teaching programmes' (CEC, 1990a: 9). Member States were requested to encourage distance education structures at national level and to support the development of a significant European initiative in this field, while institutions were requested to adopt flexible structures which would facilitate distance learners (CEC, 1990a:

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Curran, Director of Oscail - the National Distance Education Centre and Chair of the Media Methods and Technology Group of EADTU, and Michael Foley, Director of the Audio Visual Centre, UCD and President of EuroSTEP.

12). The *Memorandum on Higher Education* (to be discussed below) acknowledged the influence of the discussions which took place at the Leuven and Siena meetings (CEC, 1991a: 1).

Other influential conferences which took place during this period and which contributed to the growing awareness of the role of distance education and educational technology in Europe were the 'DELTA and Beyond' Conference in the Hague 18-19 October 1990 at which two commission officials, Luis Rosello, Director of DGXIII/F and Dr Roland Huber, Head of the DELTA unit gave keynote speeches (Cerri and Whiting, 1993). Two conferences produced influential books on methods and technology in distance education: the Najaden Research workshop, sponsored by NATO took place on board a three mast schooner 'Najaden' which sailed between Copenhagen and Stockholm while the eighteen distance education specialists on board discussed collaborative and computer conferencing (Kaye, 1991)<sup>102</sup>; and the EADTU conference on Media and Technology which took place in Milton Keynes in 1989 (Bates, 1990a). Two other conferences organised by EADTU with Commission support helped to generate substantial interest in distance education; the first on 'Long Term Developments of Distance Education' in Lisbon on 1 July 1988 and the second on languages and distance education in Paris in February 1990 were attended by Hywel Jones and other Commission officials. A major European Multimedia conference took place in Athens on 26-27 September 1991 at the initiative of the European Commission and organised by Saturn, Intercal Multimedia Skills and ERT (Greek Radio and Television) (CNED, 1993).

#### 5.4.2.2.4 Political Initiatives

While the Task Force was gathering and disseminating ideas on an ODL policy during this period it was also required to gain political support for these ideas if any effective action was to take place. The Commission had issued a series of communications containing wide ranging proposals on actions in education and training<sup>103</sup> which were discussed at a number of meetings of the Council of Ministers of Education between 1988 and 1989 (CEC, 1989). These Communications proposed three broad objectives to which education and training could contribute: 1) the completion of the internal market; 2) closer integration of the educational and economic systems; and 3) reduction of regional disparities (Fox, 1989). In its Communication issued in June 1989 the Commission announced its intention to present a report on Open and Distance Learning Universities as well as a special memorandum on education before the end of 1990.<sup>104</sup> The Council and Ministers for Education meeting on 6 October 1989 took account of these guidelines in setting the principal objectives of intensified cooperation in education and training, thus marking a new stage in Community cooperation in this field, although they made no specific commitment to ODL (CEC, 1991a: 1).

ODL emerged into the political stream when Ireland held the Presidency of the European Union in the first half of 1990. The Presidency prepared a discussion paper<sup>105</sup> for the Council and Ministers of Education meeting within the Council of 31 May 1990 in Brussels, which requested Ministers to consider three questions:

<sup>102</sup> Ambrosius, Jens 1991 NATO Advanced Research Workshop *COSTEL News* Vol 1 August Page 1.

<sup>103</sup> Commission Communication on Medium-term perspectives in education and training 1989-1992 COM(88)280 Final; Commission Communication 'Education and Training in the European Community - Guidelines for the Medium Term: 1989-1992 COM(89)236 Final June 1989.

<sup>104</sup> Ibid.

<sup>105</sup> Note of the Presidency to the Council and the Ministers of Education meeting within the Council on 31 May 1990. Doc 6125/90 EDUC 65 SOC 88 Dated 2 May 1990.



- On the eve of the completion of the internal market and in the context of respective national educational and training policies, what should be the main objectives of the Member States in distance education and training?
- In what priority areas of distance education and training would intensified Community cooperation have real added value?
- What practical measures of European Cooperation should be promoted?

The Irish Presidency's initiative on ODL is cited as a rare example of a Presidency setting the agenda, rather than just shaping or structuring it (Tallberg, 2003); however, as will be seen below, the Commission was at least as powerful in setting the scene for the Presidency to take this initiative. The explanation for the Irish Presidency's initiative lies in the confluence of a number of interests. Towards the end of 1989, the Irish Department of Education had invited Oscail, the National Distance Education Centre to draw up a series of suggestions for 'potential cooperative initiatives in distance education'.<sup>106</sup> The likely impetus for this request is a meeting with the then Minister for Education, Mrs Mary O'Rourke, Drs Chris van Severter, Secretary General of EADTU and Mr Chris Curran, Director of Oscail.<sup>107</sup> The Oscail note suggested joint course development initiatives and formed the basis of the first draft of the Presidency note considered by the Education Committee on 18-19 January 1990.<sup>108</sup> That EADTU was aware of the proposed new political developments, is clear, as the Executive Secretary, Chris van Severter reported to the Annual General Meeting of 16 February 1990 on 'a possible breakthrough', to be discussed by the Council of Ministers at its forthcoming meeting on 31<sup>st</sup> May. The Director of Oscail informed the meeting that the Irish proposals were quite 'modest, based on the EADTU memorandum'<sup>109</sup> and building on existing networks'.<sup>110</sup>

Analysis of the final version of the Irish Presidency note discussed in May 1990 reveals major differences from the original proposal. Only a small portion of the original note remained, with some paragraphs incorporated verbatim. It is clear that the greatest influence in preparing the Note was the Task Force Staff Working paper prepared by Charters d'Azevedo, referred to above (CEC, 1990b). This was a key document setting out the Commission's thinking on ODL, and reflected the period of intense consultations with ODL networks which had preceded it. The Staff Working Paper had been prepared for the Education Committee 'to contribute to an exchange of views relating to developments in distance education and training all over Europe' (p1). It summarised the main developments in distance learning, including an interesting description of the role and background of the four main ODL networks. It stated that distance education was of particular interest to the community because of its cost-effectiveness; its ability to enhance access to and participation in education and training for individuals and organisations, in particular SMEs; and its ability for rapid transfer of training expertise and materials between regions (para 2).

The paper summarised the objectives of the Commission's support for cooperation in distance education as:

- To stimulate greater awareness of the potential of open learning itself as a contribution to effective and efficient training systems

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<sup>106</sup> Draft document 'Potential for Cooperative Initiatives in Distance Education (Oscail Archives).

<sup>107</sup> Chris Curran, Interview 30<sup>th</sup> March 2004; Chris van Severter, Interview 1 April 2004.

<sup>108</sup> Presidency Note to Education Committee Meeting of 18-19 January 1991: Potential for cooperative initiatives in distance education. 11006/89 EDUC 121 dated Brussels 20 December 1989.

<sup>109</sup> viz EADTU 1989 *Towards a European Open University* Heerlen: EADTU.

<sup>110</sup> EADTU Annual General Meeting 16 February 1990 Paris Minutes EA 20-3.



- To promote cooperation between specialist institutions of open learning within the Community in order to spread experience, leading to the development of a network of such institutions throughout the Community
- To promote good distance learning practice more widely within education institutions at large and within enterprises (particularly in relation to continuing education)
- To foster specific joint cooperation in fields where a European Community approach will have clear Community value
- To involve the development and application of information and communication technologies for flexible and distance learning at European level, in relationship with Community R&D programmes. (para 8).

It is interesting to compare the degree of concordance between the Commission's Working Paper and the Irish Presidency Note. Distance education in both papers is defined as follows:

distance education covers various forms of study at all levels which are not under the continuous and immediate supervision of tutors present with their students in class on the same premises, but which nevertheless benefit from the planning, guidance and tuition of a tutorial organisation. (para 3 Working Paper; para 1 Presidency Note).

The main intent of Paragraphs 12 to 14 of the Staff Working Paper is incorporated into Paragraphs 5 to 7 in the Presidency Note. The potential of setting up a European Open University as proposed by the European Parliamentary resolution of 1987 was dismissed on the grounds that:

Given the substantial investment already made in existing and open and distance teaching institutions and also the motivation which they have shown to cooperate amongst each other, the Commission have supported the idea that the aims and objectives of a European Open University would be best achieved through networking amongst the existing institutions (Para 12 of the Working Paper; para 5 of the Presidency Note).

Paragraph 13 of the Working Paper refers to the growing use of distance learning methods by other higher education and training institutions leading to an increase in the market for distance education and training. The paragraph, in a slightly edited form, is repeated as Paragraph 6 of the Presidency Note. Finally, the Working Paper lists seven possible areas in European Community cooperation which are again repeated in the Presidency Note, in particular

the consolidation and possible future extension of the 'European Open University Network', drawing on the experience of the EADTU, as a network of existing universities, not only in the field of higher education, achieved through a planned programme of course and credit transfer, linked to the joint development of new European level courses (para 14 Working Paper; para 7 Presidency Note).

The Presidency Note was discussed by the Council of Ministers of Education on 31 May 1990. According to the minutes of the meeting (which was chaired by the Irish Minister for Education, Mrs Mary O'Rourke)

At the end of their exchange of views the Council and the Ministers expressed the wish that the Commission should take their remarks and comments into consideration when drawing up the communication which it intended to submit to the Council shortly.<sup>111</sup>

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<sup>111</sup> Minutes of the 1409<sup>th</sup> meeting of the Council and the Ministers for Education meeting within the Council held in Brussels on Thursday 31 May 1990 6849/90 Restreint PV/CONS 27 EDUC 77; the Press Release issued following the Meeting referred to the Commission's intention to submit the communication by the 'end of the year' Council of the European Communities General Secretariat Press Release 6712/90 (Presse 78)

The Task Force was commended for its speed in following up this initiative, when it invited Member States to nominate national representatives to attend a meeting of experts in distance education and training in Brussels (initially proposed for 20-21 September 1990, and rescheduled for 1-2 October) to discuss its communication on distance education.<sup>112</sup> This speed of action was perhaps not surprising in view of the fact that it had taken the Commission over three years from the European Parliament's resolution to achieve endorsement at political level for its proposals on distance education. The next section will discuss in some detail the *Memorandum on Open Distance Learning* which emerged from the Commission's policy coordination activities during this period.

#### **5.4.2.3      *The Memorandum On Open Distance Learning***

The Task Force published the *Memorandum on Open Distance Learning* on 12 November 1991 (CEC, 1991b). In drawing up the *Memorandum* the Commission states that it has

taken note of the views of the Education Ministers as expressed at the Council meetings on May 31, 1990 in Brussels and on November 8 1990 on Siena. It has closely considered the opinion and advice of the National Experts Group on Open and Distance Learning that has been established on request of the Council. It has also benefited from the studies made by experts on behalf of the Commission and from the studies and reports from the Council of Europe and of the OECD (CEC, 1991b: 14).

One former Task Force official points out that other parts of the Commission, such as DGXIII which was responsible for media and technology and which had funded other technology driven ODL initiatives such as DELTA, were not involved with the preparation of the *Memorandum*; thus the *Memorandum* is a testimony to the Task Force's vision of what constituted distance learning at that time, and what actions, if any, Europe should take in this arena.<sup>113</sup>

The first formal stage in preparing the *Memorandum* took place at the meeting of National Experts in Brussels which was held on 1-2 October 1990. This meeting and the subsequent meeting on 30 May 1991 were attended by two experts from each of the then twelve Member States, as well as representatives from the Commission, and invited experts in addition to the national representatives. The first meeting laid the ground work through reviewing the current situation with regard to distance education and national priorities in the Member States. Four invited experts made presentations: Professor Ulrich Battis (Rector of the German FernUniversitat and President of EADTU) on the open universities; Dr Peter Wright (UK Training Agency) on training and SMES; Dr A Graziani (Director General of the Italian Post Office, and President of Consorzio Universita a Distanza – CUD) on media and telecommunications; and Professor Armando Rocha Trindade (Principal of Universidad Aberta, Portugal and Deputy Secretary General of EADTU) on national and European experiences of collaboration in distance learning. The meeting concluded that there was great diversity in distance learning in the Member States; cooperation was the best course to take; distance education was not a university monopoly, although higher education, rather than SMEs, was proving more flexible with regard to utilising ODL; needs analyses were required with an awareness of the potential demand in Central and Eastern Europe; and finally, there were many obstacles to be overcome.<sup>114</sup>

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<sup>112</sup> Sean Harkin, Department of Education, Letter to H Jones 15 August 1990, Oscail Archive.

<sup>113</sup> Coen de Vocht, Interview 29 September 2003.

<sup>114</sup> Task Force Summary record of the meeting of national experts on distance training and education held on 1-2 October 1990.

The second meeting was arranged for 27 February 1991 in Athens: however, due to ‘the current unstable international situation’<sup>115</sup> (i.e. the Gulf War), this meeting was postponed to 30 May 1991. At this meeting, the Experts were presented with a report on ‘Open and Distance Higher Education in the European Community’.<sup>116</sup> This report comprised a comprehensive overview of distance education in Europe, based on information provided by the national experts as well as substantial contributions from EADTU in the form of an annex comprising a directory of EADTU members and their details.

The Report stressed the role of distance education in meeting the need for continuing education and training, pointing out that knowledge had a built-in obsolescence and that new technology was contributing to the need for new skills and knowledge (p2); the IRDAC report was cited several times in this regard (CEC, 1991c: e.g. 9, 24). Distance education had the flexibility in time, pace and place, lacking in traditional higher education; the integrated market of 340 million Europeans would increase the demand for higher education. The Report pointed out that Europe was lagging behind the rest of the world in terms of investment in distance education (p10). The focus should be on adult students who would have sufficient motivation and for whom social interaction would be less essential than for younger students (p11). The Report suggested that distance education was poised to enter the third phase of technology, with greater use of computer-based materials, which it was argued would make distance education ‘truly synonymous with open learning’ (p13). However, the Report was realistic in its forecast that change would be gradual and commended the distance teaching institutions for basing their policies on ‘educational pull factors rather than on technological pull ones’ (p14). The Report was aware of the dangers of a digital divide ‘technology-based media can bias participation in favour of economically advantaged consumers’ (p15). Nevertheless, it recommended experimentation with ‘virtual classroom’ technologies as a means of bridging communication gaps between student and tutor (p14). Among the possible areas of experimentation cited were developments in ISDN; artificial intelligence and intelligent tutoring systems (p18). Five paragraphs were given to language teaching, acknowledging the difficulties of teaching language at a distance, but suggesting that new technologies might assist (p20).

It is interesting to note that while the report was presented as a draft to the Meeting of Experts on 30 May 1990, the final version had in fact been issued on 24 May 1991 for consideration by the Meeting of Ministers of Education on 31 May 1991; thus, the experts were not in a position to make any changes to the document if they had wished to do so.<sup>117</sup> However, the Report was accepted by the Experts as a fair representation of the current status of ODL at that time, especially as it had been written by a member of staff of the Dutch Open University on secondment to the Commission, who was also the former Executive Secretary of EADTU.<sup>118</sup>

The main business of the Experts’ meeting was to discuss national responses to a series of questions posed by the Task Force; it was intended that the responses would feed into the *Memorandum*. These questions were: in which education and training sector could distance education and training have an added value? which fields of action are of special interest for your country? which actions should be undertaken at Community level? which actors and

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<sup>115</sup> R. Charters d’Azevedo. Letter to Chris Curran 2 February 1991 Oscanil Archive.

<sup>116</sup> Commission Report on Open and Distance Higher Education in the European Community (Draft Communication) Brussels 12 February 1991; the final version was SEC(91)897 Final Brussels 24 May 1991.

<sup>117</sup> From author’s notes of the meeting of 30 May 1991.

<sup>118</sup> Coen de Vocht was the main author of this report. Interview 29 May 1991.

partnerships in your country would be responsible for implementation of these actions? which models for European collaboration could be effective for these actions?<sup>119</sup> At the same meeting, three<sup>120</sup> separate presentations were made on the role of ODL and SMEs, while Luis Rodriques Rosello from DGXIII made a presentation on the forthcoming call for proposals on the DELTA programme.

A draft of the *Memorandum* 'Main Elements for Community Actions in Distance Education and Training' (Document 7) was discussed at the meeting, however, participants were informed that this version was to be substantially redrafted and that any formal responses to the draft should be submitted within two weeks. From the author's notes of the meeting, the Task Force officials were particularly keen to ensure that the Expert Group endorsed the potential of distance education for SMEs as well as the contribution which new technologies would make to ODL. The Irish Experts submitted a response which queried the emphasis on the training needs of SMEs pointing out that not all of these needs could be met through distance education since 'SMEs form a heterogeneous group, engaged in a range of manufacturing and services from clothing, hotel work, stone cutting, to high technology software development, leading to a diversity in specific education and training needs' which would minimise the cost-effectiveness of providing courses for low demand areas.<sup>121</sup>

The final version of the *Memorandum* published on 12 November 1991 was substantially different to the draft although the focus on using ODL to meet the needs of SMEs and industry remained. Interestingly, the *Memorandum* used the term 'Open Distance Learning' but provided a bipartite, and not very succinct, definition as set out in Table 5.2 below:

**Table 5.2: ODL Memorandum Definition Of Open Learning And Distance Learning**

By ' <b>Open Learning</b> ' is meant any form of learning which includes elements of flexibility which make it more accessible to students than courses traditionally provided in centres of education and training. This flexibility arises variously from the content of the course and the way it is structured, the place of provision, the mode, medium or timing of its delivery, the pace at which the student proceeds, the forms of special support available and the types of assessment offered (including credit for experiential learning). Very often the 'openness' is achieved, in part at least, by the use of new information and communications media.	' <b>Distance learning</b> ' is defined as any form of study not under the continuous or immediate supervision of tutors, but which nevertheless benefits from the planning, guidance and tuition of a tutorial organisation. Distance learning has a large component of independent or autonomous learning and is therefore heavily dependent on the didactic design of materials which must substitute for the interactivity available between student and teacher in ordinary face to face instruction. The autonomous component is invariably supported by tutoring and counselling systems which ideally are provided at regional/local study centers and to an increasing extent by modern communications media.
Because <i>Open Distance Learning</i> is meant to be adaptable to the pace of the student the material is generally structured in units or modules geared to specific learning outcomes. The presence of a strong autonomous component in Open Distance Learning is very much in keeping with the ideas current in higher education of making students more responsible for attaining their own learning objectives. (CEC, 1991b: 6)	

<sup>119</sup> From author's notes of the Experts Meeting 30 May 1991

<sup>120</sup> Dr Peter Wright, HE Advisor Department of Employment, UK; Dr L Quintino; and Dr M J Boon, OuNL

<sup>121</sup> NDEC Response to the Report 11 June 1991 (Oscail Archives)

By electing to use the term ‘open distance learning’ the *Memorandum* helped popularise ODL as a standard acronym to encompass a wide range of approaches to providing education at a distance; according to one Commission official the term ‘learning’ was deliberately chosen to avoid any debates about whether actions should be confined to education or training.<sup>122</sup> According to the *Memorandum* ODL has the potential to: increase the level of entry qualifications into the workforce; update and upgrade the entry qualifications into the workforce; provide advanced training and dissemination of research results; strengthen education/training infrastructures in less developed regions; create transeuropean networks; consolidate partnerships among states, institutions, and industry; support education and training in emerging countries in central and eastern Europe; include the European dimension in existing courses; teach about the European Community (law, institutions, policies); and improve the quality of education.

The *Memorandum* emphasised the need for coordination and cooperation in ODL: to give ODL standing and structure; to maintain standards and quality; provide counselling, tutorial and interactive support; and to recognise credits and qualifications. Among the strategies it recommended were the formation of institution/enterprise partnerships; formation of consortia to deliver ODL courses; and clarification of financing policies in Member States so that the disadvantaged would be able to participate in ODL courses. However, despite the emphasis on cooperation, the *Memorandum* supported the concept of an open market in ODL ‘products’ stating ‘it is important that local structures and support facilities for students should not be tied to local or national producers in such a way as to inhibit the operation of such a market’(CEC, 1991b: 11).

The *Memorandum* ends with a list of ‘specific fields for actions’ (CEC, 1991b: 13-14) which differ in many respects to the fields for action specified in the Staff Working Paper a year earlier which had been incorporated almost entirely into the Irish Presidency Note of May 31 1990. In order to track the persistence, emergence or disappearance of various action fields over time, the author analysed the fields of actions suggested in the four documents: the Staff Working Paper (WP), March 1990; the Presidency Note (PN) May 1990; the draft Memorandum, Document 7 (Doc7) considered at the Experts meeting in May 1990 and the final version published in November 1991 (Memo). These are summarised in Table 5.3 which categorises the areas for action identified in the documents into nine key areas: target groups; organisational models; academic structures; methods; courses; quality; cost; European cooperation; and the market for ODL.

The emphasis on the target groups for distance education varied somewhat, although all four documents recommended actions aimed at the SME sector, an area which was considered to have been neglected hitherto by distance education. Extending ODL to initial education (young students in post-secondary higher education) and continuing education students was recommended in the first three documents, but not in the *Memorandum*. Surprisingly, actions aimed at those in remote or rural areas only emerged in Document 7 and the *Memorandum*, while references to disabled students in Document 7 were dropped in the *Memorandum*.

With regard to the organisation of distance education at European level, support for specific action on the European Open University Network approach, evident in the Working Paper and Presidency Note were dropped in favour of a more generic ‘trans European delivery’ model in the later documents. The body of the *Memorandum* reiterated earlier statements of the Commission’s view that the ‘aims and objectives of a European Open University would

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<sup>122</sup> Coen de Vocht Interview 29 October 2003.

best be achieved through networking among existing institutions' (CEC, 1991b: 12). The *Memorandum* suggested actions on a broader front, citing expansion beyond traditional distance teaching institutions, the use of networks of local study centres, to provide local services to students, and joint ventures between industry, distance teaching institutions, and conventional institutions.

The Staff Working Paper had recommended action on academic structures designed to facilitate transnational mobility, including credit transfer, and mutual recognition of qualifications. However, these detailed proposals had disappeared by the time of the *Memorandum*, which merely suggested an action on mobility of students under the ERASMUS programme.

The emphasis on the use of new technologies in ODL remained constant through the documents, with all recommending actions on training trainers/teachers in the new methodologies; the use of educational technology in ODL; and developing links with the Community programmes (DELTA, COMETT, EUROTECNET) which were carrying out innovative research and development of potential relevance to ODL. While the first two documents recommended actions on 'innovative approaches', Document 7 and the *Memorandum* spelt out the type of technologies: multimedia, computer based-training, satellite transmission, and telematics.

Surprisingly, the documents had few specific proposals with regard to course content. The Working Paper made no reference to any specific course areas. The Presidency Note and the *Memorandum* mentioned European studies type courses; Document 7 referred to the need to adapt and localise courses coming from other countries, and also suggested courses in management, science and technology. The *Memorandum* settled for actions encompassing 'pilot projects' without specifying the area.

While the Presidency Note did not refer to actions on quality, the other documents recommended actions on quality assurance, promotion, or improvement of standards. The only reference to action on cost issues was in the Working Paper. With regard to actions on European cooperation, joint course production was mentioned in all four documents. The *Memorandum* settled for a general reference to 'actions to encourage and to support transnational cooperation between current and potential providers of Open and Distance Learning in order to promote wider exploitation of training products' (CEC, 1991b: 13).



**Table 5.3: Comparison of proposals for Community Actions**

Actions identified in Documents	WP Mar 90	PN May 90	Doc7 May 91	Memo Nov 91
<b>Target Groups</b>				
• SMEs	x	x	x	x
• Initial and continuing education students	x	x	x	
• Employed adults/updating/part-time students	x		x	x
• Remote/rural dwellers			x	x
• Disabled			x	
• Private organisations; publishing & open learning			x	
<b>Organisational Model</b>				
• European Open University Network	x	x		
• TransEuropean delivery			x	x
• Expand beyond distance teaching institutions	x		x	x
• Demonstration and local study centres			x	x
• Joint ventures, DTIs, Conventional Institutions and Companies				x
<b>Academic Structures</b>				
• Credit transfer; ECTS	x			
• Flexibility (time, place, pace)	x			
• Mutual recognition of qualifications	x	x		
• Transnational qualification and certification systems			x	
• Mobility	x			x
• Modular courses			x	
<b>Methods</b>				
• Training the trainers/teachers	x	x	x	x
• Educational technology	x	x	x	x
• Links with R&D programmes on technology	x	x	x	x
• Innovative approaches	x	x		
• Multimedia; CBT; satellites; telematics			x	x
<b>Courses</b>				
• European culture/dimension		x		x
• Adapt courses localisations, translation etc			x	
• Management, science, technology			x	
• Pilot courses				x
<b>Quality assurance, standards, promotion, improvement</b>	x		x	x
<b>Cost benefit</b>	x			
<b>European Cooperation</b>				
• Joint development of courses	x	x	x	x
• Course exchange/transfer	x	x	x	
• TransEuropean expertise/teacher exchange			x	
• TransEuropean networks			x	
• Support transnational cooperation				x
<b>The Market for ODL</b>				
• Remove obstacles to exchange of materials	x	x		
• Intellectual property rights	x	x		x
• Clearing house; information; directories etc			x	x
• Consumer protection				x
• Commercial exploitation	x	x		x

Finally the issue of the market for ODL was of concern in all documents. The Working Paper and the Presidency Note referred to actions to remove obstacles to the exchange of ODL materials, including tackling the issue of copyright and intellectual property rights as well as the commercial exploitation of ODL materials. Document 7 referred to the possibility of setting up transnational clearing houses, which would disseminate information through information activities, directories, databases etc. The *Memorandum* recommended that actions to stimulate the ODL market would include consumer protection as well as intellectual property rights, clearing house activities, and general actions to facilitate commercial exploitation of ODL 'products'.

The *Memorandum* 'was received with great interest by the Ministers for Education' at their meeting of 25 November 1991 (de Vocht, 1992: 15). In the next section the proposals on ODL contained in the *Memorandum on Higher Education* will be discussed. ODL was just one of a number of areas considered during the lengthy consultations between the Commission and higher education representatives and policy makers which took place in parallel with preparations for the ODL *Memorandum*. Yet, as will be seen, the Higher Education *Memorandum* received much wider attention than the ODL *Memorandum* and its strong endorsement for ODL was instrumental in bringing attention to the potential of ODL.

#### 5.4.2.4 *The Memorandum On Higher Education*

The Commission published its *Memorandum on Higher Education* on 5 November 1991 (CEC, 1991a).<sup>123</sup> Field comments that there were high expectations for this *Memorandum*, especially among adult educators, and it attracted more debate than the ODL and Vocational Education memoranda (Field, 1996b: 20). As with the ODL *Memorandum*, the Commission had consulted widely in its preparation of the HE *Memorandum*. It drew on the discussions and conclusions of experts in higher education at a Commission supported Workshop in the Catholic University of Leuven in June 1989 as well as a conference in Siena held in cooperation with the Italian Presidency in November 1990, and which was attended by experts in higher education as well as representatives of the ministries and regional authorities concerned with higher education, industry and economic life (CEC, 1991a: 1). The HE *Memorandum* also cited a number of documents which had influenced the deliberations including the report on distance education (CEC, 1991c) and the ODL *Memorandum* (CEC, 1991b) discussed in the previous section.

The HE *Memorandum* was presented as a discussion document, not a blueprint (CEC, 1993b: 7). It sought to underline the role of the universities in implementing the knowledge economy, through widening access to higher education qualifications, offering opportunities for updating knowledge, and contributing to economic progress through research in science and technology. From the outset, the HE *Memorandum* located EU interest in higher education in its potential to contribute to the completion of the Internal market and economic growth:

The growth of this European context in higher education and advanced training is assuming a strategic importance to the European Community in the light of the completion of the Internal Market, the movements towards political union and the global challenges that must be met by the European economy. These developments depend, on the one hand, on the skills and knowledge which underpin economic competence and, on

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<sup>123</sup> A resolution on the *Memorandum on Higher Education* was debated in the European parliament on 12 and 15 July 1993. The speakers at the debate were Elliott, Coimbra Martins, Hermans, Larive, Fremion, Barrer I Costa, Maibaum, Oostlander, Mendes Bota, Moretti, Flynn, Ephremedis, Galle and Llorca Vilaplana. OJ 0161.

the other, on the understanding and commitment which support significant political transformations (CEC, 1991a: Foreword).

In line with other EU documents, the HE *Memorandum* cites the competition posed by USA, Japan and the Pacific rim economies as an incentive to developing high level skills, and that by working in partnership with industry, higher education can contribute to the formation of the learning society (CEC, 1991a: 20).

The HE *Memorandum* identifies open and distance education<sup>124</sup> as one of the five critical areas for development in higher education of which the other four were: participation in and access to higher education; partnership with economic life; continuing education<sup>125</sup>; and the European dimension in higher education. Distance education was seen as a vehicle to cope with the expected expansion in participation in higher education required to meet the demand for workplace based education. According to the HE *Memorandum*,

'distance education should cover a wide range of levels and studies and should be capable of being integrated with institutional modes of study. There are particular advantages in European cooperation in the area of open and distance education' (CEC, 1991a: III).

The HE *Memorandum* devoted ten paragraphs to outlining the specific benefits and applications of distance education (CEC, 1991a: 26-28). These are summarised below.

*Para 89* describes distance education as having an extraordinary potential to contribute to education and training deriving from the freedom which it enjoys from constraints of time and place, giving it an extensive flexibility of application for use on its own or in conjunction with other learning systems:

There are, theoretically, no limits to its application...it can reach across the boundaries of regions, countries and continents. It is a service which can be virtually called up on demand, making minimum intrusion into the demands of the workplace, capable of being fitted into slack time or leisure time (CEC, 1991a: 26).

*Para 90* acknowledges the potential of the new technologies based on informatics and telecommunications. However, a note of realism is introduced with references to the high cost of multimedia and the rapid obsolescence of new technologies (CEC, 1991a: 27).

*Para 91* argues that distance education is suited to cooperative action on a transnational scale but that the Community programmes would need to provide a positive stimulus to such partnerships and networks.

Specifically, *Para 93* lists ten roles for open distance education in higher education:

- extending opportunities for participation in HE and helping to equalise educational opportunity;

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<sup>124</sup> Interestingly, the Memorandum uses the term 'open and distance education' and 'distance education' and not the term 'open and distance learning' which became the standard term in use in the Commission following the publication of the ODL memorandum.

<sup>125</sup> The term 'lifelong learning' is not used in the Memorandum, however, there is considerable emphasis on continuing education which must be 'mainstreamed' in higher education institutions, based on the argument that initial education must incorporate 'the idea of continuous learning and adaptation through future learning and training possibilities' (CEC, 1991a: 23).

- reinforcing educational infrastructure of regions;
- improving quality by incorporating high level teaching expertise into programmes and developing multimedia competence;
- strengthening transnational partnerships;
- supplying continuing education to SMEs;
- delivering advanced training and disseminating research results on a transnational basis;
- providing in-service training to teachers;
- providing technical assistance to third countries;
- contributing to the European dimension in education;
- teaching about European Community, laws, institutions, policies (CEC, 1991a: 26-28).

*Para 94*, while acknowledging the diversity of distance education systems with regard to maturity, structures, and size, proposes that ‘closer integration and relationship between distance education and the total structure of post-compulsory education and training would appear essential to future developments’.

*Para 95* proposes a role for distance education in all types of courses and qualifications from technician to graduate level, both vocational and general education, maintaining a modular structure throughout.

Interestingly, *Para 96* sees distance learning as complementing and supplementing the traditional system and recommends that students should be allowed to move between both modes stating that ‘closer integration and relationship between distance education and the total structure of post-compulsory education and training would appear essential to future developments’ (CEC, 1991a: 27). It acknowledges that for distance education to succeed in this role would require institutional and policy changes in the Member States in order to create the openness and structures to support distance education initiatives.

*Para 97* lists obstacles to be overcome before the benefits of European cooperation can be fully realised in the area of distance education. These include lack of standardisation and the cost of developing multimedia products; the rate of obsolescence; limited experience of use by teachers and learners; and the lack of user friendliness of packages and course delivery systems.

*Para 98* concluded that ‘the participation of transnational partnerships and networks in distance education will need positive stimulus within existing Community programmes’.

The response to the Higher Education and ODL memoranda will be discussed in a later section. As will be seen, the HE *Memorandum* was widely circulated throughout Europe and received much more attention than did the ODL *Memorandum*. Nevertheless, the combined impact of these documents, together with the insertion of the commitment to distance education in the Maastricht Treaty, reverberated through other policy documents for the following decade. The Maastricht Treaty will be discussed briefly in the next section.

#### 5.4.2.5 The Treaty Of Maastricht

The Treaty of Maastricht<sup>126</sup> is the most significant milestone in European distance education. The terms of the Treaty were negotiated over two Intergovernmental Conferences; agreed at the European Council meeting in Maastricht in December 1991; formally signed at Maastricht on 7 February 1992, and entered into force 1 November 1993. The Treaty effectively amended certain sections of the Treaty of Rome and added additional competences to the European Union, while also copperfastening the concept of subsidiarity as set out in Article 3b.

The Community shall act within the limit of the powers conferred upon it by this Treaty and of the objectives assigned to it therein. In areas which do not fall within its exclusive competence, the Community shall take action, in accordance with the principle of subsidiarity, only if and in so far as the objectives of the proposed action cannot be sufficiently achieved by the Member States and can therefore, by reason of scale of effects of the proposed action be better achieved by the Community. Any action of the Community shall not go beyond what is necessary to achieve the objectives of this Treaty. (Art 3b).

All subsequent Community actions have had to be justified in accordance with this article.

Among the additions were a commitment to social cohesion and solidarity (Article 2). However, the main area of interest to this thesis is the replacement of Articles 118 and other articles referring to vocational education with Title VIII Chapter 3 entitled Education, Vocational Training and Youth. According to Barnard

The inclusion of this new chapter in the Treaty has both real and symbolic importance: real importance for it represents a recognition of the work done by the Commission over several years; symbolic importance for it indicates the Community's priorities in the medium term (Barnard, 1995: 17).

Table 5.4 below outlines the text of Articles 126 and 127 concerning education and vocational training:

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<sup>126</sup> The text of the sections related to education and training may be found in Appendix 1 to this thesis.

**Table 5.4: Articles 126 and 127 of the Maastricht Treaty**

Article 126 (renumbered 149 in Amsterdam and Nice Treaties)	Article 127 (renumbered 150 in Amsterdam and Nice Treaties)
<p>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.</p> <p>2. Community action shall be aimed at:</p> <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> <p>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.</p> <p>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,</p> <p>acting by a qualified majority on a proposal from the Commission, shall adopt recommendations</p>	<p>1. The Community shall implement a vocational training policy which</p> <p>shall support and supplement the action of the Members States, while fully respecting the responsibility of the Member States for the content and organisation of vocational training.</p> <p>2. The Community action shall aim to:</p> <ul style="list-style-type: none"> <li>• Facilitate adaptation to industrial changes, in particular through vocational training and retraining</li> <li>• Improve initial and continuing vocational training in order to facilitate vocational integration and reintegration into the labour market</li> <li>• Facilitate access to vocational training and encourage mobility of instructors and trainees and particularly young people</li> <li>• Stimulate cooperation on training between educational or training establishments and firms</li> <li>• Develop exchanges of information and experience on issues common to the training systems of the Member States.</li> </ul> <p>3. The Community and the Member States shall foster cooperation with third countries and the competent international organisations in the sphere of vocational training.</p> <p>4. The Council,</p> <p>acting in accordance with the procedure referred to in Article 251 [formerly 189c] and after consulting the Economic and Social Committee and the Committee of the Regions, shall adopt measures to contribute to the achievement of the objectives referred to in this Article, excluding any harmonisation of the laws and regulations of the Member States.</p>

Source: 1992 Treaty on European Union; the Treaty of Maastricht Luxembourg: OOPEC.

The inclusion of Articles 126 and 127 (renumbered articles 149 and 150 in the Amsterdam and Nice Treaties) on education and training in the Maastricht Treaty was seen as evidence of consensus among the Commission President Delors and several member state governments on the key importance of education and training and the necessity to provide a firm legal basis within the subsidiarity framework of the Treaty (Corbett, 2003b; de Vocht, 1992: 17; O'Sullivan, 1992). The Irish Minister for Education informed the Dáil in 1992 that Ireland had tabled a motion on education policy



at an early stage of the negotiations on the new Treaty. We, therefore, claim a share of the credit for Article 126 which for the first time in the Community's history, confers a Community competence in the field of education. For the first time education has been put at the centre of the stage of European affairs.<sup>127</sup>

The Treaty spelt out the EU's competence in education and training in two separate articles, with the perhaps unintended effect of apparently reinforcing the boundaries between education and training (Field, 1998: 62). Table 5.4 above compares the two Articles, highlighting interesting differences in the way in which education and vocational training are treated. Both articles refer to developing exchanges of information and experience; mobility of students and teachers, or instructors and trainees; cooperation between educational establishments (Art 126), or between education and training establishments and firms (Art 127). However, Article 126 explicitly refers to quality education, the European dimension, recognition of diplomas and periods of study, and specifically 'encouraging the development of distance education'; surprisingly, none of these issues are touched on with regard to vocational training. Instead, Article 127 refers to a narrower conception of the role of a vocational training policy, restricted to improving initial and continuing vocational training in facilitating adaptation to changing labour markets arising from industrial change. This has led to the curious result that the Community's powers with regard to vocational education have become more prescribed than heretofore (Barnard, 1995: 20). Field asks 'Far from expanding the Union's competences, then, has Maastricht actually done the reverse? (Field, 1998: 61). One effect of this separation is the Commission's post-Maastricht programmes which divided along education and training lines.

There are often difficulties in tracing where a particular policy in the EU came from, with enquiries eliciting a common response that policies seem to come from nowhere (John, 2003; Richardson, 1996b: 17). Kingdon suggests that it is almost impossible to trace the origin of a proposal since 'this is not a river. There is no point of origin.' (Kingdon, 1984: 77). The author's attempts to identify the source of the inclusion of distance education in Article 126 of the Maastricht Treaty have met with similar results. Clearly, the idea of distance education was very much in the air during the period in which the treaty was being negotiated, however, the treaty was 'negotiated largely in secret' (Andersen and Eliassen, 2001; Bainbridge, 2002: 366). There was no reference to distance education in the preliminary draft treaty tabled by the Luxembourg presidency on 12 April 1991, however, the draft discussed on 18 June 1991 contained the distance education indent.<sup>128</sup> It is interesting to note that the term 'distance education' was chosen rather than the Commission's preferred term 'open distance learning' which perhaps indicates a certain amount of distance between the Commission and those drafting the Treaty. According to officials working in the Task Force at the time of the Treaty negotiations, those working close to the issue were 'shocked' and 'flabbergasted' when Article 126 was published.<sup>129</sup> As noted above, the Irish government claimed a share of the credit for Article 126, however, distance education is not listed among the proposals

which were accepted by our partners. These included developing the European dimension in education, particularly language teaching and dissemination, student and teacher mobility and cooperation between education establishments.<sup>130</sup>

<sup>127</sup> Dáil Eireann. Minister for Education, Mr Brennan. EC Summit Statements Vol 422 2 July 1992; however, Corbett notes that proposals on education were also received from Greece, Italy, Spain, Germany and Denmark (Corbett, 1993: 51).

<sup>128</sup> Richard Corbett, MEP, personal communication by email 1 March 2004.

<sup>129</sup> Interviews with Commission Official 23 September 2003 and Coen de Vocht 29 September 2003.

<sup>130</sup> Written answer from Mr Spring, Tánaiste and Minister for Foreign Affairs to question 48 asked by Mr Hogan, Dail Eireann Vol 433 7 July 1993. [asking the Minister to specify 'if there is any line in the Maastricht Treaty that has been the result of an Irish initiative].

The Secretary General of EADTU was particularly close on a political level to the Dutch Minister of Foreign Affairs during the treaty negotiations; in an interview he commented that distance learning was a 'hot topic' at the time; he indicated that, on behalf of EADTU, he may have 'sowed the seeds' of an idea through various meetings and communications with Commission officials as well as Dutch political figures, however, he was not in a position to confirm that he or EADTU had specifically requested that distance education be enshrined in the Treaty.<sup>131</sup> Certainly there is no evidence from EADTU documentation available for consultation to support a contention that the proposal emanated from EADTU. Field's comment on attempts to explain the Commission activities in education in the 1980s may be apt in this context 'At this date, when memories are already fading and archives are closed, we can only guess at the answer' (Field, 1998: 32).

If the passage of the Maastricht Treaty was the high point for distance education in Europe, the Commission was to spend the next few years working out how exactly the development of distance education was to be 'encouraged'. The next section will examine the responses to the Commission's policies and the first steps in developing a Community action programme on distance education.

### **5.4.3 CLOSING THE POLICY WINDOW: EMBEDDING ODL POLICY 1992-1993**

The period after the Maastricht Treaty was characterised by growing euroscepticism and deepening recession in European economies (Andersen and Eliassen, 2001: 7). The response to the memoranda on ODL and higher education, and the extension of the Community's powers in education and training in the Maastricht Treaty, comprised a mixture of excitement, hope, disappointment and disapproval, accompanied by a lack of consensus about the way forward for ODL in the European context. It took approximately two years of wide-ranging discussions and consultations to establish the first steps in encouraging 'the development of distance education'. During this period, views and responses were canvassed from a broad constituency of interest groups and stakeholders. The political institutions, including the Council of Ministers and the European Parliament engaged in discussion on Community action in ODL. Finally, a 'programme of encouragement' for ODL, albeit somewhat less far reaching than might have been expected, emerged from the Commission. This section will firstly outline how various stakeholders reacted to the Commission's ODL and HE memoranda; the response from the Council of Ministers and the European Parliament will then be described; the section will finish with an overview of the Commission's proposals for embedding ODL into the Community's education and training policies.

#### **5.4.3.1 Reactions And Responses: The Stakeholders**

The Commission's approach to disseminating the ODL and HE memoranda was somewhat different. The Portuguese Presidency organised a meeting of ODL experts in Coimbra in March 1992 to discuss recommendations for the Portuguese Presidency communication to the June 1992 European Council meeting and the Commission was reported to be 'helping to organise discussions on the [ODL] memorandum and the actions which should derive from it, with bodies, institutions and experts in the field of open distance learning' (Task Force Human Resources, 1992: 16). This somewhat low-key effort at consultation is in contrast with the more focused follow up on the HE *Memorandum* where all Member States, with financial assistance from the Commission had been invited to initiate discussions at major national or

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<sup>131</sup> Chris van Seventer Secretary General EADTU Interview 1 April 2004.

regional conferences.<sup>132</sup> In addition, the HE *Memorandum* was to be discussed, at the request of the Commission, by European organisations such as CHEEC, IRDAC, ETUCE, UNICE, and ERT who were invited to submit their reactions to the Commission.<sup>133</sup> Over 25,000 copies of the HE *Memorandum* were distributed with the IRDAC report to universities and higher education institutions, national and regional authorities and the economic and industrial world. Eighty meetings were held at national and European level, involving more than 8,000 participants (including teachers, administrators, students, government officials, representatives of industry and the social partners) (CEC, 1993b: 7). The EADTU noted that the political purpose of the ODL *Memorandum* was different to that of HE *Memorandum* which was designed to stimulate wide ranging debate, rather than concrete development strategies.<sup>134</sup>

#### 5.4.3.1.1 Reactions To The ODL *Memorandum*

The ODL *Memorandum* evoked a mixed response. Tait considers that it appeared to have an 'educative and persuasive function' (Tait, 1995: 22), while Field suggests that its proposals were 'considerably less radical than many open learning professionals had anticipated' (Field, 1998: 51). Other bodies identified 'gaps'; for example, the European Radio Television Working Group on Educational Programmes<sup>135</sup> pointed to lack of recognition of the potential of educational broadcasting by television or radio. EADTU saw the ODL *Memorandum* as an 'open invitation to push forward the European Open University concept and turn ambition into reality in the coming years'.<sup>136</sup> Hywel Jones was invited to make a presentation on the *Memorandum* at the EADTU Annual General Meeting in March 1992 which was described as 'an excellent platform from which to further inform debate on EC initiatives, particularly in terms of developing a concrete strategy for open and distance learning in Europe'.<sup>137</sup>

At the request of Ricardo Charters d'Azevedo from the Task Force, Horst Mohle interviewed experts attending the World Conference on Distance Education in Bangkok on their views of the ODL *Memorandum* (Mohle, 1993). In a somewhat impressionistic analysis of these views, Mohle reports on the concerns that distance education might become a 'political football', although there was agreement that EU endorsement had raised the profile and status of distance education in Europe. Surprisingly, although there was agreement on the need for a strategy for ODL, just half of the interviewees thought ODL should be included as a priority Community programme. However, interviewees suggested that an information campaign to publicise the *Memorandum* and the potential of ODL, as a way of breaking down resistance and prejudice was required. The need to ensure access to the disadvantaged should not be overshadowed by concerns with securing competitiveness, although experts predicted that ODL was likely to grow within a lifelong learning framework. There was widespread support for a European Open University based on a network of existing distance education institutions, rather than the creation of a new institution. There was some disagreement on the future direction of ODL; some saw convergence between ODL and traditional education leading to an improvement in teaching methods as well as making distance education socially acceptable, while others saw the two developing on parallel paths. Finally, all agreed that technology would change the way distance education would be delivered in the future.

<sup>132</sup> As described in the Task Force Human Resources magazine *Education & Training* April 1992; pages 14-16.

<sup>133</sup> Ibid. The Higher Education Authority organised four conferences in Ireland on the Higher Education Memorandum in 1992.

<sup>134</sup> EADTU *News* 9 January 1992.

<sup>135</sup> Martel, Lea 1993 Radio-television and new developments in the framework of open and distance education UER Working Group on Educational Programmes 30 April 1993 (quoted in CNED, 1993)

<sup>136</sup> Chris van Seventer Secretary General EADTU *News* 10 May 1992 p4.

<sup>137</sup> EADTU AGM 5-6 March 1992 Umea.

Generally, the response to the ODL *Memorandum* among ODL stakeholders was somewhat muted. However, this is not to suggest that there was a lack of response to the Community's ODL policies; the wider circulation of the HE *Memorandum* and the more targeted range of activities at a national level designed to stimulate debate on the issues raised in the *Memorandum* ensured that ODL was also discussed in each of the Member States as will be seen below.

#### 5.4.3.1.2 Reactions To The HE *Memorandum*

In all, 17 (EC and EFTA countries) countries submitted formal responses on the HE *Memorandum* (CEC, 1993b). Outside of the UK where some individual universities made submissions, most countries submitted a national response prepared by the relevant Ministry following consultation with various actors, together with, in some cases, responses from national higher education, student, business or professional networks. The submission from Ireland reflected the views gathered at a series of four national consultative conferences in 1992.<sup>138</sup>

Over half (44) of the submissions responded to the ODL section of the HE *Memorandum* (Eklund, 1993).<sup>139</sup> Interestingly, no comments on ODL were received from Spain (which has a large Open University), Luxembourg, Norway or Switzerland (the latter three did not have a significant distance education systems at that time). Surprisingly, the only distance teaching university to submit a response was the British Open University; and while a range of European higher education networks (CRE, EUCEN, EAN) submitted responses, ODL networks such as EADTU, SATURN, EUROSTEP or EUROPACE failed to do so. Given the commitment by the Commission to feed the views and reactions into the policy-making process, this is a curious omission on the part of the networks. It may be that some distance education institution responses were subsumed into the overall national reports (as in the Irish case). Analysis of the responses reveal mixed views among the stakeholders on the role and value of ODL itself, as well as the prospect of Community action in what had hitherto been a national arena.

Professor Claudius Gellert, European University Institute, Florence is quoted as stating that the chapter on ODL is a

good example of a general tendency in the *Memorandum* to state what is proposed should be introduced, without accompanying these statements with a critical analysis of the suggested changes (Eklund, 1993).

The responses concentrated largely on five main issues; the role of ODL in extending access to education; should ODL be mainstreamed or standalone? the cultural impact of large scale standardised ODL systems; technology and cost factors; and the role of the EU in distance education.

The Danish and Swedish responses cautioned against excessive expectations being placed on ODL, which is a means, not an end in itself. Several responses, in particular the Danes, supported mainstreaming ODL into existing higher education institutions, as opposed to providing ODL only through the open university system. However, some responses cautioned against replacing the traditional system aimed at full-time students, with distance education.

<sup>138</sup> The author participated in one of these conferences in Galway 17 September 1992.

<sup>139</sup> The following discussion is derived from an unpublished report on responses to the ODL proposals in the *Memorandum on Higher Education*, prepared on behalf of the Commission by Per Eklund.

None of the contributions found the idea of a European Open University to be an acceptable approach to ODL with a preference for national distance education institutions to develop programmes on their own or with others.

Many contributions referred to the diversity of distance education systems in the Member States in terms of structure, scale and maturity. The Irish contribution pointed out problems of uneven development, lack of standardisation, high start up costs and rapid obsolescence associated with multi-media products. The response from the Danish Rectors Conference<sup>140</sup> is an interesting reflection of the fears of small countries that adopting a common European approach to ODL could result in the domination of the distance education models of the big countries; in particular, the Danish were not in favour of the open university model:

although these are very professional, they are also highly industrialised large-scale operations with little room for communication oriented education, which might be considered more relevant in other national settings, [there is] good reason to be apprehensive about what may happen to a small country's niche production of distance education based on ideas of ordinary teaching and on a continuous dialogue between teacher and students and between students' if a transnational market in distance education modules emerges.<sup>141</sup>

Fears of foreign domination of national ODL markets were also expressed by the Portuguese, while there was much resistance to treating distance education programmes as commodities.

A number of responses cautioned against the risk of a technology driven approach to ODL. The AEGEE (Association des États Généraux des Etudiants de l'Europe) pointed out that online study on computer networks was expensive, and required substantial skills.

The Germans seemed most sceptical about the involvement of the EU: 'Germany does not see the need for the EC to take any action in relation to the development of open and distance education programmes' (CEC, 1993b: 47). Similarly, the Danish Confederation of Professional Associations suggested that using ODL to create a European dimension might constitute a violation of the subsidiarity principle. While the UKOU welcomed Commission support to develop European ODL it considered that measures had been too disparate and on too small a scale to make any real impact. There was general agreement that the areas of Commission involvement might include funding to develop course packages and promotion of positive attitudes to ODL by disseminating good practice; funding cooperative projects and publishing their outcomes; and funding programmes to train teachers and trainers in ODL. The need for direct funding of student participation was also highlighted with the UKOU suggesting the provision of bursaries under Erasmus or Lingua to students taking ODL courses in other countries.

Eklund rather optimistically summarises the growing interest in ODL from conventional universities

This could be the first sign of, in my view, a plausible future development in the field of higher education, where the best of the elements of conventional teaching are amalgamated with distance education, taking advantage of the possibilities different media offer to education and training (Eklund, 1993).

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<sup>140</sup> The Danish Rectors' Conference: The Danish institutions of higher education statement on *The Memorandum on Higher Education in the European Community*. Unpublished document submitted in response to the Task Force *Memorandum on Higher Education*.

<sup>141</sup> Ibid p19



While the ODL and HE memoranda were generating discussion and reactions among the stakeholders in European higher and distance education, the political institutions were also grappling with the issue of how to progress the distance learning agenda as will be seen below.

### 5.4.3.2 Political Initiatives

The topic of ODL was discussed at political level in the Council of Ministers and European Parliament on a number of occasions in 1992-1993. Analysis of the background documents to the Council resolutions and parliamentary debates suggests that while there was general agreement that ODL had great potential and something should be done, there was confusion and lack of clarity about what exact course of action could, or should be taken at European level, without compromising the subsidiarity principle. This section will examine some of the responses in the political stream.

#### 5.4.3.2.1 Council Resolution On ODL 1 June 1992

The Education Ministers having discussed the ODL *Memorandum* on 25 November 1991 ‘stressed the importance of this mode of education and training and invited the Commission to submit proposals in this field’ (Task Force Human Resources, 1992: 16). The Task Force and the Portuguese Presidency organised a meeting of ODL experts in Coimbra on 30-31 March 1992, which was attended by observers from DGXIII-DELTA, DGXXIII, and DGV to discuss the future structures for European distance education and proposals for Community action in ODL (Trindade, 1992). The delegates welcomed the ODL *Memorandum*, and stressed that there was a need for a European platform to discuss ODL; the ODL market could be stimulated through clearing house activities and improving access to information; the concept of EuroStudy centres was endorsed; training of trainers was encouraged; and the potential of ODL for other programmes (ERASMUS, LINGUA, FORCE) should be investigated.<sup>142</sup> One major recommendation was to provide information about the ‘state of the art and national policies concerning Open Distance Learning in the different Member States’. Based on the Coimbra conference discussions, the Rector of the Portuguese Open University, Armando Rocha Trindade, and the Chair of the Education Committee, Professor Luis Valadares Tavares prepared the first draft of a Council resolution on ODL on 7 April 1992 (Trindade, 1992: 133). In common with the Irish Presidency Note on distance education discussed above, the text of the Council resolution on ODL agreed on 1 June 1992<sup>143</sup> was radically different to the draft circulated to the Member States in May 1992.<sup>144</sup> This draft highlighted the role of ODL in meeting increasing demands for initial and continuing education in work and daily life, while also improving the accessibility and range of opportunities open to those unable to avail of conventional learning. It then proposed two objectives for community action: the development of a Europe-wide market for distance education and training through a series of measures aimed at removing obstacles and protecting consumers, and raising funds for ‘large scale transnational initiatives in distance education and training’; as well as the stimulation of actions to extend distance education and training to less favoured regions and social groups, workers excluded or in danger of exclusion from the labour market, and key economic sectors.

<sup>142</sup> Coen de Vocht Draft Report of the meeting of the National Expert Group on Distance Education and Training held on 31-3-92 in Coimbra (Portugal) Brussels 27 January 1993; circulated with papers for Expert Meeting on 1 February 1993.

<sup>143</sup> The main contributors to the debate were German Minister Ortleb, Dutch Minister Ritsen, and Italian Minister Ruberti (who later joined the Commission) EADTU *News* 10 May 1992 p7

<sup>144</sup> Circulated to NDEC by Department of Education 5 May 1992 (Oscail Archives).



The response from Oscail to the request from the Irish Department of Education for comments, expressed reservations about restricting funding to 'large scale' initiatives, calling for due recognition to be afforded to cultural and national differences and interests, while funding should also be provided for smaller national centres. Clearly, the Irish reservations were widely shared<sup>145</sup> as the final resolution<sup>146</sup> omitted any reference to an ODL market or to any specific actions. Instead, the Conclusions of the 1 June 1992 meeting<sup>147</sup> emphasised the importance attached to 'the development of open and distance learning in the context of mainstream education and training in the European Community'. ODL elements should be incorporated into appropriate Community education and training programmes, and should also be taken into account in the national discussions on the memoranda on higher and vocational education. The Ministers requested the Commission to formulate proposals in this area, bearing in mind the potential importance of the inclusion of the reference to development of distance education in the Treaty of Maastricht.

#### 5.4.3.2.2 Council Resolution On ODL 27 November 1992

Later that year, on 27 November 1992, the Ministers clarified criteria for Community action in ODL based on a paper prepared by the UK presidency.<sup>148</sup> Again this paper had undergone substantial redrafting by the time it reached the Council of Ministers. The first draft circulated in July 1992 highlighted opening up the ODL market in Europe; enhancing quality; extending ODL to further education and training; and mainstreaming ODL into all education and training provision as well as EU programmes.<sup>149</sup> Following a meeting on 24 September 1992, a second draft added 'enhancing skills of teachers and trainers', and sharing of existing expertise and experience of ODL in the Member States as a community priority.<sup>150</sup> The response from Oscail to this draft expressed concerns that opening up the market for ODL had the 'potential for undermining national and cultural identity in the weaker more peripheral countries'.<sup>151</sup> The resolution adopted by the Council of Ministers on 27 November 1992 differed substantially to the earlier drafts.<sup>152</sup> References to an ODL market were absent, although the UK presidency had 'prepared a note on the role of public and private providers of ODL for discussion by the Ministers after adoption of the conclusions'.<sup>153</sup> This note pointed out that while Member States were at varying levels of development in ODL, nevertheless some countries were 'seeking outlets in other Member States for open and distance learning' and asked the Ministers to give their views on this issue.

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<sup>145</sup> Communication from the Department of Education to NDEC 6 May 1992. 'Many thanks for your valuable comments. I attach for your information a new draft which I have just received by fax. Obviously the matter has been re-thought by somebody. Nevertheless, it's in the new Treaty and I'm sure the Commission will keep at it as indeed they are being invited to do in the latest draft' Oscail Archives.

<sup>146</sup> Conclusions of the Council and the Ministers of Education meeting within the Council of 1 June 1992 on the development of open and distance learning in the European Community OJ C 151/3 16 June 1992.

<sup>147</sup> Ibid.

<sup>148</sup> Conclusions of the Council and of the Ministers of Education meeting within the Council of 27 November 1992 on criteria for actions on open and distance learning. OJ C 336 p6 19 December 1992; Ricardo Charters d'Azevedo EADTU *News* 14 August 1993 p8.

<sup>149</sup> Presidency Discussion document prepared by the UK Presidency for the Education Committee Brussels 1 July 1992; SN 3355/92 EDUC.

<sup>150</sup> Draft Conclusions of the Council and Ministers on priorities and criteria for actions on open and distance learning; copy received in NDEC on 5 October 1992.

<sup>151</sup> Response from NDEC to Draft Conclusions 6 October 1992. Oscail Archives.

<sup>152</sup> Council and Ministers of Education meeting within the Council: Open and distance learning – draft conclusions and discussion note Brussels 20 November 1992 10230/92 EDUC 89; Conclusions published in OJ C336 19 December 1992 p6.

<sup>153</sup> Council and Ministers of Education meeting within the Council: Open and distance learning – draft conclusions and discussion note Brussels 20 November 1992 10230/92 EDUC 89

The resolution adopted focused on cooperation, consultation, and avoidance of conflict with existing developments. Community actions in ODL should: facilitate cooperation between ODL organisations; enhance ODL skills of teachers; emphasise the importance of quality, in particular in student support; and consider the contribution of ODL methods and technologies to conventional education; encompass post-secondary education and training in the universities and other institutions and organisations; and focus on users' needs. These actions should be developed in consultation with the Member States, as well as user groups, providers and transnational associations. Finally, the Ministers called on the Commission, with the assistance of national experts to review and report on current practice in ODL in the Member States, paying particular attention to ODL outside of higher education 'since these activities are least well known'.

Interestingly, the impact of this resolution was to shift the emphasis from supporting specialist distance education institutions to encouraging conventional institutions to adopt ODL. According to the Danish Minister for Education and Science the emphasis should be laid on students seeking to mix different modes of study 'In my opinion, this diminishes the need for special institutions which are primarily aimed at offering total degree courses under the open and distance learning scheme – at university level or lower level'.<sup>154</sup> Rather presciently, he wrote that the new technologies currently used in ODL would within a few years open up new possibilities for organising teaching and learning in the entire education sector.<sup>155</sup>

Thus, while the policy window had opened for distance learning institutions, it had also opened for all other education and training institutions.

#### **5.4.3.2.3 The European Parliament Response: The Pack Report 1993**

If the Ewing report was responsible for putting ODL on the European agenda, the Pack report could have been responsible for taking it firmly off the agenda. The European Parliament had interpreted the fields of action listed in Article 126 in the Maastricht Treaty as being examples rather than directives, although Katsirea regards this interpretation as incorrect (Katsirea, 2001). Doris Pack, a German MEP, in her draft report on distance learning to the European Parliamentary Committee on Culture, Youth, Education and the Media, expressed the view that the 'indents [in Article 126] are no more than examples of the overriding principle of the European dimension in education'.<sup>156</sup> Pack, although later to become a supporter of distance education,<sup>157</sup> at that stage held a strongly negative view of distance education.

As distance learning is merely given as an example in this connection, it follows that, despite all its undoubted socially positive aspects, distance learning does not enjoy any priority in the Community's action programmes and other educational measures. Only if and when the traditional methods of imparting knowledge can clearly not be applied indefinitely should the use of distance learning be considered. Otherwise, this form of teaching must, because of its psycho-social disadvantages (encouragement of anonymity,

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<sup>154</sup> Mr Bertal Haarder, Minister for Education and Science Denmark, *EADTU News* 12 January 1993 p11.

<sup>155</sup> *Ibid* p11.

<sup>156</sup> November 1992 Rapporteur Doris Pack. Draft report of the Committee on Culture, Youth, Education and the Media on distance learning and its future in the European Community PE 200.59L/8/rev.

<sup>157</sup> Interview with Commission Official 23 September 2003.

elimination of the school environment) take second place to the conventional methods based on personal interaction and group work.<sup>158</sup>

Pack found the Commission proposals in the ODL *Memorandum* as ‘not entirely satisfactory’, being far too wide-ranging and encroaching on subsidiarity. She strongly disapproved of the Commission’s proposals concerning open entry to distance education degree courses.

On no account, however can these diplomas be automatically included in the mutual recognition of university diplomas where a secondary school certificate is not an admission requirement. It would be an irresponsible attack on the Member States’ sovereignty in the educational sphere for them to be forced to recognise such diplomas as equivalent to university degrees.

The Commission’s proposals with regard to funding technology research were also unacceptable as she sees this as the responsibility of suppliers and an encroachment into the national industrial policy arena. She rejects the introduction of distance learning in the ERASMUS programme on the grounds that ODL could never compensate for actual mobility across borders. She questions the Commission’s optimistic view of the development of a distance learning market facilitated by the completion of the internal market. She points to the twelve different national education systems which would make such a market virtually impossible. She also objected to proposals for subsidisation of distance teaching suppliers, but favoured a strong regulatory environment (modelled on German legislation) to protect consumers and control the quality of private ODL providers.

The draft report was circulated to a number of ODL institutions and organisations for comment, and caused considerable disquiet among the ODL organisations including the newly formed distance education student network DOMUS which found the report unfriendly to students and extremely hostile to open access.<sup>159</sup> SATURN and DOMUS requested its members to lobby their local MEPs<sup>160</sup> to ensure that the negative arguments in the report were refuted. The Parliamentary Committee met with representatives of the ODL institutions on 28 April 1993 at which EADTU, SATURN, the FernUniversitat and the UKOU made presentations.<sup>161</sup> These representations appeared to have produced a more positive effect, as the Committee modified the resolution in the light of what they had heard.<sup>162</sup> The final motion adopted stated that ‘ODL is an efficient and cost effective alternative means of delivery of higher education, updating and training’.<sup>163</sup> Nevertheless, bodies such as EADTU were concerned that distance education continued to be regarded as a second class option, despite the support of the Maastricht Treaty.<sup>164</sup>

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<sup>158</sup> November 1992 Rapporteur Doris Pack. Draft report of the Committee on Culture, Youth, Education and the Media on distance learning and its future in the European Community PE 200.59L/8/rev.

<sup>159</sup> John Needham, Director Domus Network, report in EADTU *News* No 14 August 1993 p40.

<sup>160</sup> Needham Ibid.; SATURN response to Draft report of the Committee on Culture, Youth, Education and the Media on Distance Learning and its future in the European Community 14 April 1993; letter from Kay MacKeogh to Seamus O hUallachain, Department of Education 21 April 1993 (Oscail archives).

<sup>161</sup> Needham Ibid.; EADTU Minutes of EADTU Executive Committee Item 4, 14 May 1993 EA/MTW 21-6 MME (EADTU archives).

<sup>162</sup> Seamus O hUallachain, Department of Education personal communication to Kay Mac Keogh 17 May 1993.

<sup>163</sup> 1993 Resolution on distance learning and its future in the European Community OJ 0159 debated 12 & 15 July 1993.

<sup>164</sup> EADTU Executive Committee 15 October 1993, EADTU *News* 15 December 1993 p5.

### 5.4.3.3 Commission Actions On ODL 1992-1993

Following the ODL *Memorandum* the Task Force engaged in a number of activities designed to identify future directions for specific actions on ODL. De Vocht reported in 1992 that the Commissioner Mrs Papandreou had announced her intention to prepare concrete actions to support the development of ODL in the Member States and at Community level (de Vocht, 1992: 16). Charters d'Azevedo stressed that the central aim of Community action should be the wider adoption of ODL into the mainstream, opening up a market aimed at meeting users' needs, thereby calling for the formation of new consortia between industry and higher education and improved information flows for consumers.<sup>165</sup> In preparation for these actions, the Task Force commissioned a series of national reports on ODL and made proposals for an ODL 'encouragement programme'. Finally, on the 5<sup>th</sup> May 1993, the Commission produced its guidelines for community action in the general area of education and training. One key event which was to have an impact on the course of ODL policy was the departure in early 1993 of Hywel Jones to DGV.<sup>166</sup>

#### 5.4.3.3.1 National Reports On ODL

Following the June Council meeting in 1992 and in anticipation of the November Council's conclusions which invited the Commission 'to review and to report on current achievements in this field (open and distance learning)' the Task Force had written to the National Experts, commissioning reports on member state activities in the field of open distance learning.<sup>167</sup> These reports were to 'cover all levels and all sectors of education and training, in which provisions for open and distance learning exist' and were to be implemented between 2 February and 15 May 1993.<sup>168</sup> A common format for the reports was agreed at a meeting on 1 February 1993, and it was intended that the national reports would be synthesised into a single document. Although only seven of the twelve national reports had been received by September 1993, a synopsis was prepared for a workshop organised by the Task Force in Poitiers 7-8 October 1993.<sup>169</sup> This synopsis showed that the main policy objectives for ODL in the Member States at that time were access and participation; flexibility for individuals and society; educational productivity; quality; innovation; European dimension; and that several Member State governments were planning, or implementing 'actions and measures to promote open and distance learning in mainstream education and training'.<sup>170</sup> The final version of this report was not published until early 1996, when, arguably distance education in Europe had moved on from the heady post-Maastricht days (CEC, 1996b).

#### 5.4.3.3.2 ODL – An 'Encouragement Programme'

Ricardo Charters d'Azevedo presented the Task Force's ideas on a development strategy for ODL at the meeting of ODL experts in Brussels on 2 February 1993.<sup>171</sup> Described as 'An Encouragement Programme', the programme was to promote ODL for continuing and professional education; promote Europe-wide open distance higher education; establish local student support centres; and support European collaboration within existing networks. The action programme was to be assisted by an advisory committee comprising two representatives from each Member State and a group of ODL experts; the programme would:

<sup>165</sup> Ricardo Charters d'Azevedo EADTU *News* 14 August 1993 p8.

<sup>166</sup> Recorded in EADTU Executive Committee Minutes 14 May 1993.

<sup>167</sup> Letter from R Charters d'Azevedo, to C Curran 28 October 1992, Oscail archives.

<sup>168</sup> The author co-wrote the Irish report (see MacKeogh and Hogg, 1993).

<sup>169</sup> Coen de Vocht Draft Preliminary Conclusions from the National Reports on open and distance learning Brussels September 1993.

<sup>170</sup> Ibid p7.

<sup>171</sup> The author attended this meeting; the following is summary of the presentation at this meeting based on a copy of the slides which illustrated the presentation.

create data banks for exchange of information on ODL opportunities and products; facilitate the adaptation, transfer and cooperation of materials [sic]; stimulate cooperation between institutions and agencies involved in ODL; produce quality standards for training products and delivery systems; develop evaluation and accreditation mechanisms for ODL courses; achieve mutual recognition for ODL qualifications. The priorities for action included: opening up the market; enhancing quality; enhancing the skills of teachers, trainers and managers; using ODL to enhance mainstream education and training. It is interesting to note that these ideas were not translated to any extent in the Commission's guidelines on community action in education and training published a few months later.

#### **5.4.3.3 Guidelines For Community Action**

The Commission guidelines for community action in education and training (the Ruberti paper)<sup>172</sup> issued in May 1993, aimed to initiate debate on the future of community education and training programmes following their expiry in 1994. The guidelines established the groundwork for what became the Socrates and Leonardo da Vinci programmes, however, despite all the activity in the previous two years, ODL received very little attention in the guidelines. (CEC, 1993b: 8).

The paper ranged widely over a spectrum of issues related to education and training. It viewed European education as a means of personal and cultural development but emphasised that this view was to be 'enriched by the growing realisation that education and training is a vital component of economic strength and cultural development' (CEC, 1993a: 2). The extensive debate which had taken place since the publication of the three Commission memoranda<sup>173</sup> in 1991 had underlined the need to 'strike a balance between the cultural, social and economic importance of education to the development of our societies' (CEC, 1993a: 4). While respecting subsidiarity, the Community's role should be to encourage cooperation between the education and training systems; promote quality and innovation by exchanges of information and experience; and launch specific actions on a Community wide basis where there is a clear advantage over action only at national level (CEC, 1993a: 9). In one of the few references to ODL, the paper notes that it offers new opportunities for economies of scale, and exploitation of new technologies, citing the experience from the DELTA programme (CEC, 1993a: 10).

The paper proposed two main action lines designed to: reduce the fragmentation of the previous plethora of programmes; provide value for money; ensure articulation with national measures and facilitate more effective evaluation measures (CEC, 1993a: 12) The first action (later called Socrates), was aimed at actions related to universities, higher education and schools; the second action (later called Leonardo da Vinci) was aimed at training and qualifications (CEC, 1993a: 13). It is interesting to note that action on ODL is only referred to in the context of the Erasmus action, with the Commission recommending the use of ODL to deliver a European dimension to 'non-mobile students' (CEC, 1993a: 14). Thus, despite the expectations of a significant action on ODL following the round of consultations and activities, the first attempts at 'encouraging the development of distance education' were very modest indeed.

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<sup>172</sup> Commission Working Paper Guidelines for community action in the field of education and training, Com(93) 183 Brussels 5 May 1993

<sup>173</sup> The *Memorandum on Vocational Education and Training* had not discussed distance education.



#### 5.4.3.4 Flexible Responses?

At the end of 1993, the Belgian presidency and StOHO (the Belgian ODL consortium) with support from the Commission, organised a policy conference 'Flexible Responses in Higher Education' in the new European Parliament building in Brussels (de Vocht and Henderikx, 1993: 143). According to a Task Force official the aim of the conference was to bring traditional universities together with distance teaching universities to suggest concrete actions for the Commission.<sup>174</sup> The new Commissioner for education, Antonio Ruberti announced that distance education would be an important factor in the proposed new education and training programmes and that while awaiting approval of the new programmes, a preparatory action in ODL would be launched in early 1994 (Ruberti, 1993b: 18). Actions in ODL were linked with the technological imperative

we must succeed in exploiting the new technologies without losing our ability to master the process of teaching/learning and thus give a European dimension to the multifaceted and complex phenomenon of national and regional systems (Ruberti, 1993b: 19).

Despite the intentions behind the conference it was difficult to see what emerged from the conference and no formal message went to the Commission on specific actions.<sup>175</sup> Again, high expectations of action were met with disappointment.

### 5.5 CONCLUSION

This chapter has documented the emergence of ODL as a pivotal element of EU education and training policy in the early 1990s. Between 1987 and 1993 a stream of documents, reports, conferences, and seminars hammered home the message that ODL was the answer to training the European workforce in the skills required to meet global competition as well as contributing to social cohesion and the European dimension. The policy window that had opened in 1987 was closing by the end of 1993. The commitment to distance education in the Maastricht Treaty appeared to prove that ODL had emerged from the margins to the centre stage. However, towards the end of 1993 there were signs that the high expectations of ODL institutions and networks were to be dashed as the debate on action became diffused with concerns about structures, markets and technology. The next chapter will describe the way in which the conception of ODL changed in EU policy discourse during the remainder of the 1990s, as a series of new and not so new problems entered the policy arena.

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<sup>174</sup> Coen de Vocht Interview 29 September 2003; de Vocht was requested by the Belgian Presidency to organise the conference.

<sup>175</sup> Coen de Vocht Interview 29 September 2003.



## **Chapter 6: European ODL 1994-2004: Encouraged, Mainstreamed, Submerged?**

### **6.1 INTRODUCTION**

The previous chapter described the events of the six years when ODL was prominent in the Commission's education and training policy. This chapter argues that ODL's time in the sun was relatively short. During the mid-1990s, despite the high profile of ODL in policy discourse, the question 'is distance education going to vanish?',<sup>176</sup> began to surface, as the demand to extend distance learning methods beyond the traditional distance teaching institutions grew. An interviewee connected with the ODL networks commented that around 1994 'you could smell the change' in the climate for ODL.<sup>177</sup> While 1993/94 saw a change in personnel in the Commission with the departure of Jones in 1993 and de Vocht and d'Azevedo in 1994, the change was being driven by the emergence of a number of problems in the political and economic arena.

This chapter argues that the shift in focus away from ODL was the outcome of a series of problems which entered the political stream during the 1990s and which led to calls for radical change in the entire education and training system. Even while the Commission was debating on the actions to take to encourage the development of ODL in Europe, other areas of the Commission were preparing strategies to combat global competition from the USA and Japan. The discourse on growth, competitiveness and employment sparked off by the Delors White Paper in 1993 was to continue throughout the 1990s (CEC, 1993c). Another problem stream which had been in existence for some years entered full spate with the publication of the Bangemann Report on globalisation and the Information Society (CEC, 1994). Again, the Information Society (sometimes used interchangeably with the knowledge society) discourse dominated the 1990s and continues to do so. The lifelong learning concept had been around for many years, but the 1990s found it being adopted as a framework, not only for contributing to European competitiveness and the development of the Information Society, but also as a means of ensuring social cohesion, and developing a sense of European identity. Finally political developments linked with enlargement of the EU to the East, and the move towards greater integration and monetary union created their own demands on the education and training system. In all of this, traditional ODL began to seem old fashioned and out of step with the demands of the time.

This chapter discusses two phases in ODL policy development, starting with the 1994-1999 period which saw an expansion in both the problem and the policy stream and during which ODL slipped further away from the policy agenda, to be replaced with a focus on multimedia and ICTs. From 2000 policy makers effectively lost interest in traditional ODL as all levels of education were pushed to adopt the elearning agenda. By 2004, the term ODL was no longer used in policy discourse, and it was assumed that it had been mainstreamed and thus required no further 'encouragement'. Section 6.2 will examine how an expansion in the problem stream facing the EU led to a series of initiatives which greatly expanded the role of ODL, but which at the same time locked ODL into a technological pigeonhole, at least in EU discourse. Section 6.3 will discuss the way in which ODL has been, from one perspective, 'mainstreamed' into EU policies or 'submerged' from another perspective, a process which has both positive and negative consequences for the future of traditional distance education.

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<sup>176</sup> Question posed by Silvio Stoppoloni CUD in EADTU *News* 19 July 1995 pp15-18.

<sup>177</sup> Chris van Seventer, Former Secretary General EADTU Interview 1 April 2004.

## 6.2 EXPANSION IN THE POLICY AND PROBLEM STREAM 1994-1999

By 1994 disappointment was expressed at the slow pace of adoption of ODL. IRDAC argued that despite a

number of success stories, progress in open and distance learning has not been particularly strong across Europe, a regrettable phenomenon since the potential for a more flexible response to new demands of society is certainly there (IRDAC, 1994: 70).

According to IRDAC, barriers to European ODL included: poor quality image; low completion rates ('very few people ...end up with a degree'); unproven cost-effectiveness; lack of response to industrial needs; concentration in few institutions (most universities 'abstain' from ODL except in the UK); too much focus on knowledge, not skills; and the need for tutors for successful completion of studies (IRDAC, 1994: 71). IRDAC pointed out that the take up of technology based learning in the training area had been limited, in part due to the lack of maturity in the technology; and it called on all institutions to adopt distance learning methods (IRDAC, 1994: 71). As will be seen, the focus of Commission activities in ODL in the 1990s moved towards schools and traditional higher education institutions, with the emphasis shifting from *distance* learning aimed at off-campus students to *technology* based learning mainly for on-campus students.

This section will review the key documents and milestones defining the problem stream in the 1990s, and their impact on ODL, before examining the response of the Commission to these developments which ultimately resulted in the eclipse of ODL as defined in its earlier policies.

### 6.2.1 EXPANDING PROBLEM STREAMS

#### 6.2.1.1 Growth Competitiveness And Employment

During the early 1990s the EU grappled with problems of economic growth, Europe's weak competitive position vis-à-vis the US and Japan, and high unemployment coupled with skills shortages (Nihoul, 1999). The Gulf War had been followed by a downturn in the European growth rates which took longer than expected to recover (Charters d'Azevedo, 1991b: 6). Following discussion by the Heads of States and Governments of an analysis by Delors of the weaknesses of the European economies, the Copenhagen European Council in June 21-23 1993 had invited the Commission to present a White Paper on a medium term strategy to tackle these issues. The White Paper: *Growth, Competitiveness and Employment* was published at the end of 1993 with the aim to:

foster debate and assist in decision-making – at decentralized, national or Community level – so as to lay the foundations for **sustainable development** of the European **economies**, thereby enabling them to withstand international **competition** while creating the millions of jobs that are needed.' (CEC, 1993c: Preamble).

The White Paper identified education and training policy as a crucial element in tackling the problems facing Europe, but was at the same time realistic about what education and training alone could achieve:

There can be no doubt that education and training in addition to their fundamental task of promoting the development of the individual and the values of citizenship, have a key role to play in stimulating growth and restoring competitiveness and a socially acceptable level of employment in the Community. However it is essential to grasp the nature, extent and limits of this role. Given the economic and social problems they are facing today, which are cyclical in certain cases and essentially and more profoundly structural in

others, our societies are making many pressing and sometimes contradictory demands on education and training systems. [original emphasis] Education and training are expected to solve the problems of the competitiveness of businesses, the employment crisis and the tragedy of social exclusion and marginality – in a word, they are expected to help society to overcome its present difficulties and to control the profound changes which it is currently undergoing. ... however education and training should not be seen as the sole solution to the most urgent questions... It is only within certain limits, and in combination with measures in other areas (industrial and trade policies, research policy etc) that they can help to solve immediate problems (CEC, 1993c: 117).

The Report's emphasis on economic growth was accompanied by recognition of the problems of social cohesion and inequality, pointing out that forty million people in Europe were below the poverty line (CEC, 1993c: 16), and the exclusion of low skilled people risked the creation of a two tier society (CEC, 1993c: 93). Nihoul describes Delors' concern with a model of a social Europe where labour market skills were 'supplemented by values such as tolerance, justice, equity, respect for others and a sense of solidarity' and that the convergence of general education and vocational training was 'aimed not only at reducing certain malfunctionings within systems, but also towards inventing new forms of integration within society' (interview with Jacques Delors 1994, quoted in Nihoul, 1999: 117). There is an economic rationale to concerns with social and economic cohesion as it is considered that the Community as a whole will be more competitive if there are fewer disparities between groups and regions. However, Nihoul points out that the social cohesion agenda was not solely driven by economic concerns, rather 'it expressed the desire to soften the internal market approach and to achieve a harmonious and peaceful social order in Europe' (Nihoul, 1999: 117).

The White Paper made only passing reference to distance learning as helping to improve skill levels 'without the need for costly infrastructures' (CEC, 1993c: 81); it also mentioned that the lack of a 'genuine European area for open and distance learning' was a weakness in the European education and training system (CEC, 1993c: 122). It was widely regarded as one of the most influential policy documents ever produced by the Commission; in particular its impact was to broaden the scope of educational and training policy beyond the narrow economic rationale of pre-Maastricht, in the direction of lifelong learning and the learning and information society which in turn was to impact on the distance education agenda (Corbett, 2003b; Hingel, 2001; Nihoul, 1999; Waddington, 2002).

### **6.2.1.2 The Information Society**

The concept of the Information Society has informed much of the debate on EU policies since the 1990s to the extent that DGXIII was renamed DG Information Society in 2000 (Bainbridge, 2002: 133). Martin Bangemann, Commissioner responsible for ICTs produced a much discussed report on Europe and the global Information Society in 1994 (CEC, 1994). The report presented the Information Society as a positive development for the regions; it outlined the contribution of the EU to establishing a legal, technical and regulatory framework for ICTs to enable European industry to benefit from the ICT market (Bainbridge, 2002: 327). Distance education was presented in the context of providing services to SMEs, large companies, public administration as well extending distance learning techniques to schools and colleges.<sup>178</sup>

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<sup>178</sup> EADTU *News* 18 December 1994 p32-34.

The Information Society concept was adopted and discussed in a number of policy documents during the following years. The subsidiary title of the Commission's white paper on teaching and learning, published in December 1995 was 'Learning in the Information Society'; one of the three factors of upheaval identified in this document was the impact of the Information Society, leading to increased access to knowledge, but also the possibility of social exclusion (CEC, 1995b). The Green paper on the Information Society adopted what Field (1998) terms 'the discourse of crisis' to make the case for a substantial overhaul of the European education and training system, with the long term aim of developing

a new architecture of life long education and training, involving all parts of education and training systems, including schools, and designed and delivered in more appropriate ways, with particular regard to gender, but also by engaging more effectively older people and those with disabilities (CEC, 1996a: 19).

A shift from teaching to learning and self-directed learning using the new technologies was proposed as one of the four approaches to achieving this overhaul of the system.

The report 'Accomplishing Europe through Education and Training' prepared by an expert group working under the direction of the Commissioner Cresson was published in December 1996 and also addressed the issue of the Information Society (CEC, 1996d). The Report, described as 'highly provocative' (Field, 1998: 57), also called for a wide ranging overhaul of the education system. The chapter on Education and Training in the Information Society accepted that ITs would create major changes in the education and training paradigm, although at a slower pace than predicted since 'technological innovations become social innovations necessarily as slowly as the capacities of organisations and individuals are able to assimilate them' (CEC, 1996d: 62). The Report considered that the benefits of ITs outweigh the disadvantages 'provided IT is properly utilised and supported' (CEC, 1996d: 65).

In 1997 the Commission published the report of the High Level Expert Group on the Information Society. This group included the well known sociologist and expert on the Information Society, Manuel Castells, as well as Armando Rocha Trindade of the Portuguese Universidade Aberta. The group made wide-ranging recommendations on aspects of preparation for the Information Society, although little space was devoted to education and training. The Group noted the need to establish a European education network, linking schools, providing ICT to schools, and involving teachers. They suggested the establishment of a European Learning Agency and Network to promote and disseminate knowledge on leading edge applications of ICTs, as well as the need to produce high quality low cost materials (CEC, 1997b: 23). As will be seen, the Commission adopted the rhetoric of the Information Society in presenting its proposals on the way forward for education and training in the 1990s. The Commission communication 'e-Europe – an information society for all'<sup>179</sup> set out the basis for deliberations at the Council meetings in Lisbon in March 2000 and Feira in June 2000 which adopted the e-Europe Action plan and which in turn led to the adoption of the eLearning initiative. The Information Society and the concept of lifelong learning also became inextricably linked in the official discourse as will be seen below.

### **6.2.1.3 Lifelong Learning**

The concept of lifelong learning permeated much of EU policy rhetoric during the 1990s, although the idea had emerged as early as the 1960s among other transnational bodies including the Council of Europe, UNESCO and OECD (Hake, 1999). The Delors and

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<sup>179</sup> Commission Communication e-Europe – an information society for all COM(1999)687 December 1999.

Bangemann reports had referred to lifelong learning and the Green paper on the Information Society had stated that 'learning can no longer be limited to schooling. The information society will also be a knowledge society, in which the need for lifelong learning ...will be paramount.' (CEC, 1996a: 25). However, despite the rhetoric, some writers remain sceptical about the effectiveness of the EU's lifelong learning policy (Edwards and Boreham, 2003: 407; Field, 1996a; Hake, 1999). The White Paper on teaching and learning was criticised for paying lip service to lifelong learning with no concrete proposals in this area (Field, 1998: 75), and for restricting the significance of lifelong learning to employment and the economy (Field, 1997b: 6). The emphasis on initial and school education, to the detriment of achieving 'the grand goal of a transparent and dynamic system of lifelong learning across the European Union' was also questioned (Hake, 1999: 66 & 67). Nevertheless, the White paper was responsible for launching the European Year of Lifelong Learning in 1996, an idea originally mooted in the Delors paper (CEC, 1993c: 122). The White Paper called for a debate during the Year of Lifelong Learning on the creation of a learning society pursuing five objectives: 1) promoting the acquisition of new knowledge; 2) building closer relations between schools and business; 3) combating social exclusion; 4) creating language proficiency, and 5) treating capital investment and training investment on an equal basis. Field notes 'Compared with the ambition of the White Paper's title, these measures seem humble and conservative' (Field, 1998: 75).

The Year of Lifelong Learning was launched at a conference in Venice on 2 February 1996 and was designed to put lifelong learning firmly on the education and training agenda in Europe and in the Member States. The year was aimed at:

the personal development of individuals and their integration into working life and society, their participation in the democratic decision making process and their ability to adjust to economic, technological and social change.<sup>180</sup>

The Economic and Social Committee expressed the opinion that the Year of Lifelong Learning was 'a great idea bereft of sufficient funding'.<sup>181</sup> In the end, some 550 projects were funded, at a total cost of 4 mecu; of which 27% went to education and training organisations, with the remainder going to a mix of companies, public and voluntary organisations, youth, women's and senior citizens' groups and other groups (Chisholm, 1997: 10). The activities during the year included a DGXXII commissioned survey of public opinion on lifelong learning as well as 'a diverse range of activities throughout the EU including conferences, seminars, exhibitions, festivals and adult learners' weeks.' (Hake, 1999: 61). Field (1998: 79) found that demonstration projects had been effective in generating interest among the general public as well as Member States and the Commission thus ensuring that lifelong learning became accepted as an element of EU education policy goals. However, the impact on ODL was minimal in the absence of any specific focus on ODL during this very crucial showcase year of EU educational policy.

In 1997 Field dismissed the EU's lifelong learning policy as:

There is little evidence that the Union has an agenda for the learning society beyond a somewhat conventional picture of lifelong learning supplemented by technology. In this respect, the Union has opted as in so many other areas for a seemingly value-free, highly technologised solution to its extreme policy difficulties. This helps explain why the

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<sup>180</sup> Decision No 2493/95/EC of the European Parliament and of the Council of 23 October 1995 establishing 1996 as the European year of lifelong learning OJ L 256 26 October 1995.

<sup>181</sup> SOC/284 Mr van Dijk Rapporteur Opinion of the Economic and Social Committee on the Proposal for a European Parliament and Council Decision establishing 1996 as the European Year of Lifelong Learning (COM(94) 264 Final) 23 November 1994 Brussels.



Union's radical diagnosis has in practice led to somewhat modest policy proposals, why its idea of the learning society is poorly thought out, and why its content is so limited (Field, 1997b: 13).

Nevertheless, Hingel points out that during the short period between 1997 and 1999, major advancements were made in mainstreaming education into the employment and social cohesion policies of the Union (Hingel, 2001: 7). The European Council meeting in Luxembourg in November 1997 set in train the concept of lifelong learning as a horizontal objective of the European employment strategy comprising four pillars: employability, entrepreneurship, adaptability and equal opportunities.<sup>182</sup> A chapter entitled 'Developing skills for the new labour market in the context of lifelong learning' was included in the Council guidelines for Member States' employment policies; an objective of 'promoting and improving training, education and counselling as part of the lifelong learning policies' was included in the regulations for the Social Fund (Hingel, 2001: 8). The Treaty of Amsterdam<sup>183</sup> which emerged from the Intergovernmental Conference of 1996-1997 added a preamble stating that the EU is determined to

promote the highest level of knowledge for its people through broad access to education and its permanent updating.

The preamble was seen as further evidence of education and training moving centre stage (Reding, 2000). Nevertheless, despite evidence of a broadening of the rationale for education policies to encompass social and cultural as well as economic objectives following the Maastricht Treaty, Nihoul considers that the Amsterdam Treaty prioritised the economic argument which advocates 'the use of education policy as part of a human capital and lifelong learning strategy...[to meet] the goal introduced in the Amsterdam Treaty of achieving a competitive Europe of knowledge and employability' (Nihoul, 1999: 220).

After 1997, the Commission continued to develop and refine its lifelong learning strategy, ultimately leading to the publication of a memorandum on lifelong learning published in October 2000. This document will be discussed later in this chapter in the context of the follow up to the Lisbon agenda. As will be seen, the presence of ODL was more and more confined to the sidelines of policy, rarely mentioned and then usually in the context of the use of ICTs in education and training.

## **6.2.2 POLITICAL DEVELOPMENTS: ENLARGEMENT AND GOVERNANCE**

While the debate on the Information Society and lifelong learning were proceeding at EU level, a parallel stream of policy development was in process linked with changes at the political level, in particular posed by the prospect of significant enlargement of membership arising from the entry of the candidate states from Eastern and Central Europe, the prospect of monetary union, and consequent pressures on EU governance to adapt to the new political formation of the EU. Jacques Santer, President of the Commission presented a study entitled *Agenda 2000* on 16 July 1997, which was designed as the strategic blueprint for strengthening and widening the Union in the 21<sup>st</sup> Century. The document assessed the ten applicant states from Central and Eastern Europe and also underlined the need to develop new policies for growth, employment and competitiveness; it was agreed at the Berlin Council in March 1999 (Bainbridge, 2002: 8). The main focus of amendments in the Treaty of Amsterdam was to prepare for enlargement of the Community to encompass new Member States.

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<sup>182</sup> Council resolution 2002/C 163/01) of 27 June 2002 on lifelong learning OJ C 163 9 July 2002 p1-3.

<sup>183</sup> The Treaty was signed in 1997, and came into force in May 1999. Articles 126 and 127 of the Maastricht Treaty were renumbered 149 and 150 respectively although no amendments were made to the text.



The prospect of accession of the former communist states had seemed a remote prospect in the early 1990s when the PHARE programme of assistance was established. This programme funded a major project aimed at using distance education to address structural deficiencies in the education systems in the eleven states in Central and Eastern Europe between 1995 and 1999. However, the impact of Agenda 2000 and preparations for enlargement was to shift the focus of EU involvement in the programme from a multi-country aid basis, to assisting individual countries in their preparations for accession and to meeting the relevant *acquis communautaire* (MacKeogh and Baumeister, 2000: 16; Steinbeis Transfer Centre, 2001).

The prospect of enlargement also led the Commission to investigate new forms of governance in the EU (Hingel, 2001). In December 1999 the Council issued a short resolution outlining its proposals for a new form of community action programme in education and training, involving a 'rolling agenda'.<sup>184</sup> The conclusions cited the impact of the Amsterdam Treaty as well as the EU Agenda 2000 document in increasing the importance placed on education in policies related to employment and skills, competitiveness and employment. The 'development of a Europe of knowledge and the promotion of lifelong learning have become shared overall objectives'.<sup>185</sup> The Council concluded that political cooperation at European level needs to be reinforced and that new working procedures need to be introduced to ensure that the Council works effectively in the area of education and training. The solution was to introduce a 'rolling agenda' around priority themes over a series of Council meetings from the beginning of 2000. The policy themes which are suggested as part of the 'rolling agenda' include the role of education and training in employment policies; quality; recognition of qualifications; and mobility - all items which can be said to have been on the agenda since the start of the EU. Significantly, ODL is not mentioned. The rolling agenda constitutes a new form of decision making in the EU; Angelis and Grollios consider that this process has effectively downgraded the role of the Commission in policy formation, while upgrading the relationship between the Member States and the Council (Angelis and Grollios, 2003: 84). Interestingly, Hingel dates the increasing momentum in EU educational policy-making to the adoption of the 'rolling agenda' in that it facilitates the Member States' commitment to increasing the efficiency and effectiveness of policy-making in education 'without any overall agreement on what direction education in Europe would take' (Hingel, 2001: 14).

### 6.2.3 ODL AND MULTIMEDIA: COMMISSION ACTIONS AND INITIATIVES

The Commission's responsibilities under the Maastricht Treaty to develop actions to 'encourage the development of distance education' may have seemed reasonably clear. However, it became obvious within a few years of the Treaty that the conception of distance education had narrowed to a focus on multimedia and ICTs, albeit while extending the target group beyond adults in higher education to everyone in education and training in the broadest sense; schools, colleges, universities, community and voluntary groups, and community based institutions. If the Commission started by specifically targeting 'distance education' in its funding programmes, it ended the decade with a series of initiatives which barely mentioned the term ODL. These initiatives will be discussed below.

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<sup>184</sup> Council Resolution (2000/C 8/04) of 17 December 1999 on 'Into the new millennium': developing new working procedures for European cooperation in the field of education and training' OJ C 8 12 January 2000.

<sup>185</sup> Ibid.

### 6.2.3.1 ODL Action Programmes

While the details of the new coordinated action programmes proposed in the 1993 guidelines (CEC, 1993a) were being worked out, the first concrete action taken by the Commission to support ODL was a joint call for proposals ‘concerning a Community development and demonstration action in the field of open and distance learning’ launched in March 1994.<sup>186</sup> This was a joint initiative of DGXII, DGXIII and the Task Force and provided 3 MECUs for a maximum of four projects designed to ‘demonstrate and develop the possibilities for practical and effective open and distance education and training across the Community via demonstration projects linking the fields of education/training, research and telematics’.<sup>187</sup> This call was seen as a lead in to the proposed Socrates and Leonardo programmes due to commence in 1995. ODL and open and distance education and training were defined as

all forms of flexible study which do not rely on the physical presence of teacher and student for effectiveness, but which nevertheless benefit from the organisational and teaching input of an education or training establishment ...such flexibility can be expressed in a number of different ways, including at the level of course content, course structure, attendance requirements, study timetable and hours, teaching method, use of different media, pace of study, means of student support and proposed means of assessment (including recognition).

Interestingly, subsequent definitions have emphasised the technology, rather than the other characteristics of ODL. Open and distance vocational training is defined in Leonardo da Vinci Phase 2 as ‘the use of ICT techniques and services in traditional or modern form and support in the form of individualised advice and mentoring’; Socrates Phase 2 defines ‘open and distance learning as any form of flexible education, whether or not involving the use of information and communications technology’.<sup>188</sup> It is also interesting to note that the Economic and Social Committee in its opinion on the proposal for Leonardo da Vinci I on 23 March 1994 expressed reservations about the limited definition of ODL and training in the Leonardo decision which

excludes the traditional correspondence course which consists of a combination of written work material, a correction service and possibly direct instruction. This does not seem right, especially as the EEC treaty does not impose this restriction.<sup>189</sup>

The Leonardo da Vinci programme launched in 1994 supported ODL activities in the training sector; Socrates, launched on 14 March 1995<sup>190</sup> supported a separate action line for ODL aimed at supporting open distance learning, while large-scale technology-based projects were funded under the research framework programmes. The inclusion of a specific action line on ODL was not without controversy and was aided by lobbying from a range of organisations including Deutscher Volkshochschul-Verband (Field, 1996b: 23). The specific objectives of the programme included:

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<sup>186</sup> Joint Initiative DGXII, DGXIII and Task Force Human Resources, Education, Training and Youth Terms and requirements for calls for proposals concerning a community development and demonstration action in the field of open and distance learning March 1994.

<sup>187</sup> Call for proposals concerning a Community development and demonstration action in the field of open and distance learning OJ C78/15 15 March 1994.

<sup>188</sup> Decision No 253/2000/EC of the European Parliament and of the Council of 24 January 2000 establishing the second phase of the Community action programme in the field of education ‘Socrates’ OJ L 28 3 February 2000 p1-15.

<sup>189</sup> Mr Nierhaus, Rapporteur. Opinion of the Economic and Social Committee on the Proposal for a Council Decision establishing an action programme for the implementation of a European Community vocational training policy (Leonardo da Vinci) COM(93) 686 Final –SYN 494) SOC/269 23 March 1994.

<sup>190</sup> CEC Decision 819/95/CE.

- vi) to develop the use of communication and information technologies as a tool and a subject for education, including the use of multi-media materials and information, and telematics at all levels of education
- vii) to promote intellectual mobility of know how and experience, in particular through the development of open and distance education and learning at all levels of teaching.<sup>191</sup>

It is interesting to note that distance education is clearly distinguished from the use of technology in education, a distinction that failed to survive in subsequent Commission proposals.

The Commission was required to produce a report on results achieved in first two years of the new programmes.<sup>192</sup> 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, 2001c). 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.<sup>193</sup> Overall, some €33 million was expended on 166 projects under the ODL action in the period, with greater participation from traditional universities and schools than ODL institutions. Even though Socrates and Leonardo still had two years to run, the future of the ODL action under the Socrates programme was under threat, and it was only after a struggle that agreement for a separate action, originally to be called Atlas, and then renamed Minerva was agreed.

The Commission presented its proposals for the second phase (2000-2004) of the Socrates, Leonardo da Vinci and Youth programmes on 27 May 1998.<sup>194</sup> The Commission's proposals aimed to develop interaction between the programmes around a common framework of measures supporting mobility, both physical and virtual through ICTs; innovative pilot projects; development of cooperation at European level; promotion of linguistic skills; and improvement in sources of information on education and vocational training systems in the Community. Chapter 8 will analyse the impact of the implementation programmes on ODL developments in further detail.

In an address to the 1997 EDEN Conference in Budapest, the former Commissioner Antonio Ruberti summarised the EU contribution to ODL, reviewing the programmes and policies (Ruberti, 1997). Much of his presentation focused on the role of multimedia and educational technology, perhaps influenced by the turn in ODL policy in the mid-1990s when the multimedia stream appears to have captured the ODL policy stream. He summarised the particular problems in Europe with regard to using multimedia in education and training as low rates of interconnection of networks; a north-south imbalance in access; cultural resistance of teachers and inadequate training; and the linguistic, cultural and institutional diversity in the European Union (Ruberti, 1997: 8). He warns of confining research in multimedia to questions of technology, however necessary this is, citing the need to allow for

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<sup>191</sup> As listed in Mr van Dijk Rapporteur Information Memo on Opinion of the Economic and Social Committee on the proposal for a European Parliament and Council decision establishing the Community action programme 'Socrates' (COM(93) 708 final) 22 April 1994 Brussels.

<sup>192</sup> Joint statement by the European Parliament, the Council and the Commission concerning Decision 819/95/EC of the European Parliament and of the Council of 14 March 1995 establishing the Community Action Plan 'Socrates' OJ L 132 16 June 1995.

<sup>193</sup> Interviews with various key actors have failed to support this assertion since distance education is well embedded in Spain, Portugal and France.

<sup>194</sup> Bulletin EU 5-1998 1/10 Education, Vocational Training and Youth  
<http://europa.eu.int/abc/doc/off/bull/en/9805/p102097.htm> accessed 26 February 2004.

the emergence of new paradigms and models of teaching and learning; to investigate more wide ranging questions of what can be taught and what can be learned, as well as ethical issues (Ruberti, 1997: 10).

### 6.2.3.2 The Move To Multimedia

The Commission had set about the task of ensuring that technology and multimedia would be a focus of education and training programmes, starting in 1995, when Commissioners, Bangemann and Cresson set up six task forces in areas designed to facilitate European competitiveness, of which one was devoted to Educational Multimedia, designed to 'pool the efforts of the various Directorate Generals involved in multi-media education' (Gutierrez-Diaz, 2003). The main focus of the Task Force, directed by Michel Richonnier, and comprising Commission officials and specialists, was on developing the European multimedia industry in the face of competition from the USA.<sup>195</sup> Interestingly, a meeting of industrialists with the Multimedia Task Force called for priority to be given to universities and permanent education, an issue which Mme Cresson indicated would be dealt with in the forthcoming white paper on teaching and learning.<sup>196</sup> However, Ricardo Charters d'Azevedo (who had by then left the Commission to return to the Portuguese Ministry of Education) referred to past financial and educational catastrophes in the introduction of new technologies in the classroom. 'Our experience says that there is a big problem with the engineering of distance learning training programmes'.<sup>197</sup> As one Commission official commented, the Educational Multimedia task force was driven by the 'Martini' approach 'technology – anywhere, anytime'.<sup>198</sup>

The Task Force on Multimedia Software report<sup>199</sup> in 1996 concluded that Europe needed major educational software producers capable of benefiting from economies of scale and proposed a number of measures to be adopted within the framework of existing programmes. The Council, in welcoming the report urged the Commission to develop support activities on a European level.<sup>200</sup> In response, the Commission Action Plan 'Learning in the Information Society' published in 1996<sup>201</sup> proposed four priority areas: linking schools via electronic networks; encouraging the creation of educational materials of European relevance; training teachers in the new technologies; raising awareness of the educational opportunities of multimedia.

The Commission Action Plan had three principal objectives:

- accelerate entry of schools into the Information Society through new means of access to the world;
- encourage widespread application of multimedia pedagogical practices, and forming a critical mass of users, products and multimedia services;
- reinforce the European dimension through Information Society tools, while enhancing linguistic and cultural diversity.

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<sup>195</sup> Commissioner Edith Cresson. Meeting of industrialists with Commissioners Edith Cresson and Martin Bangemann, Educational Multimedia Taskforce 13 September 1995  
<http://www.ecotec.com/mes/en/verbat.html> accessed 25 February 2004.

<sup>196</sup> Ibid p 9.

<sup>197</sup> Ricardo Charters d'Azevedo ibid P15.

<sup>198</sup> Commission Official, Interview 1 April 2004.

<sup>199</sup> CEC 1996 Educational multimedia: first elements of reflection Brussels DGXIII

<sup>200</sup> OJ 6 July 1996 pp 8-11.

<sup>201</sup> Communication from the Commission to the Council, European Parliament, Economic and Social Committee and Committee of the Regions on 'Learning in the Information Society: Action plan for a European Education initiative (COM(96)0471).

The Action plan was criticised by the European Parliament Committee on Employment and Social Affairs for its focus on young people, ‘whereas it is precisely lifelong learning to which priority should be given in the information society’ and called on the Commission to pay attention to the problems of adults in coping with the new technologies and sources of information.<sup>202</sup> The Committee<sup>203</sup> expressed concerns about the possibility of enshrining disadvantage and called on the Commission to encourage the Member States to adopt quantitative goals with regard to provision of and access to new technologies in schools, a call which was endorsed in the eEurope action plan adopted in Lisbon in 2000. The Committee of the Regions<sup>204</sup> also expressed concerns about social divides being reinforced by new technologies and called for research on learning attitudes.

The Council resolution on educational multimedia software in the fields of education and training was agreed on 6 May 1996.<sup>205</sup> The resolution was largely concerned with on-campus students and pupils and does not explicitly refer to lifelong, or adult learners in the community. Distance learning is mentioned briefly in the context of encouraging research on distance learning and the design of multimedia software. The main thrust of the resolution is on the adoption and use of multimedia, training of teachers and trainers, increasing access to technology and pilot multimedia experiments.

The Multimedia Task Force launched a joint call in 1998 for projects involving six Community programmes: ESPRIT, Telematics Applications Programme, Targeted Socio Economic Research, TEN Telecom, SOCRATES and Leonardo da Vinci.<sup>206</sup> The outcomes of this call produced mixed results as resources were more depleted by budgetary and administrative procedures than expected (Gutierrez-Diaz, 2003). In a separate development, DGXIII also set up the Information Society Projects Office which was involved in education and training projects, providing incentives to providers to ‘enable providers to integrate global information tools and processes into their teaching.’ (Field, 1998: 181)

### 6.2.3.3 Towards A Europe Of Knowledge

In 12 November 1997, the Commission set out its guidelines for future Community actions in education, training and youth, for 2000-2006 in its document *Towards a Europe of Knowledge*.<sup>207</sup> The report stressed three dimensions of the European educational area: knowledge; citizenship; and competence. It recommended six actions, none of which explicitly targeted ODL: the virtual mobility action was to involve innovative uses of new information and communication technologies, promoting universal access to the new education tools by encouraging links in communication and information networks, and encouraging the production and dissemination of European multimedia goods and services which can be used in education and training.<sup>208</sup> As an indication of the extent to which the

<sup>202</sup> Rapporteur Birgitta Ahlqvist: European Parliament Committee on Culture, Youth, Education and the Media Report on the Communication from the Commission....on ‘Learning in the Information Society’ Action Plan for a European Education initiative (COM(96)0471 2 June 1997 A4-0200/97.

<sup>203</sup> *ibid.*

<sup>204</sup> 1997 Opinion of the Committee of the Regions of 16 January 1997 on Learning in the Information Society: Action plan for a European Education Initiative (1996-1998) (COM(96)471 Final) Brussels 22 January 1997 p6.

<sup>205</sup> Council resolution of 6 May 1996 relating to educational multimedia software in the fields of education and training OJ C 195 6 July 1996 8-11.

<sup>206</sup> DGXXII-A4 Working paper on Promotion of Open and Distance Learning (ODL): ODL in action: Current work and the way forward. 1998. p18.

<sup>207</sup> Commission Communication *Towards a Europe of Knowledge* COM(97)563 Final Brussels 12 November 1997.

<sup>208</sup> <http://www.europea.eu.int/scadplus/leg/en/cha/c11040.htm> accessed 13 May 2004.



ODL agenda had been eclipsed by the multimedia agenda, Dr Tom O'Dwyer, Director of DGXXII while addressing a UK Presidency conference on lifelong learning on the plans for the new actions, stated that

It is interesting to record when the SOCRATES programme was launched just in the beginning of '95, these two [i.e. internet-based resources and multimedia] seemed logically to belong in the somewhat specialised field of open and distance learning. Now a few short years later they are everywhere. (O'Dwyer, 1998: 2).

One might well have asked where was ODL in the new programmes beyond 2000? It was only after lobbying and negotiation between Commission officials and MEPs that a dedicated ODL action was adopted in the second phase of Socrates. According to a Commission official, the UK and Austria in particular were not in favour of a separate action; but some MEPs including Doris Pack and another Finnish MEP were supportive of a separate named action and this was eventually agreed.<sup>209</sup> By 28 August 1998, the Commission had included a named action, Atlas – Education and Multimedia in the proposed SOCRATES II<sup>210</sup> programme, albeit without reference to the term ODL which included:

projects to develop information services and systems on multimedia resources and communication systems to support the exchange of ideas and experience, including the networking of resource centres, experts, decision-makers and project coordinators on subjects of mutual interest (Par 2).

Concerns about the proposed programme were expressed by the Conference of Rectors (CRE) which welcomed:

initiatives to promote lifelong learning as well as open and distance learning. It is, therefore, a concern of the Confederation that both actions are vaguely described and that this vagueness will lead to disappointment. Much work needs to be done on the presentation in the proposal to ensure that good practice from the rapidly developing lifelong learning systems and open and distance learning initiatives of each Member State is brought together. The Confederation recommends that experts in the field are asked to contribute to proposals which can assist in the future dissemination of good practice',<sup>211</sup>

#### **6.2.3.4 The European Higher Education Space**

While debates on the next generation of programmes were taking place, another initiative aimed at developing a Europe of Knowledge through the development of a European higher education space was initiated with the Bologna declaration in 1999, the culmination of many years of cooperation between universities on a European level, initially outside the remit of the EU and then from the mid 1980s with support from programmes such as ERASMUS and COMETT (Corbett, 2003a). The Declaration was signed initially by or on behalf of 29 European Ministers<sup>212</sup> for Education (38 governments had signed by the Berlin Council Meeting in September 2003). The objectives included: comparable systems; two cycle bachelor/masters structure; ECTS credits; promotion of mobility; promotion of European cooperation in quality assurance; promotion of a European dimension in higher education (Bologna Declaration, 1999). The Bologna process has been adopted with enthusiasm by the European Commission which sees this process as a ideal example of a 'bottom up' initiative

<sup>209</sup> Commission Official. Interview, Brussels 23 September 2003.

<sup>210</sup> Commission proposal for a European Parliament and Council decision establishing the second phase of the Community action programme in the field of education SOCRATES (COM(98)0329).

<sup>211</sup> Statement of the Confederation of European Union Rectors' Conferences regarding the Commission's proposals concerning a new generation of education training and youth programmes (no date) <http://www.crue.org/eurec/netwyp.htm> accessed 26 February 2004.

<sup>212</sup> The Declaration was signed by Pat Dowling from the Department of Education and Science on behalf of the Irish Minister for Education.



which overcomes any obstacles of subsidiarity (Rakic, 2001). Paradoxically, while ODL was not part of the original thinking in the process, the themes emerging which revolve around questions of quality, transparency, structures and qualifications are leading the interlocutors to consider the potential of ODL or elearning.

### **6.2.3.5 ODL Disappears?**

Shortly after the Maastricht Treaty, Tait (1995) identified five main areas in which EU policy documents saw ODL as making a contribution: mobility; competitiveness; cohesion; European dimension; and improving quality. He concluded that ODL had moved from its early identification with open universities in the European Parliament resolution of 1985 to its

adoption by the Commission in a series of policy documents as a range of innovative technologies that are seen as central to the future success of the EU...we can expect to see ODL increasing in its importance, continuing to move out of the dedicated ODL institutions and being increasingly influential over conventional institutions and within industry (Tait, 1995: 34).

This appears to have been unduly optimistic. Instead, what appears to have happened is that the Commission concentrated its energies on ensuring that the conventional education and training system adopted these innovative technologies, rather than on promoting the objectives of ODL as spelt out in the ODL *Memorandum*: openness as regards entry requirements, flexibility as regards time, space and place, and course structures; and access and equity. While the Commission started with actions clearly aimed at 'encouraging' and supporting ODL, within a few years, it had switched to supporting 'multimedia' and ICTs, regularly justifying this approach in the context of the Information Society and the lifelong learning process.

## **6.3 MAINSTREAMING ODL 2000-2004**

As the previous section has shown, ODL had virtually vanished from the EU policy vocabulary by the end of the 1990s. Where it appeared in documents, it tended to appear as an aside, linked primarily with the use of ICT rather than with specific target groups or other objectives. This final section will review the policy streams in EU education and training policy development in the new millennium. As will be seen this period has been dominated by the Lisbon agenda, using lifelong learning as an overarching paradigm to inform education, training and employment policies. The Commission has adopted a new approach to policy-making, based on the identification of concrete objectives, benchmarking and the open method of coordination which involves much closer consultations with a broad range of groups including Member States, the social partners, and other stakeholders. The focus of education policy-making has been driven by the elearning agenda emerging from the Lisbon process, resulting in a separate action plan for elearning agreed at the end of 2003. Finally, plans for the new generation of action programmes in education and training were discussed at the meeting of the Ministers of Education in Dublin on 28 May 2004. ODL does not feature in any coherent way in these plans.

### **6.3.1 THE LISBON AGENDA**

The conclusions of the Lisbon Council meeting in March 2000 have had far reaching consequences for EU education policy (Hingel, 2001: 14). According to the Director General of DG Education and Culture<sup>213</sup>

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<sup>213</sup> The Task Force on Human Resources, Education Training and Youth had been subsumed in DGXXII in 1995; DGXXII was renamed DG Education and Culture in 1999.

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 (van der Pas, 2002: 6).

In addition to the usual challenges of globalisation, competition and demographic change, 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). The Lisbon conclusions set explicit aims and guidelines which Member States were expected to adopt in their education policies by 2010 including: increasing per capita investment in human resources; reduction by 50% of 18-24 year olds with lower secondary education who are not in further education; developing a European framework to identify new basic skills (IT skills, foreign languages, technological culture, entrepreneurship and social skills) to be provided through lifelong learning. The key conclusion of the Lisbon Council which has guided all EU policies since was:

Para 5. The Union has today set itself a new strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion.<sup>214</sup>

The Council proposed the new open method of coordination (OMC) in order to achieve its objectives (para 27). This method included fixing guidelines with specific goals; establishing quantitative and qualitative benchmarks; translating European guidelines into national and regional policies by setting specific targets and measures, and regular monitoring. The process was designed to include a wide range of bodies, the EU, Member States, Social Partners, and Civil Society. The OMC has had a significant impact on EU educational policy-making, with the Member States much more closely involved at all stages than hitherto, and, it is suggested, a corresponding loss of power in the Commission.<sup>215</sup>

### 6.3.2 LIFELONG LEARNING/LIFELONG TRAINING?

Given the commitment to the concept of lifelong learning it is perhaps surprising that it was not until October 2000 that the Commission produced a formal statement of its policy on lifelong learning at the request of the Lisbon Council (van der Pas, 2001: 12). The *Memorandum on Lifelong Learning*<sup>216</sup> was published in October 2000 following a series of consultative meetings with experts and stakeholders.<sup>217</sup> Rubenson (quoted in Schemmann, 2002) contended that the *Memorandum* signals a paradigm shift by broadening the exclusive economic concern that used to dominate through introducing active citizenship as a major goal. The *Memorandum* proposed the widest possible definition of lifelong learning, to include 'all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence' (CEC, 2000e: 3). Learning is defined as a continuous process encompassing all forms of formal and non-formal learning, and at any age or stage in life. The *Memorandum* proposed six key messages for debate: 1) access to basic skills; 2) investment in human resources; 3) innovation and flexibility; 4) new forms of qualifications; 5) information and advice; and 6) bringing learning closer to home. Distance learning was mentioned in the context of the sixth 'message' with the example given of introducing local learning centres, and using ICTs to open opportunities for distance learning

<sup>214</sup> Presidency Conclusions: Lisbon European Council 23 and 24 March 2000  
<http://ue.eu.int/newsroom/> accessed 12 March 2004.

<sup>215</sup> Various interviewees have suggested that the Commission is less powerful than in the early 1990s.

<sup>216</sup> Commission Working Document A memorandum on lifelong learning Brussels SEC(2000)1832 30 October 2000.

<sup>217</sup> The author participated in a policy input seminar in Brussels on widening access to lifelong learning. 28 June 2000.

to people in remote locations, or whose disabilities prevent them from participating in traditional forms of education.

The *Memorandum* launched a wide debate at European and Member state level.<sup>218</sup> The European Parliament, European institutions, social partners, European NGOs were consulted, and a series of conferences were held to discuss the Memorandum's six key messages; in addition, Member States were required to hold national consultation processes involving the views of actors in youth, education, training, employment and social exclusion sectors (Gutierrez-Diaz, 2003; van der Pas, 2001). Lifelong learning was henceforth to be the overarching framework for subsequent EU policy and actions (van der Pas, 2001).

The Commission followed up the *Memorandum* with a communication on 'Making a European area of Lifelong Learning a Reality' in November 2001.<sup>219</sup> The Council resolution on lifelong learning of June 2002<sup>220</sup> adopted the Commission proposals, stressing that lifelong learning must cover:

learning from the pre-school age to that of post-retirement, including the entire spectrum of formal, non-formal and informal learning. Furthermore, lifelong learning must be understood as all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competencies within a personal, civic, social and/or employment-related perspective. Finally the principles in this context should be: the individual as the subject of learning, highlighting the importance of an authentic equality of opportunities and quality in learning.

Despite this broad all encompassing definition, the Council Conclusions on 'Development of Human Capital for social cohesion and competitiveness'<sup>221</sup> of November 2003 reiterated the link between human capital development and education and training policy in the context of lifelong learning:

the objectives set in education and training policy should ... increasingly complement those of economic and labour policy in order to combine social cohesion and competitiveness.

ODL did not feature explicitly in any of the documents in the lifelong learning framework.

### **6.3.3 THE CONCRETE FUTURE OBJECTIVES APPROACH**

The 'Concrete Future Objectives' approach adopted by the Lisbon process was in line with the new open method of coordination, involving the establishment of guidelines and benchmarks. The Lisbon presidency conclusions had asked the Education Council to

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<sup>218</sup> Council resolution No 2001/C 204/01 of 13 July 2001 on the role of education and training in employment related policies OJ C 204 20 July 2001 p1-2.

<sup>219</sup> Commission Communication Making a European area of lifelong learning a reality (COM(2001)678 Final) 21 November 2001 <http://europa.eu.int/comm/education/life/index.html>..

<sup>220</sup> Council resolution no 2002/C 163/01 of 27 June 2002 on lifelong learning OJ C 163 9 July 2002 p1-3.

<sup>221</sup> Council conclusion NO 2003/C 295/05 of 25 November 2003 on the 'Development of human capital for social cohesion and competitiveness in the knowledge society OJ C 295 5 December 2003 p9-10.

undertake a general reflection on the concrete future objectives of education systems, focusing on common concerns and priorities while respecting national diversity, with a view to ... presenting a broader report to the European Council in the Spring of 2001.<sup>222</sup>

The Member States contributed to a process of identifying national objectives in education policies in the context of the EU and the Commission produced a summary report<sup>223</sup> listing six common objectives: 1) raising the standard of learning in Europe; 2) access to lifelong learning; 3) basic skills for the knowledge society; 4) opening education and training to Europe and the world; 5) making best use of resources; and 6) new partnerships with schools. This report represents an important departure from the previous policy focus in that Member States were required to recognise that they were facing similar challenges and needed to adopt common objectives to meet these challenges (van der Pas, 2001). The European Parliament welcomed the document as a major step but stressed the need to provide funding, possibly from the Member States, in order to realise these objectives, while respecting the subsidiarity principle.<sup>224</sup> Angelis and Grollios suggest that the move away from the emphasis on European structures to meeting common objectives for educational systems creates the possibility of improving the efficiency of some sectors of European economies, thus, indeed making Europe more competitive, while also potentially increasing the divergence of education systems in the Member States (Angelis and Grollios, 2003: 92). The key difference in policy orientation is that Member States at unequal levels of development are being given equal objectives to meet, but without any significant Community funding (Angelis and Grollios, 2003: 92).

The European Council in July 2001<sup>225</sup> reduced the Commission's proposed objectives to three: 1) improving the quality and effectiveness of education and training systems in Europe; 2) facilitating access of all to education and training systems; and 3) opening up education and training systems to the wider world. A detailed workplan was agreed which instilled a sense of urgency into achieving the objectives by the Lisbon deadline of 2010. However, by November 2003, concerns were expressed at the slow pace in attaining the objectives set in Lisbon 'A wake up call is therefore essential at all levels if there is still to be a chance of making the Lisbon strategy a success'.<sup>226</sup> The Commission suggested four 'levers' for reform, including the development of coherent lifelong learning strategies. While the proposals for making lifelong learning a reality include increasing the percentage of the adult population between 25 and 64 participating in education and training, as well as the percentage of adults with less than upper secondary education who have participated in any form of adult education or training, there are no references to ODL, elearning or indeed, ICTs in achieving these goals.<sup>227</sup>

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<sup>222</sup> Presidency Conclusions: Lisbon European Council 23 and 24 March 2000  
<http://ue.eu.int/newsroom/> accessed 12 March 2004, Para 27.

<sup>223</sup> Report from the Commission: The concrete future objectives of education systems. COM(2001)59 Final Brussels 31 January 2001.

<sup>224</sup> Doris Pack European Parliamentary Debate 14 May 2001 New technologies in tomorrow's education <http://www.europarl.eu.int/> accessed 20 February 2004.

<sup>225</sup> Council Conclusions No 2001/C 204/03 of 13 July 2001 on the follow-up of the report on concrete future objectives of education and training systems OJ C 204 20 July 2001 p6-7; and Education Council report to the European Council on the 'Concrete future objectives of education and training systems' <http://register.consilium.eu.int/pdf/en/01/st05/05980f1.pdf>.

<sup>226</sup> Communication from the Commission: 'Education & Training 2010': The success of the Lisbon strategy hinges on urgent reforms' COM(2003)685 Final 11 November 2003. p4.

<sup>227</sup> SCADPLUS Concrete future objectives of education systems. Last updated 17 June 2003;  
<http://europa.eu.int/scadplus/> accessed 7 July 2004.

### 6.3.4 THE ELEARNING INITIATIVE

The Commission had prepared a preliminary report<sup>228</sup> for the Lisbon council on *Designing Tomorrow's Education* in January 2000. Education was accepted as one of the pillars of the Lisbon strategy and the Commission set to work with remarkable speed in developing actions to implement the Lisbon process in education, despite reservations about the capacity of the educational system to fund these new initiatives.<sup>229</sup> The adoption of the term 'elearning' for the EU's initiative is attributed to a Commission official, André Richier; it was agreed that the term encapsulated the intent of the rather less snappy concept of 'promoting innovation with new technologies' which had been the draft title of the action.<sup>230</sup> The Commission launched its first set of proposals for elearning in May 2000.<sup>231</sup> This Communication set elearning purely in the context of integrating ICT in education and training, and recommended four lines of action based on equipment, training, multimedia contents and services and networking of centres for acquiring knowledge. The European Parliament criticised the Commission and the Council for its minimalist approach to funding its strategies and projects 'If we say that eLearning is important, and we stress that it is, then there must also be a programme with the proper financial resources'.<sup>232</sup> The Council adopted the Commission's eLearning Action Plan<sup>233</sup> on 13 July 2001.<sup>234</sup> The outcomes of the elearning action plan will be discussed in Chapter 8.

At the end of 2003 the European Parliament and Council adopted the *eLearning* action Programme 2004-2006 'for the improvement of the quality and accessibility of European education and training systems through the effective use of information and communication technologies' (CEC, 2003a). As an indication perhaps of the level of pressure on Commission officials arising from extended consultation procedures, the official responsible for drawing up this plan had produced 82 versions of the document in September 2003.<sup>235</sup> The specific areas of intervention included promoting digital literacy 'in particular for those who, owing to their geographical location, social situation or special needs do not have easy access to these technologies'; European virtual campuses with a view 'to better integration of the virtual dimension in higher education to encourage the development of new organisational models for virtual campuses and for virtual mobility'; etwinning of schools and training of teachers; and transversal actions (studies, conferences, monitoring actions).

The call for proposals for the eLearning Action Plan was issued by the Commission on 26 April 2004.<sup>236</sup> This call defined elearning as 'the use of new multimedia technologies and the Internet to improve the quality of learning by facilitating access to resources and services as well as remote exchanges and collaboration'. The call described the objective of the programme as 'to support and develop further the effective use of ICT in European education and training systems, as a contribution to a quality education and an essential element of their

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<sup>228</sup> 2000 Report from the Commission to the Council and European Parliament: *Designing Tomorrow's Education: Promoting Innovation with new technologies* COM(2000)23 Final 27 January 2000

<sup>229</sup> Commission Official DGEAC Interview 22 February 2001.

<sup>230</sup> Commission Official DGEAC Interview 17 May 2004.

<sup>231</sup> Commission Communication e-Learning: *Designing tomorrow's education* COM(2000) 318 Final Brussels 24 May 2000.

<sup>232</sup> Doris Pack European Parliament Debate 14 May 2001 *New technologies in tomorrow's education* <http://www.europarl.eu.int> accessed 20 February 2004.

<sup>233</sup> Commission Communication: *The elearning Action Plan – Designing tomorrow's education* COM(2001) 172 Final Brussels 28 March 2001.

<sup>234</sup> Council Resolution No 2001/C 204/02 of 13 July 2001 on e-Learning OJ C 204, 20.7.2001 p.3-5.

<sup>235</sup> Commission Official DGEAC, interview 23 September 2003.

<sup>236</sup> DGEAC 2004 Call for proposals elearning programme DGEAC/26/04.



adaptation to the needs of the knowledge society in a lifelong learning context'.<sup>237</sup> The call lists four specific objectives: awareness raising; enhancing the European dimension; development of products and services; and innovation in teaching methods.

The possibility of a new elearning market in Europe attracted the attention of some large IT and elearning organisations<sup>238</sup> which organised an 'elearning summit' on 10-11 May 2001 in La Hulpe, Belgium, with the aim of accelerating the slow pace of adoption of multimedia in Europe (European eLearning Summit, 2001: 2). Over 350 participants from public and private sectors attended; including policy makers from ministries of education and employment, senior EU officials, and representatives from IT, telecommunications, audio-visual, training, broadcasting and publishing industries. The summit produced a ten-point action plan aimed at stimulating the implementation of the elearning market. The tenth point recommended adopting public private partnerships, which still remains a relatively untried phenomenon in European education. The meeting led to the formation of the European eLearning Industry Group (eLig); however according to a Commission official the industry's initial optimism about the potential of an elearning market has waned in the face of low levels of funding available in the Member States.<sup>239</sup>

That the university system did not share the same level of enthusiasm for elearning as did the Commission is encapsulated in the HECTIC (Higher Education Consultation in Technologies of Information and Communication) report on EU policies and elearning in the universities which noted that 'significant perceptive, conceptual and practical frictions exist between the two worlds of policy objectives and educational developments' (Coimbra Group, 2002: 5). Another view is that 'in the time leading up to the June 2000 Lisbon European Summit, the world lived in a kind of euphoria' arising from what was expected to be a period of uninterrupted economic growth driven by ICTs (Floor, 2003: 34). The education world watched these developments with mixed feeling; on the one hand ICTs offered great potential, however

on the other hand many stakeholders felt themselves too much under all kinds of government pressures to address rationalisation, quality issues, access for underprivileged groups of the population, improved teacher training, follow-up of the Bologna Declaration etc and could not cope with (seemingly) unrelated aspects of ICT implementation on top of that (Floor, 2003: 35).

The 'dot.com' crisis in early 2000 further weakened confidence in the potential of ICT, with some institutions wanting to 'forget about ICT for some time and solve immediate problems' (Floor, 2003: 35).

### **6.3.5 NO LONGER A COMMON THEME?**

The Irish Presidency hosted a conference on 'Towards 2010 – Common themes and approaches across higher education and vocational education and training in Europe' on 8<sup>th</sup> March 2004 (Deane and Watters, 2004a). The Presidency selected four themes for analysis: transparency; credit transfer; quality; and qualifications framework (Deane and Watters, 2004b). It is interesting to note that in the lengthy background research report commissioned for the conference, distance education is mentioned only once in the context of modularised courses and credit transfer (Deane and Watters, 2004b: 48), and the terms ODL and elearning do not appear at all. It is suggested that ICTs 'may' make a significant contribution in facilitating flexibility with regard to time and location, and individual needs (Deane and

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<sup>237</sup> Ibid. p.1.

<sup>238</sup> IBM, CISCO, Nokia, SanomaWSOY, Smartforce

<sup>239</sup> Commission Official, DGEAC, Interview Brussels 1 April 2004.



Watters, 2004b: 21). The Irish Department of Education official responsible for coordinating the education policies of the Irish presidency confirmed that he had not heard ODL being mentioned as an issue for many years, and in contrast with the 1990 presidency, ODL had not surfaced as a possible theme in the lead up to the 2004 Presidency.<sup>240</sup> Thus, it would appear that from a time in the early 1990s when every policy document appeared to be required to make some gesture towards the Treaty commitment to encourage distance education, this commitment had disappeared from the policy agenda for the enlarging community in the 21<sup>st</sup> century.

## 6.4 SUMMARY AND CONCLUSIONS

The evolution in EU thinking on ODL in the seventeen years between the European Parliament resolution on Open Universities in 1987 and the adoption of the elearning action plan and the publication of the Commission's plans for the next generation of action programmes in 2004 has been outlined in this and the previous chapter. The key question informing this analysis has been 'Has the EU succeeded in encouraging the development of distance education in Europe?' The proposals for the new generation of action programmes in education and training from 2006 make no provisions for an action on ODL or indeed elearning (CEC, 2004a) and interviews with several Commission Officials confirmed that this was a policy choice. ODL and elearning were, in 2004, no longer priorities on the Commission agenda. Indeed, some officials appeared surprised to be reminded that ODL was ever a priority policy in the first place.

As Chapter 5 demonstrated, between 1987 and the end of 1993 a policy window stayed open for distance education during which there was a constant stream of reports, memoranda, conferences, and meetings identifying problems to which distance education offered a solution. While the precise mechanism through which distance education was inserted into the Maastricht Treaty remains unclear, the fact of its commitment to 'encouraging the development of distance education' was an undoubted high point for distance education, lending this method of education a stature and profile which was perhaps out of scale with its actual potential to resolve the many problems laid at its door in the long run. Yet, there were subtle signals that traditional ODL, with its focus on widening access to students off campus was disappearing from the agenda as ODL methods (mainly defined as the use of technology) were adopted and incorporated into traditional education systems.

In the two years after Maastricht the Commission investigated strategies for embedding ODL in the Commission education and training policies, emerging with the first set of proposals for an 'encouragement programme' at the end of 1993. However, as happens in the political process, a series of new and renewed problems engaged the attention of policy makers: problems of growth, competitiveness and employment; the Information Society and lifelong learning; political changes within the EU itself arising from enlargement and changes in governance. The explosion of the Internet and the world wide web, offered new challenges and opportunities in all areas of life – industry, commerce, entertainment, education; it was thus not surprising that attention was increasingly drawn away from ODL to the new ICTs. By the end of the 1990s 'innovation' was firmly linked with the use of ICTs in education and training, and gradually, despite the focus on lifelong learning, the traditional classroom or campus-based institutions found themselves the target of EU policy as it attempted to persuade them to adopt ICTs in teaching as a means of preparing students for the Information Society.

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<sup>240</sup> Sean Harkin, International Section Department of Education and Science Interview 12 May 2004.

By 2000, the term elearning had virtually replaced ODL in EU discourse, as the technology element of ODL became dominant and the focus switched to schools and campus-based education and training. The Lisbon Process in 2000 sparked off a new drive to make Europe the most competitive economy in the world, and elearning was adopted as a key pillar in attaining this strategy. Other strategies included setting concrete objectives for education systems to be achieved by Member States agreeing to adopt a series of benchmarks. By 2004, the term ODL was heard infrequently in the Commission, and it was not thought necessary to include any specific action aimed at supporting ODL in the proposals for the new generation of action programmes leading to 2010.

Despite claims that the new elearning drive has recognised ‘the need to move beyond the technocratic view of technology and education’ (Reding, 2003a) there is little evidence to show that the rhetoric mirrors the reality. The new ICT action will once again focus on ‘innovative’ uses of the new technologies, while the other actions in the proposed programmes have no specific proposals to meet the special needs of adult students studying at a distance from the home campus. There may be good arguments to support the multi-million Euro programmes testing out high-risk next generation technologies which may never be implemented. However, this means that there is no space to encourage testing and embedding good pedagogical practice through using the affordable, accessible technologies which are available to current ODL practitioners and students operating in the world of today. It is acknowledged that many national governments are funding precisely such efforts (for example the Higher Education Authority in Ireland) on a national level. However, the fact that national governments have an involvement does not mean that there is not a major role for the EU in championing ODL. In the absence of an EU role, the scope for the European dimension and transnational exchange of ideas and expertise is reduced if not lost entirely.

The information and communications technologies (ICTs) have transformed many aspects of economic and social life in the latter part of the twentieth century and it is clear that education must prepare students to work in a society that requires technological literacy. The European Union has certainly encouraged experimenting with the use of technology in education, however it cannot be said that it has sufficiently encouraged the use of distance education in the Community.

Of course one must also ask if it matters that distance education has disappeared from the EU agenda, since distance education enrolments in Europe have continued to grow and there is a flourishing academic community contributing to research and development in the area. Perhaps one can refer to the literature on the gender mainstreaming process, where every EU policy must now be gender-proofed (Pollack and Hafner-Burton, 2000). Such policies generate advantages and potential disadvantages, as, paradoxically, when the problem becomes everyone’s responsibility, then no one has responsibility. Certainly, the assumption in the Commission is that ODL has been mainstreamed in the overall education, training and employment policies of the EU.<sup>241</sup> However, given that the EU conception of ODL is weighted more to its technological characteristics than its other characteristics of access, openness, flexibility, pedagogical innovation, even cost-effectiveness, the consequence is that the mainstreaming of ODL in traditional education is less likely to transform the system into the type of responsive flexible system required to implement the knowledge and Information Society in the context of lifelong learning. As one interviewee<sup>242</sup> commented, adoption of ICTs has allowed the universities to hide behind the ‘blended solution’ without having to make any significant changes in the practice of higher education, such as enabling off-campus

<sup>241</sup> Interviews with various EU officials and others.

<sup>242</sup> Claudio Dondi, Interview, 12 May 2004.

students to complete degree programmes. Viviane Reding, Commissioner for Education and Culture, addressing a conference of the European Universities Association in 2003 called on the universities in the context of implementing lifelong learning to:

rethink the way in which students enter and leave their institutions and the type of courses on offer to them. They should consider providing courses at unusual hours (evening and weekends) to unusual students (workers, adults) at unusual places (the workplace), using unusual techniques (distance learning and ICT). (Reding, 2003b).

However such requirements on the traditional institutions to embrace the openness and flexibility in ODL are conspicuous by their absence in the debate on the Commission's elearning initiatives. There is no doubt that the Maastricht Treaty provided significant encouragement to ODL in the early 1990s. However, it would appear that rather than being mainstreamed in 2004, ODL has actually been submerged in EU policy discourse beneath the rhetorical weight of the Information Society, with its constant recourse to technological fixes for social and economic problems.

The next chapter will analyse the role of key actors in developing the policies outlined in this and the previous chapters.

## **ANNEX – CHRONOLOGY 1987-2004**

### **The Policy Window Opens – 1987-1991**

**1986** – 1 October 1986 - First meeting of SATURN

- 23 October 1986 - Preparatory meeting for EADTU (attended by EC representatives)

**1987** – 23 January 1987 - EADTU established

- 31 March 1987 - deadline for application for COMETT projects
- 15 June 1987 - ERASMUS established
- 21-24 June 1987 - EUROPACE established
- July 1987 Single - European Act came into force; objectives stimulated response from education and training system
- 10 July 1987 - European Parliament Resolution on open universities

**1988** – -Ceccini Report: 1992 The European Challenge

- April 1988 - Council agrees common position on exploratory phase of DELTA
- 15 April 1988 - EUROSTEP (the European Association of Users of Satellites in Training and Education Programmes) established
- 24 May 1988 - Council of Education ministers discuss Commission Communication on medium term perspectives 1989-1992; mention the appropriate use of distance learning methods
- 1 July 1988 - EADTU Conference in Lisbon on Long Term Developments in Distance Education; attended by H Jones; supported by COMETT
- 25 October - 1988 Meeting between EADTU and H Jones

**1989** – 1 March 1989 - Task Force Human Resources established

- 8 March 1989 - Meeting with EADTU and H Jones – EADTU to prepare memorandum for Council of Members on EOUN
- DELTA - proposal for European Electronic Open University ‘DEUCE – DELTA Electronic University for the Citizens of Europe’
- May - EADTU Workshop on Media and Technology held in Milton Keynes, supported by COMETT
- June - elections to European parliament; New Commission under Delors; new priority on education and training for the single market
- June - Commission Communication ‘Education and Training in the European Community – Guidelines for the Medium Term 1989-1992 – announced intention to report on ODL universities before end 1990
  - IRDAC working group on education and training set up
- July – PHARE programme set up to provide aid to Poland and Hungary
  - Strasbourg Council extends education and training programmes to Eastern Europe
- August - EADTU Memorandum on European Open University Network (EOUN) circulated September 1989
- February 1989 - EADTU Conference Babel a Domicile Paris; supported by Commission and French Ministry of Education; attended by H Jones
- 20 December 1989 - Irish presidency Note to Education Committee on potential for cooperative initiatives in distance education

**1990** – 7 March 1990 - Staff working paper on distance education drafted for Education Ministers meeting (d’Azevedo)

- 15 March 1990 - Coen de Vocht, EADTU Secretary, seconded to Task Force

- 26 April 1990 - Meeting of Education Committee
- 7 May 1990 - TEMPUS adopted
- 31 May 1990 - Council meeting discussed distance education Presidency paper; request that Commission appoint working group of national experts
- 2-5 May 1990 - Budapest Platform conference– cofinanced by CEC
- 1-2 October 1990 - first meeting of Working Group of National Experts – Brussels
- 18-19 October 1990 – DELTA and Beyond Conference, The Hague
- November – IRDAC report published
- 5-7 November 1990 - Conference ‘Higher Education and 1992: Planning for the Year 2000 University of Siena. Task Force and Italian Ministry for Education; called for distance education initiative
- 8 November 1990 - informal Council meeting in Siena – stressed distance education to become important means of Europeanisation of higher education, to be improved by communications technologies
- 5-7 November 1990 - conference on higher education in Siena
- 10 December 1990 - Memorandum from Commission: Towards a Trans-European Network, for a Community action programme (COM(90)585 final 10.12.90). – proposed ODL as one of priority projects for future Community Action programme

**1991** – 12 February 1991 - First draft of Task Force Report on Open and Distance Higher Education in the European Community; prepared for ODL experts meeting

- 27 February 1991 - Second meeting of Expert Group on ODL scheduled for in Athens; postponed due to Gulf War
- 12 April 1991 - Luxembourg Presidency ‘Non-paper on political union’ retains Art 128; Draft Title XV combines education and training, no mention of distance education
- May – Task Force commissioned reports on ODL in industry
- 24 May 1991 - Report from the Commission on Open and Distance Higher Education in the European Community (SEC91/879 Final)
- 29 May 1991 - EDEN founded in Prague
- 30 May 1991 - Second meeting of ODL experts – Brussels
- 18 June 1991– Luxembourg presidency ‘Draft Treaty on the Union’; deletes Art 128; new Chapter 3 with two separate articles on education and training; distance education mentioned in education article
- August – Task Force publishes directory of private ODL institutions in Europe
- 29 July-3 August 1991 - The Najaden Research Workshop; sponsored by NATO
- 26-27 September 1991 - Conference on European Multimedia Athens announcement by the Commission of a Community Action on ODL
- 8 November 1991 - Dutch presidency presents final version of Maastricht Treaty
- 5 November 1991 - *Memorandum on Higher Education* published
- *Memorandum on Vocational Education* – no mention of ODL
- 12 November 1991 - *Memorandum on ODL* presented at Maastricht on 25 November 1991 (COM91/388 Final); positive response from Ministers of Education
- 9-10 December - Chapter 3 of Maastricht Treaty, prepared by Dutch Presidency, adopted.

### **Closing the Policy Window: Embedding ODL policies 1992-1993**

**1992** – 7 February 1992 - Treaty of Maastricht signed

- 20 February 1992 - Hywel Jones addressed European Parliament Committee on Culture, Youth, Education and the Media on the main elements of Article 126

- 30-31 March 1992 - Portuguese Presidency conference on ODL in Coimbra.
- 5 May 1992 - Dept of Education received draft Council resolution on Distance Education; 6<sup>th</sup> May revised draft received
- 1 June 1992 - Council of Ministers meeting – announced proposals on ODL to be developed
- 1 July 1992 - Presidency discussion document prepared by UK presidency for Education Committee on ODL (SN 3355/92 EDUC)
- 9 July 1992 - Commission issued guidelines on selection of projects in field of distance training; mentions role of ODL networks
- 4 October 1992 - Birmingham declaration ‘a community close to its citizens’
- 4 November 1992 - Redraft of conclusions on criteria for actions on ODL
- 27 November 1992 - Ministers for Education agreed basis of cooperation in ODL; requested national reports on ODL
- 11-13 December 1992 - DOMUS meeting –Madrid ‘European Open and Distance Teaching University Students’ Congress

**1993** – - Hywel Jones appointed Director of DGV

- 2 February 1993 - Meeting of ODL Experts Brussels; details of ‘encouragement programme’
- 5 May 1993 - Ruberti paper on new programmes adopted by Commission
- 7-8 October 1993 - Conference in Poitiers on Open and Distance Education and Training in Europe (presentation of country reports on ODL)
- Delors paper on growth competitiveness and employment
- 1 November 1993 - Maastricht Treaty comes into force
- 13-14 December 1993 - Belgian presidency conference on flexible responses in ODL

### **Extending the policy arena 1994-1999**

**1994** – IRDAC report Quality and Relevance the Challenge to European Education – reiterates call for ODL

- March 1994 - Joint call for pilot projects in ODL (EADTU received funding for EOUN)
- June - call for proposals on Action in Field of ODL
- 2/3 December 1994 - EADTU workshop ‘University Level Distance Education in Europe (ULDEE) in Hagen
- Leonardo da Vinci launched
- Fourth Framework Launched

**1995** – January - Taskforce 1995 becomes DGXXII

- 14 March 1995 - Socrates launched
- March 1995 - Multi-Media Task Force set up by Bangemann and Cresson
- May 1995 - Commission published *Open and Distance Learning in the EU Member States: Synthesis Report*
- Austria, Sweden and Finland join EU
- White paper - *Teaching and learning: Towards the learning society: Learning in the Information Society*

**1996** – The European Year of Lifelong Learning

- 6 May 1996 - Council resolution on Educational Multimedia agreed
- Green Paper on Education, training, research: the obstacles to transnational mobility (no ref to ODL)
- October 1996 - Action plan on Learning in the Information Society agreed



- Study Group on Education and Training Report ‘Accomplishing Europe through education and training’ published.
- October 1996 - Action plan ‘Learning in the Information Society adopted

**1997** – 16 July 1997 - *Agenda 2000* published

- 22 September 1997 - Council conclusions on education ICT and teacher training
- October 1997 - Treaty of Amsterdam signed
- November - Luxembourg Council on employability – a new pillar...
- November - Commission Communication ‘Towards a Europe of Knowledge’
- Report of High Level Group on an information society
- eLearning term becomes current in the US

**1998** – 27 May 1998 – Commission proposals for new generation Socrates and Leonardo – ODL almost dropped...

- Sorbonne declaration on cooperation in Higher Education
- Fifth framework launched 1998-2002
- Memorandum of Understanding on Multimedia (precursor to Prometheus)
- 19 June 1999 – Bologna declaration
- European ODL Liaison Committee established
- DGXXII becomes DG Education and Culture
- 31 December 1998 - end of Leonardo I; Leonardo da Vinci II launched.
- December - ‘The rolling agenda introduced’
- December - Commission Communication e-Europe – An information Society for all COM(1999)687

### **Mainstreaming ODL 2000-2004**

**2000** – 24 January 2000 - Socrates II launched

- 27 January 2000 - Report from the Commission to the Council and European Parliament: Designing Tomorrow’s Education: Promoting Innovation with new technologies COM(2000)23 Final
- 23-24 March 2000 - Lisbon Council Meeting - Presidency Conclusions ‘Europe the most competitive economy
- 24 May 2000 Commission - Communication eLearning: Designing tomorrow’s Education COM(2000) 318 Final Brussels ‘elearning’ used for the first time by Commission
- 14 June 2000 - Commission proposal Action Plan eEurope 2002 – an Information Society for all COM(2000) 330 Final – called for elearning as educational component of the action plan
- 23 June 2000vConclusions of the Presidency: Education and Training for Living and working in the knowledge society
- 30 October 2000 - Commission Memorandum on Lifelong Learning
- 22 November 2000 the French Presidency hosted a conference in Paris on ‘e-Education’
- December 2000 – Nice Treaty adopted

**2001** - 31 January 2001 - Report from the Commission: The Concrete Future Objectives of Education Systems (COM(2001) 59 Final

- 14 February 2001 - 5680/01 EDUC 18 Report from the Education Council to the European Council ‘The concrete future objectives of education and training systems’ Detailed work programme on the follow-up of the objectives of education and training systems in Europe adopted by Council in Barcelona
- 26 February 2001 - Nice Treaty signed

- 28 February 2002 - 'eLearning – designing tomorrow's education, an interim report Brussels SEC(2001) 236
  - 28 March 2001 - Designing Tomorrow's Education: The eLearning Action plan (COM(2001)172 Final
  - March - European Council Stockholm Adopted the Commission Report 'Concrete Future Objectives of... And report from Education Council on 'the concrete future objectives of education and training systems'
  - 10-11 May 2001 - The European elearning Summit
  - 13 July 2001 - Council Resolution on eLearning (2001/C 204/02)
  - 21 November 2001 - Commission Communication Making a European area of lifelong learning a reality COM(2001)678 Final
- 2002** – April 2002 – ELearning Industry Group (ELIG) established
- 27 June 2002 - Council Resolution on lifelong learning
  - Sixth framework launched 2002-2006
  - Commission proposal Action Plan eEurope 2005 – an information society for all COM(2002)263 Final – included elearning as a measure
  - Commission Communication on European Benchmarks in education and training: follow up to the Lisbon European Council COM(2002)629 Final – report on achievement of benchmarks set out in Lisbon
  - Commission proposal on eLearning Programme 2004-2006 (COM(2002)751 Final
  - November - Commission embarked on public consultation exercise concerning the next generation of programmes post-2006
  - 19 December 2002 Council resolution no 2003/C 13/02 on the promotion of enhanced European cooperation in vocational education and training
- 2003** - 10 January 2003 - 'Investing efficiently in education and training: an imperative for Europe' COM(2002) 779 final
- 28 January 2003 - Council Resolution on the Implementation of the eEurope 2005 Action Plan 5197/03
  - Council adopted eLearning Programme 2004-2006 48/2003
  - May 2003 - European Council (Education) adopts five European benchmarks
  - 11 November 2003 - Communication from the Commission: 'Education & Training 2010': The success of the Lisbon strategy hinges on urgent reforms' COM(2003)685 Final
  - 5 December 2003 - The European Parliament adopted the eLearning Programme
  - 19 December Final - 'Proposal for a decision of the European Parliament and of the Council adopting a multi-annual programme (2004-2006) for the effective integration of Information and Communications Technologies (ICT) in education and training systems in Europe (eLearning Programme) 2003COM(2003)751 Brussels
- 2004** – 9 March 2004 - Communication from the Commission: The new generation of community education and training programmes after 2006 COM(2004)156 Final Brussels – elearning and ODL not mentioned.

## Chapter 7: Key Actors in EU ODL Policy-Making

### 7.1 INTRODUCTION

The previous chapters have outlined the history of the development of ODL policy in the EU from the Treaty of Rome in 1957, to early 2004. This account adopted a thematic approach, using Kingdon's policy streams as a framework of analysis (Kingdon, 1995). This framework described how distance education existed in the policy stream for some time before a policy window opened, allowing distance education to be linked as a solution to a range of political, social and economic problems affecting the EU in the late 1980s and early 1990s. While it is necessary to establish the sequence of events leading to adoption of a policy (the 'when' and the 'why') often the more interesting questions relate to the human aspects: the 'who' question: who were the individuals and groups responsible for developing, promoting and moving these policies forward? This chapter will now attempt to answer the questions posed in Chapter 2:

Who are the actors involved in the ODL policy development process and to what extent do the concepts of policy networks, epistemic communities, advocacy coalitions and policy entrepreneurs contribute to the analysis of this process?

Kingdon's framework has been widely used as an explanatory device in relation to the agenda-setting stage in policy development. However, it has not proved as helpful in explaining the role of actors in bringing policy development about. Kingdon ascribes the successful adoption of ideas on to the policy agenda to policy entrepreneurs, individuals committed to promoting a particular idea (Kingdon, 1995). However, he does not go on to analyse the role of other actors, including legislators, bureaucrats, communities of experts, epistemic communities, policy networks, and advocacy coalitions in translating agenda issues into 'workable EU legislative proposals' (Richardson, 1996b: 4).

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).

This chapter will focus on the role of policy actors in developing and implementing ODL policy between 1987 and 2004. As the chapter will demonstrate, the policy field is complex with a wide range of actors, interacting on different levels. This chapter argues that the ODL policy network in Europe comprises four levels of actors: distance teaching institutions (including teachers and learners) in the Member States act at a local or regional level; national actors including the governments and ministries of education in the Member States operate at both national level and at EU level through the European Council and the Education Committee; at the European level a plethora of networks, committees, as well as the European Parliament and the European Commission interact in various ways. According to Articles 149 and 150 of the Treaty, the Community and the Member States are required to cooperate with 'competent international organisations' in the field of education and vocational training. Among the international organisations that have influenced ODL policy through international reports and investigations, are the Council of Europe, OECD, UNESCO, the World Bank and the Commonwealth of Learning. It is proposed to confine this chapter to actors at EU level

and below. Section 7.2 will discuss the contribution of EU and national actors including the Commission, the European Parliament, and the European Council. Section 7.3 will then outline the role of networks as actors, including expert groups, ODL networks, higher education networks, industry networks and lobby groups, showing the way in which different networks gain or lose influence in the policy process over time. This section will also discuss the role of local actors in the Member States in influencing Member State agendas. Section 7.4 will discuss the contribution of individuals, who may be active at a number of different levels, but who may also be classified as policy entrepreneurs. The chapter will finish with a discussion of the utility of explanatory frameworks derived from political science in explaining the role of actors in the European ODL arena.

## **7.2 THE EU ACTORS**

The Council of Ministers<sup>243</sup> is the principal decision making body in the EU having both executive powers, which are normally delegated to the European Commission, and legislative powers which are shared with the European Parliament (Bainbridge, 2002: 103). It comprises the heads of governments and government ministers 'authorised to commit the government of that Members State' (Bainbridge, 2002: 104). However, policy-making in the EU has been characterised as a fragmented process involving a wide range of actors (Laffan, 1998). Laffan describes the system as

animated by a politics of pragmatism, the expert and the committee. The system rests on the Member States but works on the basis of embedding the national in the European. The growing intensity of the Union's policy process and the mobilization of national and regional actors in the Brussels space takes national actors out of their member state containers and provides them with new strategic opportunities but also a more complex and diffuse political environment. The nested games within each state/society nexus are augmented by transnational connected games (Laffan, 1998: 242).

It can often be difficult to establish where the real power lies, as this can vary from one policy area to another. It is clear that power with regard to education lies firmly within the Member States under the subsidiarity principle as set out in Article 3b of the Maastricht Treaty. However, the Commission and the European Parliament have also played an influential role in pushing policies forward and ensuring that certain policies remain on the agenda. This section will review the contribution of the three main EU level actors in the development of ODL policy in Europe: the Commission including the Commissioners and Directorates, the European Parliament and its committees, and the Member States meeting together in the Council of Ministers, as well as their national representatives on the Economic and Social Committee and the Committee of the Regions.

### **7.2.1 THE COMMISSION**

The European Commission comprises the politically appointed Commissioners and the permanent civil service located in the Directorates which carry out functions with respect to the EU largely similar to those carried out by the Ministries in the Member States. The Commission is responsible for drawing up proposals for legislation, directives, programmes and policies, in the form of official communications. However its proposals are then subjected to intense scrutiny by a number of bodies including European Parliamentary Committees, the Education Committee, the Economic and Social Committee (ECOSOC) and the Committee of the Regions (COR). The amended proposal finally reaches the Council of Ministers for decision. Sue Waddington, a UK MEP points out that 'Many proposals are the subject of

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<sup>243</sup> It should be noted that the Council of Ministers and the European Council are separate entities. The European Council is the name given to regular meetings (or summits) attended by heads of state or governments (Bainbridge, 2002: 205).

behind the scene negotiations involving Member States, Commissioners, MEPs and others, including lobbyists' (Waddington, 2002: 164). Chapter 5 outlined a number of examples where these behind the scenes consultations succeeded in making sometimes significant changes in proposals. The contribution of the Commissioners and Directorates to ODL policy will be discussed below.

### 7.2.1.1 EU Commissioners

The Commissioner is a political appointee, nominated by Member States. He or she plays a crucial role in establishing the direction of policy and in providing leadership. According to Corbett (2003c) the entrepreneurial Research and Industry Commissioner, Altiero Spinelli, established a 'rudimentary bureaucracy for EC education'. He supported the establishment of the working groups which led to the Janne Report and also participated in the first meeting of Ministers of Education in 1971 (Beukel, 2001). As discussed in the previous chapters, education was first allocated to DGXII (Science Research and Development) in 1973; in 1981, it moved to DGV which amalgamated employment, education and training policies. In 1989, education and training were moved to a separate Task Force on Human Resources, Education, Training and Youth. In 1995, education and training moved to DGXXII, which was renamed DG Education and Culture in 1999. While a number of Commissioners have made their mark on the development of educational policy in general, rather fewer have done so in ODL policy. In all, eight Commissioners have had direct responsibility for education and training in their portfolio. Ralph Dahrendorf was appointed in 1973 to DGXII and according to McCann (2001: 639)

his role in the shaping of strategy cannot be underestimated. The mechanisms which he developed predated similar techniques which were to be employed by Jacques Delors in his reconfiguration of economic policy in the 1980s.

He proved a dynamic and entrepreneurial figure, and was responsible for the key appointment of Hywel Jones who was to initiate so many innovations in education policy over the next twenty years. When education moved to DGV in 1981, Ivor Richard was Commissioner, however, he appears to have had little impact on education. Peter Sutherland took over as Commissioner for Education for one year in 1985 and oversaw intra-Commission negotiations on financial resources and the legislative framework, while Hywel Jones worked on developing the pilot programmes (Corbett, 2003c). Major developments in extending the Commission's competence in education occurred during the office of the next Commissioner Marin, including the introduction of ERASMUS.

However it was not until the Task Force Human Resources, Education Training and Youth was established as a separate entity in 1989, with Ms Vasso Papandreou as the Commissioner, that policy-making in ODL started to take off. Papandreou oversaw education policy in the crucial period during which the ODL *Memorandum* was prepared and the Maastricht Treaty was signed. She attended a number of ODL conferences expressing support for distance education<sup>244</sup> and met with ODL networks and produced supportive articles for the EADTU and SATURN newsletters.<sup>245</sup> However one interviewee who met Commissioner Papandreou on several occasions found her support to be somewhat 'luke warm'.<sup>246</sup> Some interviewees considered that the drive to support ODL at the time emanated more from the staff of the Task Force than from the Commissioner.

<sup>244</sup> SATURNOVA 1991 Report of European Multi Media Conference and Exhibition, Athens 26-27 September 1991; 4-91 EADTU *News* 13 April 1993 p5.

<sup>245</sup> SATURNOVA, 3-91 Summer 1991; EADTU *News* 11 September 1992.

<sup>246</sup> Chris van Seventer Interview 1 April 2004.



Professor Antonio Ruberti replaced Papandreou as Commissioner with responsibility for the Task Force in 1993; he was particularly active in supporting ODL during his relatively short term of office. Ruberti was an engineering professor and former Minister for Coordination of Scientific and Technological Research and Universities in Italy (1987-1992). According to a number of interviewees, Ruberti was more accessible and more interested in ODL than Papandreou. He attended conferences (e.g. Ruberti, 1993a) and met the ODL networks on a number of occasions and expressed support for their plans.<sup>247</sup> The Commission paper proposing the new programmes which included the ODL action in the Socrates programme was unofficially designated the 'Ruberti paper' in view of the Commissioner's substantial involvement in drawing up the proposals (CEC, 1993a). While he was no longer Commissioner in 1997 when he addressed the EDEN conference on EU policies in ODL, it is interesting to note that Ruberti showed a broad awareness of the issues revolving around technology and education; he called for research which is not driven by technology, but which allows space for creativity, from which new paradigms and new models can emerge to better the understanding of learning and teaching process in a technologically new and sophisticated environment. He pointed to ethical dilemmas posed by the new technologies and concluded that 'the risk of evolution being propelled by the wave of technological innovation must be avoided' (Ruberti, 1997: 11).

Mme Edith Cresson took over the education portfolio when the Task Force was transferred to DGXXII in 1995 and ushered in a dynamic new set of policies revolving around the lifelong learning agenda. According to Field (1998: 64), Cresson

brought to the position of Commissioner a modernising instinct and a degree of energy and vision that made her a natural ally of the European integrationists in the Commission. An innovator rather than an incrementalist, she had little patience with the idea that the sovereignty of Member States should invariably be allowed to hinder Europe's collective development as a global power – a development in which education and training had a vital role to play.

Cresson was responsible for establishing the Study Group on Education and Training<sup>248</sup> which published a report on 'Accomplishing Europe through Education and Training' in December 1996 (CEC, 1996d). Cresson showed little interest in ODL while privileging the position of technology and multimedia. She was responsible with Commissioner Martin Bangemann for setting up the Educational Multimedia Taskforce within the Commission, to draw up proposals to stimulate the use and development of educational multimedia in Europe (Belisle, et al., 2001). Cresson launched the Socrates programme in Dublin in October 1995. Her lack of interest in ODL may be inferred from her speech which failed to mention the ODL action in the Socrates programme, although technology is mentioned in the context of the Information Society (Cresson, 1995). Cresson's administration collapsed amid allegations of fraud in respect of the Leonardo da Vinci programme, leading to the resignation of the entire Commission in 1999.

Following the reorganisation of the Commission, Mrs Viviane Reding took over the portfolio for DGXXII (renamed DG Education and Culture) in 1999 and made elearning the focus of her term of office. Speaking at a conference in 2000 Reding described her role as

The most important role that I have to play as a European Commissioner is to be a catalyst in order to be able to set up a network between all the talents existing in Europe. A talent is important, is useful only if it can be shared with others. Our Europe is a

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<sup>247</sup> e.g. EADTU News 13 April 1993 p4.

<sup>248</sup> The group comprised 25 leading educational experts, including Professor J Coolahan, NUI Maynooth, and was chaired by Professor JJ Reiffers.



Europe of sharing, of common learning, and to this end, the new technologies are very valuable, they represent a very valuable tool (French Ministry of Research, 2000: 156).

Reding adopted a high profile in support of the elearning agenda which had emerged as an important pillar of the Lisbon process. She addressed various conferences on the elearning action (e.g. Reding, 2001; 2003a; 2003b), and the Commission documents and elearning homepage<sup>249</sup> were highly personalised with her photographs, and forewords reiterating her commitment to elearning (e.g. CEC, 2003b). As discussed in Chapter 6, ODL is no longer part of the Commission vocabulary, and certainly the term is rarely used in the Commissioner's speeches. Despite her commitment to elearning, Commission Reding was generally regarded as weak in terms of political clout within the College of Commissioners.<sup>250</sup>

As this outline of the Commissioners with responsibility for education has demonstrated, enthusiasm for various policies can wax and wane depending on the interests of the Commissioner and the amount of political clout they exert. Nevertheless, officials in the Directorate can also exert an influence on their Commissioner's interests, through their persistence in promoting solutions to problems and, indeed, their greater longevity in the system. In this regard, a number of Commission officials interviewed speculated on the identity of the new Commissioner to be appointed following the European elections in June 2004, and what impact he or she would have on the Commission's policy over the next five years. The next section will summarise the role of the Directorate in promoting the ODL agenda.

### **7.2.1.2 The Directorates General**

The Commission may be compared with the organisation of national government in the Member States: the Directorates (DGs) constitute the permanent civil service. Politically appointed Commissioners may be allocated responsibility for one or more DGs. The number of DGs has increased over time as new policy areas emerge; there were twenty three separate DGs in 2004. Prior to 1999, the DGs were identified by roman numerals, however after 1999, each Directorate was given a title designed to reflect its main policy focus.

As discussed above, education has moved in and out of various DGs since 1973. Responsibility for education was initially allocated to DGXII Science and Research. In 1981, it was moved to DGV Social Affairs, linking with vocational training and youth. The Task Force on Human Resources, Education, Training and Youth, was set up in 1989, and became DGXXII in 1995; it was renamed DG Education and Culture in 1999. In line with its increasing significance as a policy area, the Commission's education services staff increased from around 30 to 300 between the mid 1980s and the mid 1990s (Nihoul, 1999: 173). In addition to the DGs with direct responsibility for education and training, other Directorates have had responsibilities in the area of ODL in the form of media, technology, employment policies, and structural reform. The main institutions, the Task Force/DGXXII focused on educational aspects while DGXIII (now DG Information Society – INFSO) focused on research and technology. Because of the substantially more generous funding and targeted programmes, the ODL networks were more involved with DGXIII programmes in the 1980s; one network participant commented that the Task Force appeared to be less interested at the time in ODL and more interested in the flagship programme, ERASMUS.<sup>251</sup>

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<sup>249</sup> [http://europa.eu.int/comm/education/programmes/elearning/index\\_en.html](http://europa.eu.int/comm/education/programmes/elearning/index_en.html)

<sup>250</sup> Joergen Bang, Interview 19 May 2004.

<sup>251</sup> Michael Foley Interview 27 April 2004.

The Directorates exhibit a diverse range of styles of policy-making and organisational cultures 'It is not rare to find inside the DGs themselves, individual Directorates or even Units which are relatively independent administrative fiefdoms (Nihoul, 1999: 61).<sup>252</sup> 'The Directorates often coexist rather than interact. This has meant that a directorate such as social affairs, holding a middle position in the directorate hierarchy has had to look for ways to bolster its authority' (Wickham, 1981: 59). DGXIII was seen as completely separate from the Taskforce, with little cooperation between the two. As one former Commission official commented 'We could have learned a lot but there was competition with DGXIII; they had meetings promoting their own shop'.<sup>253</sup> It was acknowledged that DGXIII had many good educational experts in the late 1980s and early 1990s, while surprisingly, the Task Force was lacking in pedagogical expertise. The rivalry between the two DGs appears to have pushed the Task Force into taking action on distance learning when DGXIII attempted to move beyond technology into what the Task Force regarded as its territory, curriculum content and pedagogy.<sup>254</sup>

Ricardo Charters d'Azevedo – the Head of Division - Education and Training for Technological Change in the Task Force played an active role in developing and consolidating the Task Force's policy on ODL. He was responsible for drafting the Staff Working paper on distance education (CEC, 1990b). He recognised the need to recruit additional expertise for the Commission to prepare a Commission response to political calls for an initiative on distance education. Following the appointment of Coen de Vocht, (former Secretary of EADTU and an academic from the Dutch Open University) the Task Force embarked on a concentrated round of consultations and research in drawing up the ODL *Memorandum* and proposals for action in this area. Charters d'Azevedo was strongly committed to promoting ODL and addressed a series of conferences between 1991 and 1992 (1991a; 1991b; 1992), presenting more than the normal relatively bland descriptions of the Commission's programmes. In a series of lengthy and closely argued papers and presentations he put the case for a European action on distance education aimed at two broad principles: meeting user needs and improving the quality of distance education (Charters d'Azevedo, 1991a; 1991b; 1992; 1993). His message was that 'the users will take over the system if it will not respond' (Charters d'Azevedo, 1993: 24). The essential quality of distance education as a system aimed at extending access is encapsulated in his statement to the Vienna conference:

We have to ensure not only does the Community move from an elite towards a mass education system, but that the ethos that has been developed within the existing organisations in which distance education is the main focus of activity, survives and permeates the education system as a whole (Charters d'Azevedo, 1991a: 30).<sup>255</sup>

Following the departure from the Task Force of d'Azevedo, who was replaced by Joachim Fronia as Head of Unit, and of Ruberti, who was replaced by Cresson, the newly constituted DGXXII embarked on a review of its activities, considering whether all activities should be placed under the lifelong learning policy framework (Nihoul, 1999). Nihoul reports that there were two perspectives on how the Commission should proceed, with one side seeing the Commission as an innovator and think tank, promoting new ideas and approaches; while the other proposed the continuation of existing approaches, with the result that 'inside the education services of the Commission there has been a heated and personality driven debate between the proponents of these two legacies of past DGXXII activities' (Nihoul, 1999: 194).

<sup>252</sup> Nihoul spent six months in DGXXII working in Action A, and implementation of Socrates.

<sup>253</sup> Coen de Vocht Interview 29 September 2003.

<sup>254</sup> R Charters d'Azevedo personal communication 4 September 2003

<sup>255</sup> This article was taken from the text of a keynote speech given by Charters d'Azevedo to the AECS conference in Vienna 8-11 May 1991.

With regard to ODL policy, it appears that DGXXII confined its activities to implementing the ODL action of the Socrates programme, which was already in train, while expanding the remit of ODL to embrace a more technological focus, through the Multimedia Task Force initiative. The unit responsible for ODL continued the practice of seconding in experts to assist in implementing its programmes. In the author's experience, and confirmed by interviewees, senior officials became complacent about, and effectively lost interest in the 'encouraging ODL' agenda. Certainly the dynamic commitment of Ruberti and d'Azevedo was not evident in the public presentations of the Commission officials who attended conferences and workshops during the period. The author attended two ODL coordination meetings per year between 1995 and 1999 in her role as National Coordinator for the SOCRATES ODL agency in Ireland, and observed the diminishing interest in the Commission in distance education. Concerns with multimedia and the adoption of ICTs in schools and campus-based institutions replaced the earlier interest in access and flexibility for adults seeking access to education. Nevertheless, a number of Commission officials continued to fight to maintain an ODL initiative, particularly during 1998 when there were moves to drop the separate ODL action in the new generation of programmes starting in 2000.<sup>256</sup> The Head of Unit, Joachim Fronia actively supported the establishment of the ODL Liaison Committee which brought together the major ODL networks in Europe. Some officials stressed that technology should not be the determining factor:

cooperation aims equally at an improvement in access to education and to training for all those who are presently excluded. It must be concerned with those who do not have access to educational facilities or to traditional training because they live in rural areas or are far away from training centres. It is equally about those who are excluded because they belong to disadvantaged groups because of their social or working situation, or because of disability (Hermant-de-Callatay, 1999: 258).

Following the reorganisation of the Commission in 1999, the Multimedia Unit was established in DGEAC, under Maruja Gutierrez, to oversee ODL policy, among others, with a staff of 22.<sup>257</sup> Preparations for the Lisbon process generated a new round of policy proposals in this unit. A plethora of documents and proposals, drafted by officials including Corinne Hermant, Brian Holmes and Andre Richier, have emerged, designed to bring the Lisbon process to life through the elearning initiative. However, despite the four years of elearning being at the forefront, complacency appears to have returned; again senior Commission officials express the view that elearning is now 'mainstreamed' and requires no further specific action.<sup>258</sup> Commission officials won the battle to retain the ODL action for Socrates II with the support of MEPs, however, the battle seems to have been lost in the generation of programmes proposed for 2006-2010, as confirmed by the Head of Unit.<sup>259</sup> With a few exceptions, Commission officials appear to accept that ODL and even elearning are now regarded as relatively marginal activities in DGEAC; there is a concern that efforts have been made to avoid 'polluting' the ERASMUS programme with elearning and ODL and only strenuous lobbying by EADTU and others have served to maintain the possibility of introducing a virtual element into the ERASMUS programme.<sup>260</sup>

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<sup>256</sup> Commission Official DGEAC Interview 23 September 2003; Maruja Gutierrez Interview 17 May 2004.

<sup>257</sup> Commission Official DGEAC Interview 17 May 2004.

<sup>258</sup> Commission Official DGEAC Interview 17 May 2004; Commission Official DGEAC Interview 23 September 2004; Commission Official DGEAC Interview 1 April 2004.

<sup>259</sup> Commission Official DGEAC interview 17 May 2004.

<sup>260</sup> Joergen Bang EADTU, Piet Henderickx, EADTU, Commission Official DGEAC interviews.

As mentioned before, DGEAC is not the only area of the Commission which has had a role in distance education. DGINFSO (the former DGXIII) has supported ODL initiatives through its Research and Development framework programmes since the 1980s. The key difference between DGEAC and DGINFSO lies in basic versus applied research; another difference is a substantial disparity in funding for programmes supported by the two DGs. DGINFSO funds projects with multi-million Euro budgets, while the projects funded under the Minerva project range from €100,000-700,000 (MacKeogh, 2004). According to a Commission official in DGEAC, DGINFSO, through the 6<sup>th</sup> Framework Programme looks to the future; DGEAC through the Minerva programme looks at applications for today and is more practical.<sup>261</sup> However, both Directorates have tended to take a technocratic approach to education. It is interesting to note that while distance education providers are eligible for funding through a number of programmes (e.g. Minerva, the Multimedia initiative, the eLearning programme, or the Framework programmes) their involvement in these programmes has diminished over the years (see Chapter 8).

## 7.2.2 THE EUROPEAN PARLIAMENT

Members of the European Parliament are important actors in European policy, especially following the first direct elections to the European Parliament which took place in 1979. In the same year, under the 'Val Duchess process' Commission staff were authorised to contact MEPs in the course of their work on proposals and policies, subject to permission of their DG (Corbett, 1998: 83). The Parliament's powers were increased by the Single European Act in 1987 and the level of lobbying has increased (Lehmann, 2003: 33). According to Corbett

MEPs are in constant dialogue with the Commission, both at the level of the Commissioners themselves and at the level of their civil servants. Access is free and open and, indeed, privileged. This means that MEPs are well placed to act as go-betweens or contacts, as the 'man or woman in Brussels' to whom national political parties, local government and other interests can turn. (Corbett, 1998: 84).

MEPs who act as rapporteurs for the Parliamentary Committee on Culture, Youth, Education and the Media can be particularly influential in educational policy development, as the Commission is required to refer policy proposals and communications in the education and training area to this Committee for review and recommendation to Parliament. The Rapporteurs' reports make interesting reading as opinions are expressed forcibly and MEPs are in a position to take a much tougher stance against the Council of Ministers, than the Commission, when it comes to fighting for increased budgets to fund action programmes.<sup>262</sup> Nihoul points to the decision to increase the funding for Socrates 1 as an example of the cooperative relationship between the Commission and the European Parliament's Committee on Culture, Youth, Education and the Media (Nihoul, 1999: 172). Similarly, the Committee was responsible for raising the Socrates II budget from the initially proposed €1.550m to the final total of €1,850m.<sup>263</sup>

The Parliament has had few occasions specifically to comment on ODL policy, especially since the Commission itself has ceased to put forward any new proposals in this area. Nevertheless, the Parliament has made some crucial interventions. As Chapter 4 indicated, the

<sup>261</sup> Commission Official DGEAC Interview 1 April 2004.

<sup>262</sup> Interestingly, there are no Irish MEPs on the current Committee (1999-2004). According to Proinsias de Rossa MEP, this is because of a perception that education is not a particularly powerful policy area in the overall context of the EU. Interview 3 July 2004.

<sup>263</sup> European Parliament Fact Sheets 4.16.0 Education, vocational training and youth policy [http://www.europarl.eu.int/factsheet/4\\_16\\_0\\_en.htm](http://www.europarl.eu.int/factsheet/4_16_0_en.htm); Doris Pack MEP website <http://www.dorispack.de/>

notion of ODL was first aired by two proposals from MEPs leading to the Parliamentary Resolution on Open Universities (Ewing Report, 1987).<sup>264</sup> According to the former Secretary General of EADTU the Parliament showed no further interest in ODL until it was called on to consider the Commission's proposals for action in distance learning.<sup>265</sup> As discussed in Chapter 5, the Rapporteur, Doris Pack MEP initially prepared a negative report; however following a series of meetings and lobbying from the networks and national interests, a more positive report emerged leading to the Council Resolution on open and distance learning.<sup>266</sup>

Pack<sup>267</sup> went on to become a staunch supporter of the Socrates programme, acting as rapporteur for a number of Parliamentary reports on the programme between 1994 and 1999. Her trenchant support for increased budgets under Socrates have been of indirect benefit to the ODL action programme, and she was regarded as particularly helpful in supporting the Commission's proposals for a separate named action for ODL under Socrates Phase II, at a time when the UK and Austria were opposed to the concept.<sup>268</sup> More recently there has been considerable interaction between the Commission and the Parliamentary Committee concerning proposals for the elearning initiative. These proposals have been met with a combination of exasperation at the short time allowed to respond, and the fact that some initiatives have already been launched before they have had a chance to consider and influence them. Concerns are repeatedly expressed at the meagre resources, the digital divide, the need to retain the human focus in education, and the recent concentration of Commission interest in school level education to the exclusion of adult and lifelong learning. Perhaps Pack's contribution to the European Parliamentary debate on new technologies and tomorrow's education aptly expresses the fraught relationship between the Parliament, the Commission and the Council, echoing Field's description of the Commission's tendency to use the 'discourse of crisis' to produce modest proposals (Field, 1998):

the Commission and the Council really seem to be both maximalists and minimalist. Maximalists in the strategies and political ambitions they develop on paper. On the other hand, however, the European Union and above all the Council, is a very great minimalist when it comes to actually giving these great projects financial resources. Then it is always the Commission or Parliament or whoever that come in for criticism, but never the people who with great pomp and ceremony announce to the great councils how important training and education are. If they would provide the money for it the next day, we would all, especially our citizens, be very grateful.<sup>269</sup>

Although the 1990s was characterised by constant disputes between the Commission and Council with both reluctant to concede power to the European Parliament there is evidence that the Parliament's power was indeed growing as Field (1998: 22) notes that lobbyists increasingly target Parliament in pushing their interests. It is clear, however, that lobbyists from the education sector are failing to target MEPs, a point raised by Sue Waddington MEP who mentions that no educational bodies sought to influence the negotiations surrounding the

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<sup>264</sup> The European Parliament agreed a resolution on this Report on 10 July 1987 OJ 0133. Contributors to the debate were listed as: Ewing; Papakyriazis; Munch; Beasley Peter; Pordea; Cianacaglini; Marin.

<sup>265</sup> November 1992 Rapporteur Doris Pack. Draft report of the Committee on Culture, Youth, Education and the Media on distance learning and its future in the European Community PE 200.59L/8/rev

<sup>266</sup> 1992 Conclusions of the Council and the Ministers of Education Meeting within the Council of 1 June 1992 on the development of open and distance learning in the community OJ C 151 16 June 1992 p3

<sup>267</sup> Doris Pack website <http://www.dorispack.de/> Parliamentary Debates. Monday 13 December 1999 Socrates (Second phase) I

<sup>268</sup> Interview with Commission Official, DGEAC 23 September 2003.

<sup>269</sup> Doris Pack MEP Debates of the European Parliament New technologies in tomorrow's education. Sitting of Monday 14 May 2001



legislation for Socrates II and Leonardo II for 2000-2006 (Waddington, 2002: 164). Given that the European Parliament appears to react to Commission proposals and rarely generates its own initiatives on education, it is perhaps not surprising that there has been little or no account taken of ODL policy in the European parliament since the mid 1990s.

### 7.2.3 THE MEMBER STATES AS ACTORS

The Member States exert a particularly strong influence in EU educational policy-making because of the principle of subsidiarity. All proposals and policies are subject to scrutiny at national level to ensure that subsidiarity is not infringed. National interests are represented in a number of venues in the EU, when Member States come together to negotiate common ground. The principal venue is of course the European Council comprising the Heads of Government or States. Egeberg points out that the Commission operates on a functional basis, while the Council structure highlights regional aspects and affiliations (Egeberg, 1999: 458). Egeberg defines three areas in which national actors are involved in EU policy-making: expert committees under the Commission (preparatory committees); working groups under the Council of Ministers; and the comitology<sup>270</sup> committees (Egeberg, 1999: 461). The role of expert committees will be dealt with later in the chapter; the next section will describe the contribution of national actors to ODL policy: the Education Committee and the Council Presidency; and the comitology committees, the Economic and Social Committee and the Committee of the Regions.

#### 7.2.3.1 The Council Presidency

Each Member State takes over the Presidency of the Council for a period of six months, on a rotational basis. While the Member State controlling the Presidency may find it difficult to initiate totally new policies, nevertheless, it can shape the agenda through exclusion of some items while highlighting others (Tallberg, 2003). The role of the European Council has increasingly become the venue for 'history making decisions' (Wallace, 2000a: 20); indeed each Presidency attempts to ensure that some significant policy development is associated with its term of office. Between 1990 and 1993, each Presidency in turn contributed to ODL policy development. The Irish Presidency in May 1990 launched an initiative in distance education. The Italian presidency supported the Siena Conference in November 1990 which prepared the ground for the Commission's *Memorandum on Higher Education* and which highlighted the potential of ODL. The Luxembourg Presidency in early 1991 and the Dutch Presidency later that year were responsible for drafting the new Treaty on European Union. A commitment to encouraging the development of distance education was inserted in the draft Treaty in June 1991, and was retained throughout the subsequent negotiations. The Portuguese Presidency took up the challenge of developing an action programme on distance education, by holding a conference in Coimbra in March 1991, which produced a draft resolution on action in ODL. Finally, the UK Presidency continued the debate on ODL by producing a draft paper on the market for ODL. No significant actions emerged from the Danish Presidency in early 1993, however, the Belgian Presidency held a high level conference on distance learning in Brussels in December 1993 which was designed to extend the debate to representatives from conventional higher education institutions.<sup>271</sup>

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<sup>270</sup> The comitology committees are responsible for overseeing the implementation of EU laws, regulations and resolutions. Their status may be advisory, where the Commission is required only to take account of their opinion; managerial where the Commission is obliged to incorporate the Committee's opinion in its programmes; or regulatory where the Committee has the power to refer disputed policies to the Council (Bainbridge, 2002: 58).

<sup>271</sup> It is interesting to note that the Irish Presidency prepared a paper on Lifelong Learning in 1996, which mentioned ODL; however the Council Conclusions of 20 December 1996 on a Strategy for



It may be of significance to note that the Presidencies which were instrumental in supporting ODL development were also states with significant ODL institutions with strong political links at national level and which were members of EADTU: the Irish National Distance Education Centre; the Consorzio Univerzita a Distanza in Italy; the Dutch Open Universiteit; the Portuguese Universidad Aberta; the UK Open University; and the Belgian distance education consortium STOHO.

After 1993 ODL virtually disappeared from the Presidency agenda, although the European Distance Education Network developed a pattern of locating their annual conferences in the country which held the Council Presidency. ODL, in the guise of elearning returned to the agenda during the Lisbon presidency in March 2000 and the eLearning Initiative was agreed in December 2003 under the Italian presidency. Nevertheless, neither elearning nor ODL featured on the Irish Presidency agenda in 2004, although a conference on ICTs in schools took place in Dublin in May 2004. The Irish official<sup>272</sup> responsible for coordinating the Irish Presidency's education events agreed that he had not heard ODL mentioned for many years and the possibility of including ODL as a theme for the Presidency had not surfaced at any stage. Interestingly, the Dutch Presidency agreed to support a conference organised by EADTU and the Dutch Open University in October 2004 on the theme of 'Mass Individualisation of Higher Education' which may serve to remind policy-makers of the potential, and indeed, the continued existence of ODL on the policy agenda.

#### **7.2.3.2 The Education Committee**

The Education Committee is an important element in the policy-making process. The 1976 Resolution (CEC, 1976) formally established the Education Committee as a permanent institution, initially to supervise the implementation of the 1976 Action Programme (Nihoul, 1999: 78). The membership comprises representatives of the Commission as well as delegates from the Member States nominated by the Ministries of Education. The Committee discusses the technical and ideational aspects of proposals, however, budgetary and legal aspects are the province of Coreper I<sup>273</sup> which can decide on the status of proposals put to the Council of Ministers. National representatives on the Education Committee vet proposals and consult with local policy makers and experts on specific issues before finalising the agenda for the Council meetings. This process occurred in relation to the Presidency papers relating to ODL prepared by the Irish, Portuguese and UK presidencies as discussed in Chapter 5. The Committee's deliberations are confidential and minutes are not in the public domain; anything published from the Committee is released under the name of the Ministers. The Director General of DGEAC Niklaus Van der Pas and the two Directors David Coyne DGEAC A (general area) and Michel Richonnier (B – vocational education, LLL, ICT) attend the meetings.<sup>274</sup>

#### **7.2.3.3 The Comitology Committees: ECOSOC And COR**

The European Economic and Social Committee (ECOSOC) was set up under the Treaty of Rome to involve economic and social interests groups in the establishment of the common market and to brief the European Commission and the Council of Ministers on EU issues. Its

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Lifelong Learning highlighted the role of new technologies and did not refer to ODL (OJ C& 10 January 1997 p6-12).

<sup>272</sup> Sean Harkin Dept of Education and Science, Interview 12 May 2004.

<sup>273</sup> Committee of Permanent Representatives, whose main task is the preparation of meetings of the Council of Ministers (Bainbridge, 2002: 96)

<sup>274</sup> Sean Harkin Dept of Education and Science, Interview 12 May 2004

role was reinforced in the subsequent Treaties. Comprising 222 members nominated by national governments the Committee is regarded as having a key role in the EU decision-making process.<sup>275</sup> The Employment, Social Affairs and Citizenship (SOC) section of ECOSOC is responsible for issuing opinions on Commission proposals relating to education and training (opinions may be issued on request from the Commission, or on its own initiative). Examples of its role include its endorsement on 21 September 1987 of the need for the urgent implementation of the pilot phase of the DELTA programme<sup>276</sup>; on 23 November 1988 it issued a favourable opinion on the Commission's proposals for COMETT II.<sup>277</sup>

The Committee of the Regions (COR) is a newer body set up by the Treaty of Maastricht to ensure representation of regional interests in EU decision making (Bainbridge, 2002: 60). It also comprises 222 members drawn from regional and local bodies, with nine members from Ireland. The Maastricht Treaty requires that COR be consulted on range of issues, including education, and the Committee can provide opinions on specific proposals or it may offer opinions on its own initiative. The Education and Culture Committee (EDUC) of COR is responsible for preparing opinions on proposals relating to education, training and culture.<sup>278</sup> Both bodies have advisory status which means that the Commission is obliged to consult them for their opinions, but may not necessarily pay any attention to what they have to say. These Committees have complained that the short deadlines in some cases for submitting their opinions indicates a lack of commitment from the Commission to the consultation process.<sup>279</sup>

Both ECOSOC and COR have produced some in-depth responses particularly to the Commission's elearning initiative; while welcoming the initiatives, these committees express similar concerns to those expressed by the European Parliament, including: inadequate funding, the digital divide, the need to go beyond technology as an end in itself; using technology to improve education rather than replacing traditional forms of teacher-based education; and using technology as a mean of extending distance education to rural and remote areas. The Commission communications and Council resolutions make routine reference to the opinions expressed by these Committees, as they are required to do under Article 149 of the Treaty, however, it is not clear that these opinions influence in any way the actions and initiatives adopted by the Commission in the long run.

#### 7.2.4 SUMMARY

This section has indicated that policy-making in the EU is fragmented across a wide range of decision-making and consultative bodies, operating at an EU scale and at a national level. The main actors over the years have been the Commission since it is the permanent feature; with strong Commissioners and Heads of Units it is possible to push a policy area along, or indeed, as appears to have happened, to cease imperceptibly to push. 'The Commission is indeed very rarely overruled by a committee: in 99 per cent of the cases it gets its own way, regardless of the decision procedure applied' (Egeberg, 1999: 461). National actors, acting within the

<sup>275</sup> see <http://www.esc.eu.int> Ireland has 9 representatives, 3 each nominated by employers, employees, and various social interests.

<sup>276</sup> OJ C 347 22 December 1987.

<sup>277</sup> CES 1222/88-SOC 169.

<sup>278</sup> see <http://www.cor.eu.int> .The Chair of EDUC in 2003/4 was Annette McNamara, a local representative from Cork.

<sup>279</sup> E.g. Rapporteur Mr van Dijk Opinion of the Economic and Social Committee on the Proposal for a European Parliament and Council Decision establishing 1996 as the European Year of Lifelong Learning (COM(94) 264 Final) 23 November 1994 Brussels.

Community, can also influence the agenda but are not so effective in ensuring that the decisions made are implemented in the way originally envisaged.

Nevertheless, the balance of power appears to have shifted, especially in the wake of the difficulties associated with the Cresson era. A number of interviewees commented that the Commission is no longer driving the policy process.<sup>280</sup> It has become more formalised than in the past when there was a feeling that it was much more open to stakeholders in ODL. Commission officials appear to be buried in documentation, and there is a sense of frustration with the level of bureaucracy particularly as regards the management of implementation programmes.<sup>281</sup> They appear to listen more to national stakeholders and are required to consult with COR and ECOSOC, as well as the parliamentary committees perhaps in a more meaningful fashion than heretofore. From the point of view of the Commission officials, the involvement of national actors in the policy-making process appears to have the effect of

slowing down policy-making while also producing surprising results. Issues may appear or disappear at some stage in the process without anyone quite knowing why, how or where.<sup>282</sup> Angelis and Grollios argue that the new form of decision making characterised by the 'rolling agenda' with priority themes discussed over a series of Council meetings have effectively downgraded the role of the Commission in policy formation, while upgrading the relationship between the Member States and the Council (Angelis and Grollios, 2003: 84).

In the next section, we turn to the role of networks in influencing ODL policy.

### 7.3 NETWORKS AS ACTORS

A number of commentators have pointed out that the Commission prefers to work with networks as a means of developing or perhaps, simulating a certain degree of bottom up consensus (Ertl, 2003; Field, 1998; Radaelli, 1999; Sultana, 1995). According to Field (1998: 178), the Commission uses external networks to achieve its policy aims when it foresees difficulties in pursuing its own agenda. He concludes that the Commission is aware of the

value of creating sympathetic networks, not of abstract citizens but of those whom they regard as potential opinion-formers who then give impetus for the extension of the Union's current policies and activities... the creation of task forces and working groups on specific problem areas, and the appointment of expert advisers to select successful proposals, are presented by the Commission as a matter of public accountability and effectiveness. Yet they also serve the equally important function of providing a bridge between the EU and its citizens (Field, 1998: 188).

Networks can be a catalyst for change and innovation, but also can be centres of resistance, for opposing change and defending interests (SCIENTER, 1998). The European Association of Distance Teaching Universities (EADTU) played the latter role in its successful opposition to the concept of the European Open University, (CEC, 1991b). Nevertheless, the history of ODL policy in the EU bears out the contention that networks are more likely to support, rather than openly oppose the Commission's policy-making and implementation activities. This section will firstly discuss the contribution of expert groups to the policy process. An attempt will then be made to explain the role of a wide range of networks which contribute in to varying degrees in ODL policy. This will be followed by a brief examination of the role of industry groups and lobby groups.

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<sup>280</sup> Jim Devine SATURN & Oscail, Interview 19 March 2004.

<sup>281</sup> Claudio Dondi SCIENTER Interview 12 May 2004.

<sup>282</sup> Interviews with various commission officials.

### 7.3.1 EXPERT GROUPS

Spichtinger points out that one of the Commission's favourite methods of legitimising its autonomy is through the endorsement of its strategies by independent expert committees (Spichtinger, 2003). Egeberg carried out research on the role of national actors on EU expert committees and pointed out ambiguities in their role and representations:

National officials are sometimes selected directly by the Commission, implying that they are supposed to attend in their capacity as experts. However, on other occasions, the Commission asks national administrations to appoint their representatives on expert committees, thus suggesting that they should express the views of their governments. Also during an expert committee meeting, officials may find that their roles are expected to shift quickly: when the Commission official makes a tour de table at the end of a meeting in order to anticipate Council reactions, a typical expert may suddenly find himself/herself turned into a government representative (Egeberg, 1999: 462)

The only EU expert committee on ODL per se was the Committee of National Experts on Distance Education and Training convened in 1990 following the Irish Presidency initiative on distance education.<sup>283</sup> Egeberg's description of the conflicting roles of participants as experts, and/or national representatives is an accurate depiction of the author's experience as a member of this Expert Group.

The Expert Group met three times in 1990/91 to discuss the preparation of the ODL *Memorandum*, and on a further occasion in 1993 to discuss the preparation of national reports on ODL and the shape of the new implementation programmes to be launched in 1995. It is of course interesting to speculate on the nature of the expertise participants bring to these meetings, when they are nominated by the Member States, rather than appointed directly by the Commission. The ODL Experts Group comprised 25 representatives nominated by the relevant Ministries in the Member States. Of the 25 nominees, only 6 were from distance education institutions, of whom three were from the university sector (NDEC Ireland, the Belgian University Consortium STOHO and the Portuguese Universidade Aberta); the other three were from the further education and continuing education sector (the German Staatliche Zentralstelle für Fernunterricht; the Spanish Instituto del Instituto Nacional de Bachillerato a Distancia and the Dutch Distance Education Centre for Adults). Twelve members were from the ministries; two were from universities (one of whom was President of the satellite network EUROSTEP) and four were from training organisations.<sup>284</sup> According to one interviewee, the Dutch ministry made a deliberate decision not to nominate a representative from the Dutch Open Universiteit, to avoid biasing the discussion in the direction of the OU model.<sup>285</sup> On the other hand, the Irish government nominated representatives from Oscail – the National Distance Education Centre (which was a member of the ODL networks, EADTU, SATURN, EUROSTEP and EUROPACE) and the Audio Visual Centre in University College Dublin whose Director was also president of EUROSTEP.

From the author's notes of the meetings, although some experts from the Ministries (especially the Danish Ministry) made insightful contributions to the discussion, relatively few of the participants could be described as fully aware of the issues involved in developing and delivering distance education programmes. Instead the group endorsed the Commission's focus on the new technologies, and the ODL market especially in training for SMEs, despite

<sup>283</sup> Minutes of the 1409<sup>th</sup> meeting of the Council and the Ministers for Education meeting within the Council held in Brussels on Thursday 31 May 1990 6849/90

<sup>284</sup> Author's records of meeting of National Experts 2 February 1993

<sup>285</sup> Coen de Vocht interview 29 September 2003.

warnings from the distance education specialists present on the need to proceed with caution in view of the costs involved, restricted accessibility to the technology, and lack of proven pedagogical advantages. The different national and organisational allegiances of the experts also influenced their contributions, with some representatives resisting the idea of a separate programme for ODL, while others called for more EU involvement in the ODL market.

The Commission established a group of experts in 1995 to monitor the Socrates programme, with two experts nominated from each Member State. With a programme covering such a broad spectrum of education, it would be virtually impossible to find two individuals with the requisite range of expertise among them. Ireland, in common with the rest of the Member States nominated two officials from the Department of Education and Science. From time to time, the author as national coordinator of the ODL action in Ireland was invited to provide structured feedback and advice to the Department on Commission proposals on funding and priorities, thus ensuring that the Experts were fully briefed on the issues involved.

More recently the ICT Working Group is one of nine established in 2001 to identify the 'concrete objectives for future education and training systems and implementing the related work programme'. Again direct expertise in developing and delivering programmes using ICTs appears to be limited. Of the 48 members of the working group, 38 were representatives from the ministries, 14 were from networks and organisations (of which EDEN was the only distance education network represented - others included the OECD, MENON, and UNICE). The working group was supported by six representatives of the Commission, including Corinne Hermant, Rapporteur and Claire Belisle, Consultant and co-rapporteur. Nine meetings were held between September 2001 and June 2003. The main focus of the Working Group report was on the educational use of ICT at school level. The report ends with the not surprising contention that education, not technology should be in the 'driving seat' and that 'Following the technological hype and consecutive disillusion, growing attention is to be given to evaluation, research and critical thinking' (CEC, 2004b: 33). Despite this, the limited impact of Expert Groups may be deduced from the description of the ICT action proposed in the new generation of programmes 2006-2010. The technology hype/hope remains the driver, and ICT action will focus on

cross-cutting activities aimed at the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning. It will be implemented through multilateral projects and networks, and through other action such as observation, benchmarking and quality analysis (CEC, 2004a: 18).

The question of the precise area of expertise of the experts used by the Commission to inform its policies on ODL and more recently elearning may serve to explain the virtual disappearance of ODL from the policy agenda. We will now turn to the role of the ODL networks in influencing EU ODL policy.

### **7.3.2 NETWORKS**

The establishment of European networks in ODL, bringing together private and public sector institutions, has long been an objective in EU policy. European ODL has been characterised by a proliferation of networks with varying degrees of commitment to ODL; some networks were ephemeral, lasting a relatively short time; while others have persisted. It is not proposed to provide detailed descriptions of the various networks to be discussed in this section, however Table 7.1 provides summary details of main networks involved. Of the four networks mentioned in the *Memorandum on Open Distance Learning*, the European Association of Distance Teaching Universities (EADTU), established in 1987 has proved most resilient, and has changed and adapted over its seventeen years of existence. The



EADTU played a key role in the early development of the EU's ODL policy although its influence had greatly reduced by 2004, as it competes with a wide range of other networks for the Commission's interest.

The other networks mentioned in the *Memorandum* (CEC, 1991b) had ceased operations by 1995. EUROPACE (a group of universities and high technology companies developing satellite based training) had ceased operations in 1993 (Van den Branden and Van der Perre, 1997: 361). It was later relaunched as EUROPACE 2000, 'a trans-European network of traditional universities and their partners in industry and society for telematics-supported education and training' (Van den Branden and Van der Perre, 1997: 361). The other now defunct networks were EUROSTEP (an association of users of satellites in education and training); Channel *e* (a television service delivering educational programmes) and SATURN (a network of open and distance teaching universities and enterprises).

However other networks emerged following the *Memorandum*, including EDEN (the European Distance Education (now eLearning) Network); DOMUS (Distance Open Methods University Students); ODL Liaison Committee; Prometheus (Promoting Multimedia Access to Education and Training in European Society); and European Schoolnet, an electronic network linking schools in 23 countries (Eurydice, 2001: 17); and ELIG (the eLearning Industry Group).

These networks, while appealing to somewhat different constituencies, also overlap to a certain degree, with regard to membership and aims. Indeed, the networks have formed 'supra networks' for the purpose of a number of EU funded projects, such as Humanities (concerning the role of ICTs in humanities subjects); Euroliterature (concerning the use of Web resources in literature); DUNE (aimed at identifying barriers and obstacles in ODL); and Sustain (a dissemination project, analysing and documenting the outcomes of the Socrates ODL funded projects).

In the course of a series of interviews with Commission officials and members of ODL networks, a number of questions on the role of networks were posed. Was there genuine consultation and feedback between the EU and the networks? To what extent was the Commission influenced by lobbying and representations from the ODL networks; did the networks present a common platform in dealing with the Commission, or was there competition and conflict? Which was the most effective lobby in EU thinking and why did some networks cease to exist while other persisted? The following is a distillation of views from interviews, as well as evidence from network publications and archives.

### **7.3.2.1 Consultation And Feedback**

Initially, it was suggested that the Commission adopted a top-down approach in 1987 by promoting the concept of a European Open University following the European Parliament Resolution.<sup>286</sup> But this proposal was dropped in the face of opposition from the main players in the field. In response, the Commission embarked on extensive consultations with EADTU as a network as well as with the distance teaching universities (DTUs). At this stage there was a real dialogue in place between the Commission and the DTUs. In the late 1980s and early 1990s both EADTU and SATURN had good working contacts with the Commission, as well as with a number of MEPs who had expertise in the field. Both networks organised meetings

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<sup>286</sup> 1987 Resolution on open universities in the European Community OJ 0133 Session document A2-0069/87.



and seminars on behalf of the Commission. It was believed that the Commission listened carefully to their proposals and suggestions which were often adopted in the Commission programmes and initiatives. A reading of the EADTU minutes and newsletters as well as the SATURN newsletter reveals frequent formal meetings and informal contacts between network members and Commission Officials. The appointment of the Secretary of EADTU on secondment to the Commission in 1990 provided a valuable conduit for EADTU into the Commission, although the official concerned was careful to ensure that all interested parties were given a hearing and involved in the consultative process.<sup>287</sup>

DOMUS (Distance Open Methods University Students) a forum for distance education students was established in Madrid in December 1992 with EADTU and Commission support. Ricardo Charters d'Azevedo looked forward to the contribution DOMUS would make to the development of ODL in the Community.<sup>288</sup> Its establishment occurred at an opportune time in the history of ODL policy-making. It was invited to present its views at the meeting on ODL organised by the European Parliaments Committee on Culture, Youth, Education and the Media in 1993 and lobbied the Commission to ensure that ODL students were included in the ERASMUS programme.<sup>289</sup>

As mentioned above, EADTU members were also influential at national level, with considerable access to policy-makers in the Member States. These contacts facilitated in no small way the adoption of ODL on the EU agenda between 1990 and 1993.

### **7.3.2.2 A Common Platform?**

Prosser and Durando commented on the proliferation of networks attracted into the COMETT programme, most of which were unclear about their medium or long-term objectives, the internal tensions which surfaced and the mismatch between resources and ambitions (Prosser and Durando, 1992: 339). Besides EADTU and SATURN, a wide range of networks were involved in some way with ODL. The Commission tried to persuade the networks on a number of occasions to present a common platform in their consultations with the Commission. One such effort, brokered by Hywel Jones to provide funding for a joint initiative linking EADTU, SATURN and EUROSTEP in a distance teaching consortium using Structural Funds, ended in failure, due to lack of agreement between the parties on who would lead the consortium.<sup>290</sup> Each network, despite overlapping memberships and aims and objectives, nevertheless sought to retain its own identity. The view of most interviewees was that EADTU was the least interested in cooperating with other networks as it felt its leading role as the only network of national level bodies involved in distance teaching would be diminished. An analysis of EADTU minutes particularly between 1987 and 1992 reveals a continuing concern with the role of other networks and the appropriate relationship strategy to adopt. EADTU members were particularly concerned to delineate the precise relationship with SATURN. There appeared to be a lack of clarity, as on the one hand, SATURN was regarded as a subset of EADTU member institutions with the addition of industrial partners and was thus complementary to EADTU, while on the other hand SATURN was regarded as competing with EADTU for influence and funding from the Commission. SATURN made regular reports to the EADTU executive on its activities and the leadership positions in the two organisations was often taken by the same individuals. For example, Friedhelm

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<sup>287</sup> Coen de Vocht Interview 29 September 2003.

<sup>288</sup> Ricardo Charters d'Azevedo EADTU *News* 14 August 1993 p8.

<sup>289</sup> John Needham, Director DOMUS EADTU *News* 14 August 1993 p41.

<sup>290</sup> EADTU Executive Committee of 14 May 1993 reported on the 'very difficult meeting with SATURN and EUROSTEP' which took place 26 March 1993; Chris van Seventer interview 1 April 2004.

Nickolmann of FernU and Armando Trindade of the Portuguese Universidad Aberta both held official positions in both SATURN and EADTU at different times.

The EADTU as well as other networks strongly opposed the establishment of EDEN in 1991, even though one of its members, the UKOU was a driving force in its establishment, providing seed money, staff and accommodation for its first three years of existence. The author attended the inaugural meeting of EDEN in Prague on 29 May 1991 at which representatives from other networks opposed the establishment of a new network in view of the plethora of existing networks.

Despite the rivalries between networks, at times it was essential to cooperate in order to obtain project funding (for example the DELTA funded European MBA project). One interviewee commented that perhaps the Commission benefited from competition between the networks in obtaining the best expertise and consultancy.<sup>291</sup>

It is interesting to note the number of attempts which the Commission has made to create a common platform of networks. One example is the action of a number of DGs which came together in 1998 to set up a new network of key players in ODL, multimedia and ICTs. The Prometeus (Promoting Multimedia access to Education and Training in European Society) initiative was launched in 1999. A memorandum of understanding on Multi Media Access to Education and Training in Europe was signed by over 500 organisations with secretarial support from DG Information Society, with the objective of enabling players in education and training to identify common interests in developing and exploiting ICTs and multimedia. The organisation operates through a series of Special Interest Groups (SIGs). The Commission does not provide direct funding to the network, but funds could be sought through the Information Society Technologies (IST) programme within the Fifth Framework programme for research (Memorandum of Understanding, 1999).

Another example of a Commission supported network initiative is European Schoolnet, based on an initiative of the Swedish Minister for Education in December 1996 (Eurydice, 2001: 17). The network started in September 1998, with the support of 18 Ministers for Education. It now links schools by Internet in 23 countries in Europe. The network is funded by the Member States, and not the Commission. The European dimension is intended to offer added value, and potential for exchange of products, materials, guidelines, and best practice.

The Commission supported the establishment of the ODL Liaison Committee as a coordination body in 1998. This initiative brought together nine networks 'to create a forum for the exchange of views in the field of ODL' and to 'give recommendations to the European Commission and Member States and to assist in defining and implementing action plans and programmes in order to enhance the integration of ICT in learning'.<sup>292</sup> The networks included: the COIMBRA Group; EUROPACE 2000; EADL (European Association of Distance Learning); EFFECOT (European Federation for the Children of Occupational Travellers – which ceased in 2003); EFODL (European Federation for Open and Distance Learning); EUCEN (European Universities Continuing Education Network); and ICDE (International Council for Distance Education – Europe). DGXXII welcomed the establishment of the Liaison Committee in the following terms:

the coordinated activities of these professional networks would greatly assist the Commission in promoting open and flexible learning schemes, help facilitate lifelong

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<sup>291</sup> Friedhelm Nickolmann Email Interview 19 May 2004.

<sup>292</sup> ODL Liaison Committee <http://www.odl-liaison.org>

learning and support the development of a 'Europe of knowledge'. Through the Liaison Committee the networks will have a common interface with European institutions, notably the Commission, helping them to advise on the implementation of Community action in the field of ODL and the use of new technologies in education.<sup>293</sup>

The ODL Liaison Committee organised a conference on ODL during the Portuguese presidency in 2000, and produced a discussion paper on implementation programmes (ODL Liaison Committee, 2002). However despite the Commission's optimism about this venture, the Liaison Committee is seen as a weak organisation, and has become a 'loose discussion group only' and wields little influence, to the extent that Commission officials rarely attend meetings of the group any more. There are suggestions that this situation suits the larger networks which prefer to have their own direct links with the Commission.

### **7.3.2.3 The Most Effective Lobbyists?**

Between 1987 and 1993, the distance teaching universities both individually and as members of EADTU, formed a very effective lobby, in the Commission and in the European Parliament as well as at national level. The support of EADTU is seen as instrumental in the successful establishment of the Portuguese Universidade Aberta; a resolution from an EADTU conference in Lisbon in 1988 persuaded the Portuguese Minister for Higher Education to give the go ahead to the project. Industry groups (discussed in the next section) were also effective at lobbying the Commission, in particular, the European Round Table of Industrialists (ERT) which lobbied the Commission to improve the supply of training and education to meet the needs of the Single Market and to tackle competitiveness. One interviewee pointed out that the traditional universities sometimes acted as a negative counterweight to ODL development, by expressing concerns about ODL as an inferior and low quality form of education.

A number of interviewees expressed the opinion that after 1995, the Commission no longer listened to EADTU although organisational difficulties at that time served to distract energies away from the Commission. More recently, there is renewed optimism in EADTU circles that once again its role is recognised by the Commission; the Commission invited the Rectors and Directors of EADTU member institutions to an intensive two-day meeting in March 2004 to discuss aspects of the elearning programme, marking, it is hoped, a new era in relations with the Commission. EADTU's role in promoting the virtual mobility aspect of the Bologna process through its 'eBologna' initiative has also commended itself to Commission officials.<sup>294</sup> Despite the optimism, the overall impression gained through a number of interviews is that the ODL networks are of marginal influence on the Commission at this time, especially in view of the wide range of other Committees and interest groups to which they must attend under the open method of coordination.

The traditional universities, in the form of CRE (now EUA – European University Association) and the Coimbra Group adopted a proactive stance towards ODL in the mid 1990s, hosting seminars and research projects. Their interest in ODL arose from concerns that in an era of increasing competition in higher education, traditional universities were falling behind, and there was a need to harness the potential of the ICTs in traditional education (Coimbra Group, 1998; CRE, 1996; CRE, 1998). However the general consensus is that these groups have retreated to their core business in higher education and are concentrating on implementing the Bologna process instead.

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<sup>293</sup> DGXXII Press release 2 February 1999 <http://www.odl-liaison.org/pages/press.htm>. Accessed 27 May 2003.

<sup>294</sup> Interview Commission Official DGEAC 11 May 2004.

Between 2000 and 2004, the industrial lobby appeared to hold the ear of the Commission, as will be discussed below in the context of the ELIG, the ELearning Industry Group.

#### 7.3.2.4 Persistence of Networks

In 1991, a DELTA funded project managed by SATURN<sup>295</sup> identified twelve pan-European groups with interests in open learning or multimedia supported education; the total rose to 35 if national and global networks were included. This project identified the characteristics of a successful network as:

- *Focus*: the network focuses on a distinct sphere of interest and activity
- *Transparency*: the network operates on the basis of clearly stated objectives
- *Neutrality*: the network is independent from one method, company or funding programme
- *Balance*: the network has a representative membership (north/south; large/small)
- *Commitment*: the decision-makers in the member associations are committed to membership of the network
- *Dedication*: the network attracts the human and financial resources required to support its activities
- *Stability*: the network has persisted over a significant time period

There was concern about competing networks: for example three satellite networks had been established, but no computer based training networks; there was also concern at the danger of diluting expertise and experience through too large a number of networks. One former COMETT official described how the promise of Community funding had generated a proliferation of networks, many of them populated with 'sleeping partners' and riven with internal tensions and insufficient resources to match their ambitions (Prosser and Durando, 1992: 339). By 1991, there had already been an amount of change and rationalisation taking place. The influence of the networks waned, particularly after 1993, when the flurry of activity in developing ODL policy and actions had subsided, and following changes of personnel in the Commission. The ODL *Memorandum* (CEC, 1991b) had referred to the four main ODL networks, EADTU, SATURN, EUROSTEP, EUROPACE, yet by 1995, only EADTU had survived.

SATURN had been supported financially by the City of Amsterdam and the Dutch government and flourished for its first four years, based on EU project income, secondments from member institutions, and membership subscriptions. However, it encountered financial and managerial difficulties in 1993; its reliance on project income, which required matching funding, was a fatal flaw in its operation. The economic downturn in the early 1990s resulted in the withdrawal of a number of industrial members and generally the membership lost interest in what SATURN could offer. The network was wound up in 1994. A Commission official commented that perhaps it was ahead of its time in view of the linkage between higher education and industry and that it might have had better prospects in the current climate.

EUROPACE failed in 1993; it had adopted a model of satellite delivered training which had been successful in the United States but which was unsuited to Europe, because of the diversity of languages and high communications charges. The industrial members withdrew, however the remaining members agreed to restructure the organisation with reduced aims and objectives (Van den Branden and Van der Perre, 1997). EuroPACE 2000 is now a consortium

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<sup>295</sup> EADTU *News* 7 June 1991 pp5-6.

of universities interested in satellite delivery. It is funded by the Catholic University of Leuven and survives largely on funding from EU projects.

Problems emerged in EUROSTEP when subsidies from the European Space Agency ceased, and the network was required to be self-funding (Mavridis, 1993). Membership subscriptions were insufficient to cover the high cost of transmission (Mavridis, 1993). The network 'fizzled out'<sup>296</sup> around 1994, due to lack of funding combined with a lack of demand for the services offered.

Despite the support at political level for a platform for DOMUS, the students' network, funding for the network was always a problem, and it went out of existence around 1996.

EADTU also went through difficult times in 1994, caused primarily by its decision to invest in the development of the European Open University Network as a private foundation, without first ensuring that adequate financing was available, the long term viability of the plan, and most importantly, the commitment of the membership. The network faced bankruptcy in the mid-1990s, but was rescued financially by the Dutch Open Universiteit and by its Executive which developed a restructuring plan which enabled it to survive the crisis. The persistence of EADTU is attributed to the financial support and commitment of its member institutions, as well as its focus on distance education as its core business. Its policy of limiting membership to institutions with a national remit and coverage in distance education is also regarded as a strength; the members of EADTU are 'serious players' in European distance education representing over a million ODL students. This policy promoted the establishment of national networks (e.g. FIED in France and more recently networks in the accession countries), while also presenting a national profile in consultations with the Commission. EADTU succeeded in creating a community of distance education institutions in Europe. However, EADTU has also been criticised for its elitist nature as a 'rectors' club'; it has found it difficult to extend its influence into the faculty levels of its member institutions, while EDEN has tended to take on this role by attracting academics to its conferences and accepting individual academics as members.

Despite the rather inauspicious reception at its inaugural meeting, EDEN has carved out a niche for itself as a forum for a broad spectrum of individual academics and institutions involved in ODL throughout Europe. Initially, EDEN was closely identified with developments in Central and Eastern Europe, but has now broadened its membership to all European countries. There is also considerable overlap with EADTU, most of whose members are also members of EDEN. Its light management structure is funded from the profits made from organising annual conferences and it has avoided the trap of over reliance on project funding which was the downfall of other networks, by participating in, but refusing to lead EU funded projects. One Commission official described EDEN as a sound organisation, presenting good conferences and making a profit.<sup>297</sup>

Generally speaking the criteria for a successful network identified by SATURN can be usefully applied to explain why some networks persisted and why some went out of existence. Table 7.1 summarises the main networks which have had varying levels of influence on ODL policy and compares the characteristics of the networks against the SATURN criteria. Generally those that failed to survive did so because of lack of commitment from their membership, unclear objectives, but above all, lack of human and financial resources.

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<sup>296</sup> Interview Michael Foley, former President of EUROSTEP.

<sup>297</sup> Maruja Gutierrez DGEAC Interview 17 May 2004



**Table 7.1: European ODL Networks – Summary**

<b>NETWORK</b>	Clear focus of activity	Clear objectives	Independent sources of funding	Balanced membership	Commitment of decision makers	Resources – human financial	Stability and persistence
<b>EADL</b> est. 1985; European Association of Distance Learning (formerly Association of European Correspondence Schools); Schools, private training orgs	✓	✓	✓	✓	✓	✓	• <i>Survives</i> : clear focus on for-profit ODL in continuing education and training; income from membership fees & conference; most members are in the profit making private organisations
<b>SATURN</b> 1 October 1986; (Scientific and Technological Updating by Remote Networks) DTUs, Higher Education, Industry, Training	✓	✓	?	✓	?	?	• <i>Wound up</i> 1994; Industrial members withdrew; too much dependence on project funding; not enough commitment from members
<b>EADTU</b> 23 January 1987; European Association of Distance Teaching Universities; Distance Teaching Universities & consortia	✓	✓	✓	?	✓	?	• <i>Survives</i> : membership restricted to distance education institutions with national remit (1.3m ODL students); clear focus on ODL; executive level participation.
<b>EUROPACE</b> June 1987; European Programme for Advanced Continuing Education. Universities and ICT multinationals; based on NTU model	✓	✓	?	?	?	?	• <i>Ceased</i> 1993; Satellite delivery (NTU) model unsuitable for Europe; quality of presentation inadequate; technology too costly at the time.
<b>EUROSTEP</b> April 1988; European Association of Users of Satellites in Training and Education Programmes Broadcast/Satellite operators/HE/Industry/Schools	✓	?	?	?	?	?	• <i>'Fizzled out'</i> around 1994. Membership too disparate; insufficient funding; no source of income.
<b>EDEN</b> May 1991; European Distance Education Network; European Distance and eLearning Network since 2003 Distance Teaching institutions; individual academics	✓	✓	✓	✓	?	✓	• <i>Survives</i> : clear objectives; focus on organising ODL conferences; profitable business model; not reliant on project funding
<b>DOMUS</b> 12 December 1992; Distance Open Methods University Students Distance education Students	✓	✓	?	?	?	?	• <i>Ceased</i> c. 1995-6: Existed with support of OUUK; no further funding available through membership fees or Commission; ODL students difficult to organise.
<b>EuroPace 2000</b> 1994 Universities (KU Leuven)	✓	✓	✓	?	✓	✓	• <i>Survives</i> : Limited functions; focused on universities; some project based activity
<b>ODL Liaison Committee</b> 25 June 1998 Distance teaching networks	?	?	?	?	?	?	• <i>Survives</i> as a discussion forum: expectations of providing a common ODL platform; Not seen as a serious player in 2004
<b>Prometeus</b> November 1998; Promoting Multimedia access to Education and Training in European Society, Universities, industry. Further & continuing education	✓	?	?	?	?	?	• <i>Survives?</i> : Commission initiative to link distance education institutions and industry; has failed to become self-funding as expected. Some special interest groups remain active.
<b>European Schoolnet</b> ; est. 1998 Electronic network, linking schools in 23 countries.	✓	✓	?	✓	?	?	• <i>Survives?</i> : Established by Ministers for Education with Commission support; clear focus, but running into funding difficulties
<b>ELIG</b> : 2001 Elearning Industry Group (Microsoft, IBM etc)	✓	?	?	✓	?	?	• <i>Survives?</i> Very influential in Commission in early 2001; reducing influence; European elearning market problematic; no funding from Commission.
<b>EUA</b> European University Association (formerly CRE) Conseil des Recteurs d'Europe Universities continuing education departments	✓	✓	✓	✓	✓	✓	• <i>Survives</i> ; investigated ODL in mid 1990s; now concentrating on Bologna process; retains observer status on ODL LC.
<b>COIMBRA</b> group – est. 1985 network of 33 historic universities in small towns in Europe	✓	✓	?	?	?	?	• <i>Survives</i> : investigated blended ODL in mid 1990s; now concentrating on Bologna process; member ODL LC.
<b>SCIENTER</b> : 1987 Distance learning research, consultancy, project mgt; universities higher education	✓	✓	✓	?	✓	✓	• <i>Survives</i> : Research and consultancy organisation; principal shareholder U of Bologna; 'ubiquitous' in European ODL



### 7.3.3 INDUSTRY GROUPS

Industry groups, such as IRDAC and ERT (The European Round Table of Industrialists) have played an important role in driving the Commission's agenda especially in the context of training and lifelong learning. Field comments that

politically, of course this has been highly convenient for the European policy makers, allowing them to convene advisory networks which produced reports that were even more radical still than the Union's existing analysis, followed repeatedly by calls for a reorientation of education and training towards the promotion of continuous lifelong learning (Field, 1998: 184)

ERT was established in 1983 by 17 of the largest European companies, and is one of the most powerful industrial lobby groups in Europe.<sup>298</sup> It has direct access to Commissioners and senior members of governments in promoting its policies. The primary aim of ERT is to 'strengthen the competitiveness of the European economy on the world stage'.<sup>299</sup> The ERT issued a series of reports in the 1980s which were influential in implementing the single market and European Monetary Union. In many cases, proposals and recommendations in their reports have been incorporated into official EU documents (e.g. the White Papers on Competitiveness and Lifelong Learning). The ERT report 'Education for Europeans – Towards the Learning Society' was published in March 1995; two years later, the Commission published its White paper 'Teaching and Learning – Towards the Learning Society' – which incorporated ERT's views on the integration of education and training with the needs of the economy. ERT's report 'Investing in Knowledge: The integration of technology in European Education' was followed by the publication of the Commission's report on 'Towards a Europe of Knowledge' which also reflected ERT's views. In 2003, the ERT was campaigning against what it regards as the slow implementation of the Lisbon process, the goals of which 'can only be achieved if there is an increase in the quality of education and training and a radical improvement of the framework conditions for R&D' (Cromme, 2003). While ERT is widely held responsible for ensuring that an economic view of education is retained in the Commission's documents and proposals, in many cases its documents project a more liberal and holistic view of the role of education than those issued by the Commission.

The Industrial Research and Development Advisory Committee (IRDAC) was established by the Commission in 1984. The influential *Report on Skills Shortages* (IRDAC, 1991) was quoted at great length as a justification to take action in ODL by both the HE and ODL Memoranda. The Committee comprised industrialists and educationalists, and was chaired by Sir Robert Telford, Marconi. IRDAC also highlighted the slow progress in adopting ODL in another report in 1994 (IRDAC, 1994). IRDAC was superseded by the European Research Forum (ERF)<sup>300</sup> in 1998, although this never actually functioned.<sup>301</sup> The ERF was subsumed in the European Research Advisory Board (EURAB) which was established by decision of the Commission on 27 June 2001.<sup>302</sup> EURAB, despite having subsumed IRDAC, appears to have adopted an academic rather than industrial focus. To date it appears to have nothing to say about elearning or new methods of education. To a certain extent this may have created the vacuum which has come to be filled by the IT companies which are putting

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<sup>298</sup> See website at <http://www.ert.be/>

<sup>299</sup> [http://www.ert.be/pg/eng\\_frame.htm](http://www.ert.be/pg/eng_frame.htm) accessed 1/12/2002

<sup>300</sup> Commission Decision DEC 98/611/EC/EURATOM.

<sup>301</sup> [http://www.lex.unict.it/cde/documenti/vari/98\\_99/18Novemb\\_98.htm](http://www.lex.unict.it/cde/documenti/vari/98_99/18Novemb_98.htm)

<sup>302</sup> OJL192/21 14.07.2001.

increasing pressure on the Commission to support them in their efforts to develop an elearning market in Europe.

Gutierrez notes that the elearning initiative has attracted keen interest from industry, in particular the IT industry (Gutierrez-Diaz, 2003). The Commission co-hosted a meeting with members of the US based Learning on Demand<sup>303</sup> network in Brussels on 24 October 2001 which discussed the potential role of governments and the EU in e-Learning. The US government investment of €454 over a five-year period for elearning in the US army was mentioned as an example of the potential of governments to influence the adoption of elearning.<sup>304</sup> Maruja Gutierrez, representing the Commission at this meeting, 'did not share the view of many people in elearning that education systems need to change quickly', instead she is quoted as saying that 'education systems are too important to change them quickly'.<sup>305</sup> Nevertheless, according to the report of this meeting, many of the participants, drawn from the major IT and elearning companies were keen to put pressure on the Commission to develop the market for elearning through awareness raising, and funding projects. The possibility of funding an 'eUniversity for Europe' or an eVocational Training Institute was suggested by participants.

A group of major IT companies organised the elearning summit in May 2001, from which emerged ELIG (the Elearning Industry Group) (Gutierrez-Diaz, 2003: 29). ELIG has also lobbied the Commission to support public private partnerships in education as a means of stimulating the elearning market (CEC, 2003c). A workshop on this topic organised by ELIG and the Commission took place in November 2002 (CEC, 2003c). Nevertheless, there is evidence that ELIG's influence in the Commission is waning, with the recognition of the difficulties posed by the undeveloped, fragmented and diversified market in Europe for elearning 'products'. There is a suggestion that the group may be losing interest as the Commission does not have the same financial resources, or political clout, as the US Federal Government has to invest in large scale technology projects. The industries themselves appear unwilling to invest in higher education. In one Commission official's view the network is 'running out of steam' as the members realise they are in competition with each other. The Commission also realises that the industrial group has its own agenda, to develop a market and to increase profits, in which the European integration agenda is of little relevance. A number of interviewees commented that the emergence of ELIG signals the recurrence of the same technology hype fuelled by fears of American competition, led by ERT and IRDAC in the late 1980s.

#### **7.3.4 LOBBY GROUPS**

According to Bainbridge, Brussels is a fertile ground for lobbyists because of the relative openness of European institutions in comparison with most national bureaucracies, and the relative ease of access to decision makers and administrators (Bainbridge, 2002: 358). It is estimated that in 2000, 2,600 interest groups were involved in lobbying on a vast range of topics, with many maintaining offices in Brussels (Lehmann, 2003). Field comments that some lobby groups were created specifically to influence the EU's policies while others combine lobbying with other functions (Field, 1998: 23). He cites the ERT and the Conseil des Recteurs d'Europe (CRE) as particularly important groups in education and training

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<sup>303</sup> Learning on Demand is a sub-group of SRI Consulting-Business Intelligence; it comprises a 'global network of thought leaders and early adopters of elearning' from Europe, Asia and the US (<http://www.sric-bi.org/>).

<sup>304</sup> 'The role of government in elearning: summary of the Learning on Demand/eLearning Forum Meeting 24 October 2001 <http://www.altrc.org/displayit.asp?id=836>.

<sup>305</sup> Ibid.

(Field, 1998: 23). Most of the networks discussed above have also included lobbying the Commission as a *raison d'être*. Field finds that the Commission is 'remarkably open to direct approaches from professional bodies and specialist associations' (Field, 1998: 23). An example of this in the ODL field is SCIENTER, the Bologna based distance education research organisation. SCIENTER was established in 1988 as a non-profit private company with the University of Bologna as the major shareholder. It has carried out research on many aspects of ODL and has often been consulted by the Commission on proposals and elaboration of ideas on policies.<sup>306</sup> Its contribution to Commission thinking may be inferred from the fact that SCIENTER is regularly invited to participate in expert groups, and workshops in ODL.<sup>307</sup> SCIENTER shares an office in Brussels with another network, Menon and the Greek Lambrakis Foundation in order to be near the source of funding and power.

One of the few examples of effective lobbying by the ODL networks, is the Commission's decision to drop its proposals for the European Open University in favour of a network based on existing institutions. It was not uncommon for the EU to seek to establish European Institutions or foundations, such as the European University Institute in Florence, or CEDEFOP, which encountered opposition from interested parties at national level which feared interference from the Commission (Corbett, 2002). It has never been specified what exactly the Commission had in mind in their promotion of the European Open University, although parallel developments in the Council of Europe saw investigations of the feasibility of a similar institution (Seabright and Nickolmann, 1992). The EADTU was particularly effective in lobbying against the proposed European Open University. In August 1989, it published a Memorandum on the European Open University Network as a rebuttal to the Resolution on Open Universities (EADTU, 1989). This Memorandum was circulated to the Commission in September 1989 with a request for funding for an alternative European Open University Network. The EADTU met with Hywel Jones and Commissioner Papandreou to discuss the Memorandum and EADTU members were invited to 'use the Memorandum for lobbying at the national political level' prior to the meeting of the EC Council of Ministers in October 1989.<sup>308</sup>

The memorandum sought to offset the proposals for a separate European Open University 'For reasons of efficiency and to avoid unnecessary overhead costs, the EADTU does not believe that it is necessary to establish a separate institution called a 'European Open University' (EADTU, 1989: 6). Instead it pointed out that EADTU was an 'evolving Europe-wide network of distance teaching institutions' (p6); and was developing policies for course and credit transfer, joint production of courses, sharing and exchange of experiences in use of modern media; and developing support systems for language teaching (p6). It also offered to set up a joint working group with DGV to investigate the future development of the European Open University, based on the progress made by EADTU and which could link in with the proposed DELTA Electronic University for the Citizens of Europe (DEUCE). The proposals were anchored in the context of preparations for the single market in 1992. It concluded that EADTU had 'the potential to become a functional European Open University, as advocated by the European Parliament' (EADTU, 1989: 13). The original idea was that EOUN would be based on a network of study centres (EuroStudyCentres) providing services to members and the public. They were intended to demonstrate the potential of ODL at local and regional level and in developing the European ODL market through marketing distance learning 'products' from the offerings provided by EADTU members and other providers; providing student support in the form of tutorials, access to technology, and examination supervision; and supporting mobility through credit transfer and joint

<sup>306</sup> Claudio Dondi Interview 12 May 2004.

<sup>307</sup> Ibid.

<sup>308</sup> Letter dated 6<sup>th</sup> September 1989 from Coen de Vocht, Executive Secretary EADTU.

course production. Despite the enthusiastic endorsement of the EuroStudyCentres from the Commission (Charters d'Azevedo, 1993: 22), the network experienced problems from the beginning – as one interviewee commented it 'never had a life'. The ESCs never actually functioned as centres providing services for other EADTU member organisations. A partial explanation lies in the introduction of web-based technologies and increasing home ownership of PCs which obviated the need to travel to centres for access to technology.

A number of interviewees maintained that the decision to drop the European Open University idea remained, in hindsight the best approach. According to a current EADTU member and former Vice President of Saturn 'It avoided fruitless and costly competition and useless spending of taxpayers' money. Of course it strengthened the existing DTUs and national networks and their member institutions'.<sup>309</sup> However, negative lobbying has its drawbacks. It is easier to achieve success in lobbying to suppress an initiative than it is to lobby for a fully worked out alternative, and interviewees when pressed to consider what long term achievement has replaced the proposed European Open University were unable to identify any particular success. The EADTU's attempt to establish the European Open University Network almost resulted in its demise. It is interesting to speculate what might have been in this regard. The exact institutional form of the European Open University was never debated fully. Instead, the assumption was that the new institution would constitute competition for existing DTUs. Had an organisation similar to the European University Institute in Florence been established, ODL would have had a physical presence in the EU educational landscape, on a sound legislative and financial footing, which might perhaps have acted as an informed 'think tank' for policy-makers and allowed researchers to research new methodologies and approaches. This is of course a speculative scenario in which most of the interviewees were reluctant to engage.

## 7.4 POLICY ENTREPRENEURS

According to the literature policy entrepreneurs play a crucial role in the policy-making process by linking their particular policy solution to a problem stream (Kingdon, 1995). Policy entrepreneurs are described as individuals who are willing to invest their resources: in pushing their pet proposals or problems; in coupling solutions to problems, and coupling both problems and solutions to politics (Corbett, 2003b; Nihoul, 1999). Policy entrepreneurs must have three characteristics: the right to a hearing because of their expertise or leadership position; political connections or negotiating skills; persistence in developing and promoting their proposals over time until the appropriate opening in the 'policy window' [in Kingdon's terms] appears (Kingdon, 1995; Nihoul, 1999: 33).

Other researchers have identified Hywel Jones as the key policy entrepreneur in EU educational policy (Corbett, 2002). His influence in supporting and encouraging a wide range of activities and projects in European higher education was widely acknowledged (Corbett, 2003b; Gellert, 1993a: 7). He was the first full-time Commission Official (appointed 1973) devoted to educational matters and his role in directing education and training policy over the next twenty years was critical (Corbett, 2003c). He was transferred from the Task Force in 1993 to take over responsibility for the EUROFORM-NOW-HORIZON programmes.<sup>310</sup> He was appointed Director of DGV, Social and Employment policy in 1995 and retired from the Commission in 1998.<sup>311</sup> It is perhaps not a coincidence

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<sup>309</sup> Fred Nickolmann Email 19 May 2004.

<sup>310</sup> As reported in EADTU Executive Committee minutes 14 May 1993 (EA/MTW 21-6 MME)

<sup>311</sup> See: About us – Hywel Jones, Chairman European Policy Centre Brussels  
[http://www.senliscouncil.net/modules/about\\_us/jones](http://www.senliscouncil.net/modules/about_us/jones) accessed 15 January 2004.

that the decline in the Commission's interest in ODL, discussed in Chapter 6, coincides with Jones's departure from the educational arena. Unfortunately, attempts to secure an interview with Jones failed. However, a number of interviewees had worked with Jones and paid tribute to his support for an ODL initiative. Prior to his appointment to the Commission he had worked in Sussex University for over ten years in the international office (Corbett, 2002) and in his own words 'was involved a bit in the lead up to the British Open University' (Jones, 1991: 3). He demonstrated in a series of papers and presentations to conferences a keen understanding of the issues involved in distance education (e.g. Jones, 1989; 1991; 1992). EADTU minutes and newsletters document many meetings between Jones and EADTU representatives at which the shape of an ODL policy was discussed. Jones's leadership position in the Commission was crucial in guiding ODL through the crucial four years between 1988 and 1992 when the policy window opened.

According to a former Commission official, after 1992 Jones had a vision of integrating ODL into the traditional universities and widening the spread of institutions involved beyond EADTU and the other networks. He had concerns about EADTU's plans to launch the European Open University Network as a private foundation and was reluctant to 'put all his cards' on this venture. As mentioned above, Jones sought to persuade the networks to cooperate in a joint initiative, but failed to achieve this objective in the face of the networks' refusal to cooperate, and he moved on and away from direct involvement in ODL policy.

Other key individuals at Commission level who might meet the description of policy entrepreneurs were Ricardo Charters d'Azevedo, the Head of Unit, and the Commissioner Antonio Ruberti whose influential positions and persistence helped to embed ODL in the Commission's policy portfolio in the early 1990s. Corinne Hermant has also played an important role in ODL policy and implementation. She has been with the Commission since 1988 when she worked in the DELTA unit. Later she was responsible for ensuring that ODL and the Minerva actions were supported in Socrates. She is currently responsible for drafting the key documents on elearning, but as has been pointed out earlier, many other interests are now involved in preparing Commission proposals.

While many individuals were highly influential with the Commission and their national governments, one individual may be identified as a policy entrepreneur during the 1988-1993 period. Chris van Seventer was the Secretary General of EADTU between 1987 and 1996. He had been Acting Director of Higher Education in the Dutch Ministry of Education and Sciences, and Managing Director of the National Institute for Educational Research, before his appointment as Executive Vice-President of the Dutch Open Universiteit in 1985 (Belisle, et al., 2001: 58). He was well connected politically and institutionally and drove the EADTU with vision and commitment for nine years. His political skills ensured that EADTU members were encouraged to lobby their own Ministries, and he was personally close to the Dutch political establishment, including the Dutch Minister for Foreign Affairs during the time of the negotiations leading to the Treaty of Maastricht. His senior position as Executive President in the University and Secretary General of EADTU, his political connections, and his persistence paid off in the sense that distance education was inserted into the Treaty, and the Memoranda on Higher Education and ODL led to a series of actions at Commission level aimed at promoting the development of ODL in Europe. However, van Seventer then committed himself to establishing the European Open University Network as a private foundation, aimed at implementing a transEuropean ODL delivery network based on EuroStudyCentres throughout Europe. 1994-1995 were turbulent years in EADTU's existence. The organisation faced bankruptcy as the highly ambitious EOUN foundation lost money and office staff were let go, leading to legal action which further undermined EADTU's financial viability. Other interviewees, while paying tribute to van Seventer's



leadership and entrepreneurial skills in the earlier years, felt that he had overreached the capacity of the organisation in driving the EOUN concept. Van Seventer stepped down in October 1995, and EADTU managed to survive the crisis. As the organisation spent some years attempting to re-establish itself on a firm financial footing it is fair to say that no individual matching the description of a policy entrepreneur has emerged from EADTU, or indeed from any other ODL network in recent years.

## **7.5 DISCUSSION AND CONCLUSIONS**

To what extent can political science assist us in explaining the role of the actors discussed above? The discussion in Chapter 2 set out four explanatory frameworks which have been used in the analysis of EU policy: policy network analysis; epistemic communities and advocacy coalitions, as well as the policy entrepreneur concept to explain the role of individuals.

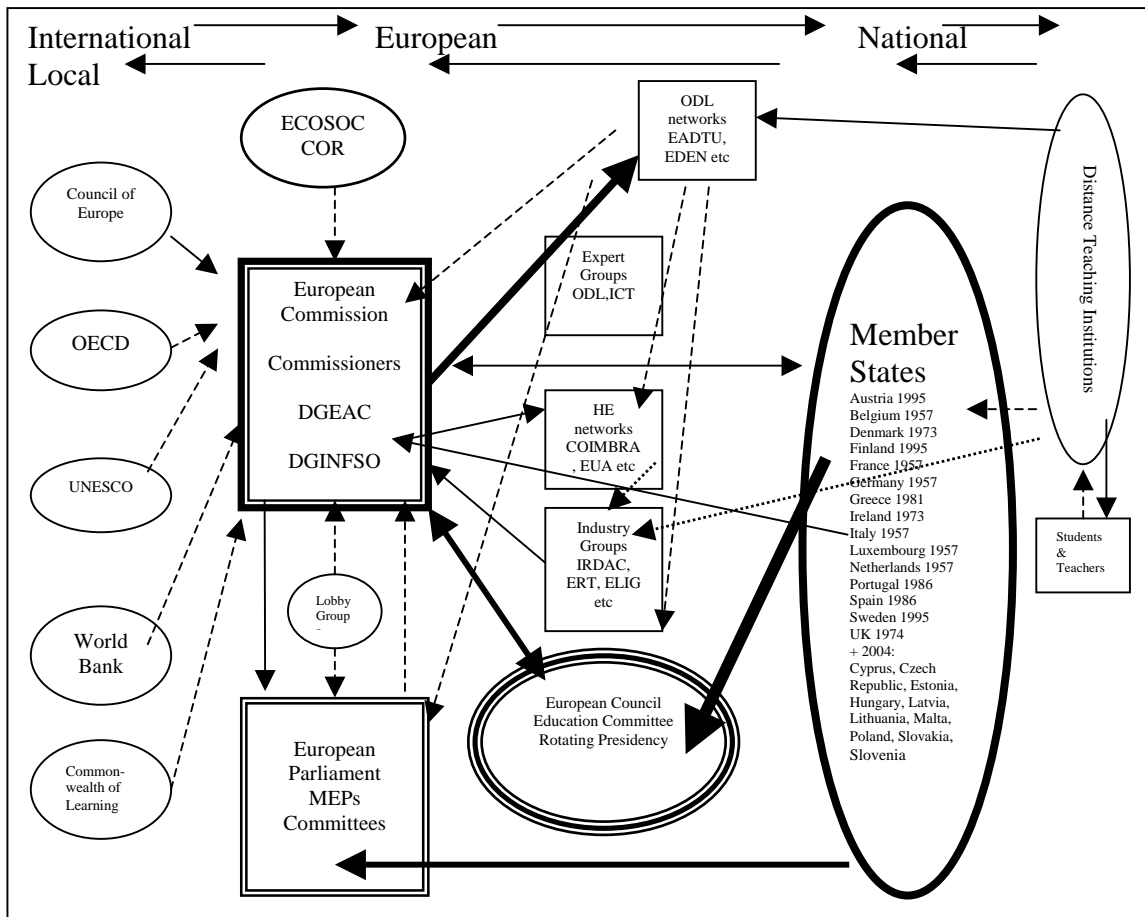
### **7.5.1 POLICY NETWORKS**

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 7.1 is an attempt to map the relationships between the different levels of organisational actors in the European ODL policy network.

This diagram maps the way in which organisations interact at four levels: international, European, national and local. 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.



**Figure 7.1: The Policy Network in European ODL**



## 7.5.2 EPISTEMIC COMMUNITIES

Epistemic communities comprise a network of professionals from a variety of disciplines and backgrounds who share *normative and principled beliefs*, which provide a value-based rationale for the social action of community members; *causal beliefs*, which are derived from their analysis of practices leading or contributing to a central set of problems in their domain and which then serve as the basis for elucidating the multiple linkages between possible policy actions and desired outcomes; *notions of validity* – that is, intersubjective, internally defined criteria for weighing and validating knowledge in the domain of their expertise; and a *common policy enterprise* – that is, a set of common practices associated with a set of problems to which their professional competence is directed, (Haas, 1992: 3).

Epistemic communities provide a resource of knowledge and expertise at both agenda-setting and formation stage. At the policy implementation stage they sit on advisory committees and act as evaluators for research proposals (in this they still act in an advisory role, they are not decision makers); they also provide the Commission with an independent cross European expert forum to enable the Commission to ‘maintain its position as an independent policy-making institution and to increase its leverage with the Council of Ministers and the European Parliament’ (Richardson, 1996b: 15).

### 7.5.3 ADVOCACY COALITIONS

The rigidity of the epistemic community concept makes it difficult to find a community which meets all of the conditions (Verdun, 1999). An alternative perspective is provided by the concept of advocacy coalitions, defined as networks organised and united around a common set of normative and causal beliefs and attempting to control a policy arena or policy subsystem to enact their beliefs and principles (Sabatier, 1988b; Zito, 2001: 585). The advocacy coalition is a broader group, which may comprise politicians, interest groups, lobbyists and journalists, whereas epistemic communities tend to be dominated by expert professionals. The advocacy coalition framework is regarded as useful in investigating the role of multiple coalitions competing with each other for dominance over the policy process (Verdun, 1999).

### 7.5.4 CONCLUSION

To a certain extent, all three perspectives are useful in examining the role and influence of the various groups and networks described above. The policy network approach is of assistance in describing the interactions and in exploring the linkages between the various networks of ODL, Higher Education and Industry actors and the Expert Groups, the Commission and the national governments. Interviews with network actors and Commission officials, as well as archival analysis has drawn out the multi-layered involvement of individuals and organisations in the process. Individuals have taken on overlapping roles, as experts on Commission working groups, members of several ODL networks, Higher Education groups, as well as national advisors. The relationships between these different elements were summarised in Figure 7.1.

It is more difficult to categorise any particular network or organisation as an epistemic community. The EADTU is the organisation most likely to qualify as an epistemic community on the basis of its expertise in distance education and the involvement of its members as experts and evaluators at many stages of the process. Nevertheless, there is little evidence from interviews and archival analysis to suggest that EADTU as a group shared common normative, principled or causal beliefs, according to Haas's definition of the terms. It is even doubtful if EADTU shares a common policy enterprise, since there are acknowledged tensions between the different member organisations. While EADTU members acted unanimously in seeing off the threat of a Commission imposed European Open University, they were unable to come up with a creditable and sustainable alternative. While EADTU shares a common enterprise in its focus on distance education, nevertheless the competing enterprises within the organisation, not least the tension between the large-scale open universities and the smaller scale national consortia have prevented an epistemic community, in the strict definition of the concept, from emerging. The failure to capitalise on the major achievements of the ODL *Memorandum* and the Maastricht Treaty serve to refute the hypothesis that EADTU, or indeed any other ODL network could be classified as an epistemic community.

The advocacy coalition framework offers perhaps more potential in explaining the role of networks in ODL policy-making. As the above analysis has shown, the ODL policy field has involved a number of competing networks particularly in the crucial 1987-1993 period, all competing for Commission funding and support, with some amenable to following the Commission's policy line, rather than seeking to influence it. The EADTU's lobbying against the European Open University is perhaps one example of a successful advocacy coalition, however, there are few other successful examples to report. It would appear that

networks have rarely been internally cohesive to the extent that they have succeeded in making any significant impact on the Commission's ODL policy.

The industry groups may indeed have shared a common set of causal beliefs in lobbying the commission to encourage increased training and the use of new technologies, and ERT has been fairly consistent in this regard over the years. However, ERT has never specifically targeted an ODL policy. ELIG is attempting to act as an advocacy coalition in persuading the Commission to invest in an elearning market in Europe, however it too would appear to lack the internal cohesion and shared beliefs which would make it an effective player in the long term.

In summary, ODL policy in the European Union was initially spearheaded by a small number of policy entrepreneurs who had the drive and vision to pilot ODL onto the centre stage of EU educational policy between 1987 and 1993. However, once on the stage, competing interests served to deter consensus on the way forward. The plethora of networks competed against each other to influence the Commission and to obtain funding to ensure their survival. In this evolutionary scenario, the 'fittest' networks survived through developing their own particular niche within the policy landscape. Through a largely unquestioning acceptance of the Commission's shift in the mid 1990s towards integrating multimedia and technology in mainstream education and training, it is argued that the ODL networks allowed ODL to disappear from the policy agenda.

In the next chapter the way in which the Commission has sought to 'encourage the development of distance' education through its action programmes will be analysed.

## Chapter 8: Implementing ODL Policy: Rhetoric and Reality

*Implementation is the complex process of putting a policy into practice by a variety of mechanisms and procedures involving a wide and diverse range of actors* (Dimitrakopoulos and Richardson, 2001: 336).

### 8.1 INTRODUCTION

This chapter examines the way in which the EU set about implementing its policy on distance education and training since the mid 1980s. The evaluation of policy implementation may seem relatively straightforward: for example, Dublin City experienced traffic congestion for many years; the solution was to build a new bridge across the River Liffey and to charge motorists a toll. The bridge was built with private sector funding; it has stayed up without falling down and has made vast profits for the company which operates the toll; however, it has not solved the problem of traffic congestion in Dublin. It is not uncommon for implementation programmes to fail to solve the problem they were designed to address. In many cases, the explanatory theory behind the policy is flawed; and errors are made in linking cause and effect. One example which has been cited is the use of training as the panacea for solving unemployment problems. Training programmes may succeed in increasing skills levels, but they may have no impact on unemployment levels which result from structural factors rather than skills shortages (Dimitrakopoulos and Richardson, 2001: 336).

Powerful organisations are not always successful in implementing policies that achieve the desired results. Pressman and Wildavsky (1973) carried out a classic study of the failure of implementation of a large \$23 million federal project in the 1960s, entitled *Implementation (How great expectations in Washington are dashed in Oakland or why it's amazing that federal programmes work at all)*. It might be argued that great expectations in Brussels of the potential, initially of distance education, and later multimedia and elearning to transform the education and training system have encountered similar barriers at the implementation stage. The history of implementation of the EU's ODL policy has been somewhat inauspicious. It has been suggested that the reasons for the EU's relative lack of success in developing a European ODL market lies in the top down approach adopted in identifying goals and allocating resources (Baumeister, 1999). The EU's ODL policies are primarily driven by economic goals and the demands of industry, concerns with globalisation, and competitiveness, and tend to ignore the realities of institutions which are located in specific national cultures and environments, with separate identities, roles, structures and target groups.

This chapter summarises the main features of sixteen implementation programmes which have attempted, with varying outcomes, either to use ODL to solve economic, political and/or social problems, or to embed ODL in education and training systems. One problem is that over the course of these programmes, the emphasis shifted to multimedia and technology, to the extent that ODL is rarely if ever mentioned by the action programmes, despite the constant reminders of evaluators, expert groups and formal committees of the need to focus on pedagogy and the needs and interests of the end users, teachers and students. Section 8.2 reviews the main characteristics of the programmes as they impacted on ODL. Section 8.3 discusses the push and pull factors involved in participation in implementation programmes. Section 8.4 then reviews the cumulative impact of the programmes through two case studies. The new generation of implementation programmes to be introduced in 2006 will then be discussed in Section 8.5. Finally, the chapter will

attempt to summarise what has been achieved through these programmes, how sustainable is the achievement, and to what extent have these actions solved the problems they were intended to solve.

## **8.2 THE IMPLEMENTATION PROGRAMMES**

The Commission is responsible for implementing policies on behalf of the Community. Policies affecting education and training are generally implemented by DG Education Youth and Culture (formally DGXXII) however initiatives may also be implemented by other DGs responsible for employment, social affairs, regional policy, information technology etc. Interestingly, Hake points out that initiatives supported by other DGs are often more generously funded than those in the DGXXII (now DG Education and Culture) (Hake, 1999). He comments that ‘open and distance learning is one such notable field where the DELTA programme for new learning technologies was brought forward as part of the EU’s telematics policy with a massive financial injection’ (Hake, 1999: 58). Field views the very active period between 1986 and 1991 when nine programmes<sup>312</sup> were initiated by the Commission as achieving, in hindsight, little of lasting value in itself, other than awareness raising. However, its legacy might be seen in the way in which post 1992 ‘the process of European integration started to permeate the farthest reaches of the education and training system’ (Field, 1998: 45). The programmes reviewed here focus on a number of EU policy objectives, with some aiming to meet multiple objectives including: growth competitiveness and employment; European integration and cohesion; the Information Society; and lifelong learning. The main features of the implementation programmes are summarised in Table 8.1 below. The contribution of these programmes to ODL and elearning will be discussed in the next section.

### **8.2.1 ESPRIT 1984-1994**

While ESPRIT (The European Strategic Programme for Research and Development in Information Technology) was not involved in education or training per se, it was seen as part of a suite of programmes aimed at increasing Europe’s technological capacity<sup>313</sup> and demonstrated how media and technology could be used in distance education (Fox, 1990: 14.). It was seen as a model programme and testbed for subsequent Community research and development programmes.

Esprit has become a symbol of the technological awakening of a European community which has decided to take its future into its own hands. Along with its companion programmes, it stands at the heart of the European Commission’s strategy for supporting transnational cooperation in the context of the large [sic] market.<sup>314</sup>

The establishment of ESPRIT was stimulated by concerns about the impact of competition from Japan in the IT sector (Field, 1998: 169). ESPRIT was launched in February 1984 for a ten year period, with three objectives: promoting cooperation in IT between industry, universities and research institutions; to provide Europe with technology necessary to meet the competitive requirements of the international market; and contribute to the development and international recognition of technical standards for the development of IT.<sup>315</sup> A total of 227 projects were selected in the first five-year phase, involving 536 entities, 200 universities and research institutes, and 3,000 full time researchers, and a budget of 1.5billion ECU. The programme concentrated on technological research and development

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<sup>312</sup> COMETT; ERASMUS; EUROTECNET; FORCE; LINGUA; PETRA; TEMPUS; YES; IRIS

<sup>313</sup> CEC 1989 ESPRIT: key to the technological awakening of Europe. *European File* November 15/89 p10.

<sup>314</sup> Ibid: p11.

<sup>315</sup> Ibid: p4.

projects, for example work on chips, or sensor systems, computer controlled manufacturing etc. The budget was doubled to 3.2 billion ECU for ESPRIT II, which concentrated on microelectronics and peripheral technologies; technologies and tools for information processing systems; computer integrated production as well as a basic research strand.

**Table 8.1: EU Implementation Programmes 1984-2004**

Short title	Full title	Duration	Impact on ODL
ESPRIT I & II	European strategic programme for research and development in information technology	1984-1989 1990-1994	Limited
EUROTECNET I & II	To promote innovation in the field of basic and continuing vocational training	1985-1989 1990-1994	Mainly training
COMETT I & II*	Community programme in Education and Training for Technology	1986-1989 1990-1994	Significant
ERASMUS	European Community action scheme for the Mobility of University Students (subsumed in SOCRATES 1995-2005)	1987-1994 1989-1992	Negligible
DELTA I & II	Developing European Learning through technological advance	1989-1991 1990-1994	Significant funding; technology oriented
EuroForm	To promote measures concerned with new qualifications, skills and employment opportunities resulting from the completion of the internal market and technological change.	1990-1993	Substantial funding for ODL based projects under EuroForm
NOW	New Opportunities for Women in employment and vocational training	1990-1993	
Horizon	Disabled and people with job access difficulties; emphasising new technology, distance training; adaptation to the workplace	1990-1993	
LINGUA*	Action programme to promote foreign language competence in the European community	1990-94	Negligible
TEMPUS* I, II, III	Trans-European Mobility Scheme for University Studies	1990-2004	Limited; CEC
PHARE MCDE	Phare Multi-Country Distance Education programme	1994-1999	Short term significance
Jean Monnet Project	Modules in European Studies	1990-	Negligible
FORCE	Action programme for the development of continuing vocational training in the European Community	1991-94	Negligible
ODL Call	Community Development and Demonstration Action in the Field of Open and Distance Learning	1994	Limited to small no of projects
Leonardo da Vinci I & II	Improving the quality and innovation capacity of vocational training systems	1995-1999 2000-2006	Training; limited significance to ODL
SOCRATES I & II	Open Distance Learning Action Minerva Action	1995-1999 2000-2006	Non ODL institutions benefited
Multimedia Call	Educational Multimedia Task Force Joint Call for	1996	Limited
ELearning Initiative	Initiative to support elearning in education and training	2002-2006	Small no of projects
Research Framework Programmes 1 - 6	Programmes to support R&D in ICTs and technology	1989-2006	Large funding; small no of ODL institutions

Sources: CEC 1993 Commission Working Paper: Guidelines for Community Action in the field of education and training COM(93) Final Brussels 5 May 1993; other details taken from Commission documents and reports.

## 8.2.2 EUROTECNET I AND II 1985-1994

The EUROTECNET<sup>316</sup> programme (1985-1994) marks the Commission's first involvement in supporting and promoting open and distance learning. It addressed the impact of technological change on vocational training systems through dissemination of innovative projects and transnational partnerships. During Phase 1, research was carried out on the potential of training with open learning and self learning using the new technologies (CEC,

<sup>316</sup> Phase I (1985-1989) was based on a Commission Communication COM(85) 167 Final. Phase II (1990-1994) was based on Council Decision 89/657/EEC of 18 December 1989 OJ 1989 L393/29 30 December 1989.



1989). EUROTECNET II (1990-1994) was managed by the Task Force on Human Resources, Education Training and Youth, and focused on training projects using distance and open learning and multimedia (Charters d'Azevedo, 1991a: 23). 'Distance learning' was defined as the 'use of telecommunications and other distance communications to promote learning'; multimedia learning was referred to as 'the use of a variety of technology based learning delivery systems to assist the flexible attainment of different and/or 'individualised' training objectives, e.g. open learning, flexible learning, resource centres, technology based learning etc.' (EUROTECNET, 1991: 16) Of the 277 projects funded in 1991, nine projects described the main learning methodology as 'distance learning'; a further 50 described the methodology as 'multi-media learning technologies'; and 59 were using 'self-learning'. The other projects used a mix of methodologies including work-based learning, project-based learning etc. (EUROTECNET, 1991). While most of the projects were in the training sector (e.g. 9 of the 17 Irish funded programmes were managed by FÁS), a small number of higher education programmes were funded e.g. a Postgraduate programme in Environmental Protection in Sligo Regional Technical College and a Training the Trainers programme in University College Galway (EUROTECNET, 1991).

### 8.2.3 COMETT 1986-1994

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, 1991b: 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 control 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).

The initial proposal to establish COMETT emerged at a meeting in Galway in 1984 which recognised the need to translate high quality research from universities to industry (O'Sullivan, 1992). COMETT I<sup>317</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).

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<sup>317</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

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 SATURN was 'to bring together organisations - industrial, commercial and educational, with a view to putting proposals forward for EEC funding under the COMETT programme.'<sup>318</sup> COMETT's 'midwife support' was also partially responsible for the establishment of EUROPACE (Prosser and Durando, 1992: 342).

COMETT II was adopted by the Council of Ministers on 16<sup>th</sup> December 1988<sup>319</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 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 networks, EADTU, SATURN, EUROSTEP and EUROPACE received significant funding under COMETT II.

#### **8.2.4 ERASMUS 1987-**

The ERASMUS (the European Community Action Scheme for the Mobility of European Students) programme was seen as a significant milestone as well as a path-breaker in EU educational policy (Field, 1998: 47). Erasmus had its origins in the 1976 Action programme which aimed to remove the obstacles preventing the free movement of workers and students across borders. Some 500 joint study programmes had been supported in the ten years before the establishment of Erasmus and had proved the potential of joint study programmes to facilitate cooperation in higher education involving networks of academics in different countries (Corbett, 1999; Nihoul, 1999: 129). The initiation of the programme was not without controversy with a number of challenges to the legal basis of the action, followed by acrimonious debates about the budget (Field, 1998: 46). The establishment of ERASMUS is an example of the role of individuals and informal networks in policy-making. Former Taoiseach Garrett Fitzgerald had been informed by the president of UCD, Dr Paddy Masterson, that the European Ministers for Education were reluctant to approve spending on the proposed ERASMUS programme; during a break at the London Council meeting in December 1986 Fitzgerald raised the matter informally with French Prime Minister Jacques Chirac; together with the German foreign minister Hans Dietrich Genscher they managed to gain support to overrule the objections of the Ministers for Education, thereby enabling ERASMUS to get off the ground (Fitzgerald, 1999: 138).

The main objective of ERASMUS is to support mobility between Community countries of students, teachers and researchers and greater cooperation between the universities. Actions include the development of a European University Network through joint development of courses, the provision of student mobility grants, the development of the ECTS (European Credit Transfer System) and cooperation in the development and delivery of joint courses.

The impact of ERASMUS on ODL is relatively marginal. According to Fox (1989) ERASMUS paved the way to integration of distance education into the overall education

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<sup>318</sup> Glyn Martin, Circular letter announcing the formation of SATURN dated 18 December 1986.

<sup>319</sup> 89/27/EEC on COMETT – Community Programme in Education and Training for Technology OJ L13 17 January 1989.

structure by providing support to the EADTU's EOUN initiative, and the Dutch OU's participation in the ECTS scheme. Nevertheless, the student mobility programme regulations excluded distance learners who were unable to participate in the obligatory three month visits due to work or domestic restraints (Field, 1998: 113). A report on the ERASMUS ICPs (Inter-University Cooperation Programmes) for 1993-1995 revealed that approximately 30 ICPs had reported that they were using ODL, but this had merely involved using various media which had not served to 'increase access to learning or increased even the flexibility of learning for a single learner' (Latva-Karjanmaa and Auvinen, 1996: 3). The same report commented on the 'remarkably low participation of open universities and open learning institutions, or even mixed mode higher education institutions in the ICPs' (Latva-Karjanmaa and Auvinen, 1996: 3). ERASMUS was brought under the umbrella of the Socrates programme from 1995, but retains much the same functions. The one millionth student took part in the ERASMUS mobility programme in 2002 (Gutierrez-Diaz, 2003: 26). Problems still remain with regard to involving distance learners in the ERASMUS mobility programmes although the new generation programmes from 2006 may include proposals for virtual mobility.<sup>320</sup>

### 8.2.5 DELTA I AND II (1989-1994)

The DELTA (Developing European Learning through Technological Advance) programme provided substantial funds to distance education institutions to develop and test multimedia products and services, albeit with some disappointing results. DELTA was adopted by the Council of Research Ministers on 29 June 1988<sup>321</sup> (CEC, 1989: 12). The exploratory phase was funded by the Community's Second Framework Programme for research and technology development with the follow up in the Third Framework (Rosello, 1993b). The exploratory phase in 1989-90 had a 20MECU budget; 30 projects were supported in the first phase, most of which were designed to enhance the range and efficiency of distance education methods (Fox, 1989). Thirty projects were selected in the second phase<sup>322</sup> with a budget of 49MECU.<sup>323</sup>

DELTA aimed to apply advanced information and telecommunications technology in education and further education programmes; to develop tools and infrastructures to support distance learning; and to expand the market for distance and open learning in Europe. The programme focused on testing the potential of technology; the areas of research included learning systems; advanced learning technologies, testing and validation of existing technologies including video-conferencing, development of standards for interoperability as well as telecommunication policies, and copyright. The Commission were very optimistic about the impact of DELTA:

Information technology adapted to the needs of learning can potentially enrich and enhance educational services; traditional institutions can via open learning, distribute education and training into new environments such as home and workplace, reach groups of the population such as the handicapped or homebound persons, and teach job-related skills in the use of technology (CEC, 1987a).

It was expected that DELTA would benefit users of learning technology and would strengthen the market competitiveness of the sector (Van den Brande, 1993b). DELTA would integrate research results from ESPRIT and RACE, and use the networks set up under

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<sup>320</sup> Commission Official DGEAC Interview 17 May 2004.

<sup>321</sup> OJ L 206 30 July 1988.

<sup>322</sup> The Council of Ministers agreed a successor programme to the DELTA exploratory action in 1990 (Decision 90/221/Euratom/EEC: OJ L117, Vol33, 8 May 1990);

<sup>323</sup> Corinne Hermant DELTA Unit EADTU *News* 10 May 1992 p31.

COMETT to validate the resulting applications (Charters d'Azevedo, 1991a; Paulsen, 1992; Rosello, 1993a; Rosello, 1993b). However, the Commission's optimism was not rewarded. Weimar described the relationship between DELTA and COMETT as

A probably over critical outsider's view would seem to indicate that DELTA is developing a giant system of plumbing through whose pipes may flow all forms of education training information but without sufficient attention to what must flow through the pipes. COMETT is developing relationships and education [sic] which may some day use the plumbing system. Tempus has set out to duplicate some of West European COMETT like activity for central and Eastern European countries. Yet the three programmes do not seem to form part of a coherent strategy (Weimar, 1992: 395).

DELTA was criticised for its technological focus, with its conception of open learning lacking theoretical focus or cultural awareness (Chambers, 2003; Strydom and O'Mahony, 1992). The programme's exploratory phases

uncovered a complex field in which technology, cultural diversity, personal motivation and costs are all interwoven. This phenomenon hinders the adoption of simple solutions to the growing problem of training in Europe.<sup>324</sup>

Among the barriers to innovation identified in the DELTA exploratory phase were 'telecommunications tariffs, regulatory issues, transferability of resources, cross-cultural problems, market fragmentation' (Rosello, 1993b: 23).

While the Commission regarded the programme as effective in producing knowledge, in particular in the area of costing the new technologies, it was acknowledged that some projects had proved to be 'disasters',<sup>325</sup> with others producing at best disappointing results (Baumeister, 1999; MacKeogh, 1991). Baumeister (1998) cites an evaluation of the DELTA programme carried out by the Tavistock Institute which found that:

The results of the programme were on the whole disappointing, caused, according to the evaluators, above all by the fact that a top-down policy was adopted: programmes were designed on the drawing board, in a technology-oriented environment, without asking in any detail about the needs of the learners. Uppermost in the minds of the project partners was the will to do what was technically possible. This was not, however, accepted by the students. As a major consequence, the EU-Commission has in its new lines of action put great emphasis on including the users in the design of learning environments (Frade, et al., 1995: quoted in Baumeister 1998: 20).

### **8.2.6 LINGUA 1990-**

The LINGUA<sup>326</sup> programme 1990-1994 was designed to promote foreign language knowledge in the European Union through improving language teaching and learning of foreign languages within the Community. Funding of 200MECU was allocated to the first phase of the programme. LINGUA was initially resisted by the UK, Germany and Denmark due to concerns about EU involvement in national curricula or in student exchanges at secondary level. The debate on this issue invoked the concept of subsidiarity to restrict EU involvement in the coordination, technical support and provision of language teaching for the employed (Beukel, 1993: 163; Laffan, 1992: 137). From an early stage the Commission was interested in the potential of distance learning in language teaching. Charters

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<sup>324</sup> Delta 1990 Research and Development in the field of training technologies based on information and communication: priorities for new training and education technologies in the 1990's. Quoted in (CNED, 1993).

<sup>325</sup> Commission Official DGEAC 23 September 2004.

<sup>326</sup> Council Decision 89/489/EEC OJ L239 898 p 24.

D’Azevedo (1991a: 23) reported that Lingua had ‘a major commitment to distance learning approaches in increasing the linguistic competence of young people and employees all over Europe’ and encouraged EADTU<sup>327</sup> to develop projects in this area, despite the fact that using distance teaching methodologies to teach languages was notoriously difficult. EADTU organised a large-scale conference on distance education and languages in Paris ‘Babel á Domicile’ in Paris in February 1990 with Lingua funding.<sup>328</sup> Lingua has been included under the Socrates programme since 1995 however, the programme has had little impact on distance education.

## **8.2.7 EUROFORM-NOW-HORIZON 1990-1993**

The Commission revised its human resources programmes in the early 1990s, bringing together the EUROFORM, NOW (New Opportunities for Women) and Horizon (aimed at disadvantaged people) programmes under a common EMPLOYMENT framework (Field, 1997b). The EUROFORM programme was concerned with the development of new qualifications, new skills and new employment opportunities, resulting from the completion of the internal market and technological change. It was designed to promote the establishment and operation of transnational partnerships in vocational training. It was also designed to strengthen the implementation of existing programmes and networks such as EUROTECNET and FORCE while ensuring the overall cohesion of these programmes with the objectives set out in the structural funds. EUROFORM had a budget of 300MECU. In the context of distance education, it is interesting to note that Hywel Jones left the Task Force to take responsibility for DGV’s EUROFORM-NOW-HORIZON programme in 1993.<sup>329</sup> The EADTU played a role in influencing the inclusion of an Open Distance Learning initiative within the framework of the EUROFORM-NOW-HORIZON programmes.<sup>330</sup> This initiative allowed for 50mecu support to ODL projects. EUROFORM funded a number of distance education initiatives, including the satellite-based Certificate in Health and Safety developed and delivered by the Audio-Visual Centre in UCD for a number of years.<sup>331</sup> One interviewee<sup>332</sup> commented that in his experience, the EUROFORM programme was the most effective in supporting distance education. It focused on training and teaching, rather than on research or innovation, and funded solid viable programmes. In addition its rules were less restrictive than other programmes, both in terms of partnerships, reporting arrangements and in the scope of activities.

The ADAPT programme also funded distance education course development. ADAPT was aimed at helping European companies to adapt to industrial change and comprised four goals, to help companies improve their training strategy and content; to gear training and guidance to support competitiveness; help safeguard existing jobs by improving general skill levels; and developing training and guidance which anticipate future industrial changes (Field, 1998: 69). Field points out that the ADAPT and EMPLOYMENT programmes were as important as the Socrates and Leonardo programmes in terms of their size and impact (Field, 1997b: 4).

## **8.2.8 JEAN MONNET PROJECT 1990-**

The Jean Monnet Project was launched in 1990 with the aim of providing subsidies to the universities to facilitate the introduction of European integration studies. Between 1990 and

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<sup>327</sup> EADTU *News* 1 April 1989.

<sup>328</sup> EADTU *News* 3 February 1990.

<sup>329</sup> Hywel Jones Editorial *Community Initiatives and Human Resources Newsletter* July 1993 No 5 p1.

<sup>330</sup> EADTU *News* 11 September 1992 p5.

<sup>331</sup> Michael Foley Interview 27 April 2004.

<sup>332</sup> Jim Devine, Interview 19 March 2004.



2004, the project funded the establishment of 90 European Centres of Excellence, 635 Jean Monnet chairs and 1,625 courses and European modules.<sup>333</sup> While the main focus of the project is on traditional face-to-face education, nevertheless, the funding for course module development, while modest, has been applied to the development of distance education modules. With its relatively light bureaucratic structures, and uncomplicated application procedures, it is the only EU implementation programme which focuses on course development, without any requirements for 'innovation' or complex transnational partnership arrangements. Funding for module development is contingent only on the institution agreeing to support the teaching of the module for a total of seven years, which in itself guarantees the sustainability of the programme. From 2004 the project will come under a Community action programme to promote bodies active at European level.<sup>334</sup>

### **8.2.9 TEMPUS I, II, III 1990- 2006**

The TEMPUS<sup>335</sup> programme (Trans-European Mobility Scheme for University Studies) was adopted in 1990, and combined features of ERASMUS, COMETT and LINGUA with specific reference to restructuring higher education and training in the Central and Eastern Europe countries (De Witte, 1993: 192). The areas of cooperation were the development of education programmes in priority areas; reform of higher education structures and establishments and their management; and development of training leading to qualifications to close skills gaps in the developing economies (CEC, 1997c: 64). Special funding was available under the PHARE reconstruction programme to target pre-accession countries (Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia) to prepare them for accession to the EU and for access to the Socrates and Leonardo programmes. The main thrust of the TEMPUS programme is towards modernisation, reconstruction and the restoration of democracy and civil society. The TEMPUS programme has been criticised: the majority of funding often stayed with the Member States delivering 'know-how'; tensions arose because of the often patronising attitudes, use of second-rate staff and financial selfishness; the ad hoc and ephemeral nature of projects was also a problem, with often nothing sustainable left following the completion of the projects (Teichler 1996 quoted in Field, 1998: 99).

Distance education was a prominent feature of the TEMPUS programmes with many Western distance teaching institutions involved in projects designed to establish a distance education system in the accession countries. According to Charters d'Azevedo the OUs were at the forefront of TEMPUS.

An operational plan for the TEMPUS scheme has been developed at a pan-European conference held in Budapest, organized by the ICDE, which was supported by the European Commission. The establishment of European study centres in the major cities of the Central and Eastern European countries will be the cornerstone of a long-term plan of action (Charters d'Azevedo, 1991a: 23).

The PHARE programme was an overarching framework designed to support the reconstruction of the central and eastern European countries following the collapse of

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<sup>333</sup> Belen Bernaldo de Quiros, Jean Monnet Project Note for attention of the Jean Monnet professors and rectors 20 February 2004.

<sup>334</sup> Commission proposal to for a European Parliament and Council Decision establishing a Community action programme to promote bodies active at European level and to support specific activities in the field of education and training COM(2003)273 Final Brussels 27 May 2003; adopted by European Parliament 10 March 2004.

<sup>335</sup> Council Decision 90/233/EEC of 7 May 1990 OJ L 131 25 May 1990 TEMPUS; Council Decision 93/246/EEC of 29 April 1993 OJ L 112 6 May 1993 TEMPUS II; Council Decision 96/663/EC of 21 November 1996 OJ L 306 28 November 1996 TEMPUS II bis.



communism. In 1993, the Commission requested the EADTU<sup>336</sup> to prepare a feasibility study for the PHARE Multi-Country Distance Education programme. This programme set out to establish a common framework for distance education in eleven countries, based on the EADTU EuroStudyCentre model. The pilot programme (1994-1995) with funding of 4MECU, established a network of forty local study centres, and eleven national contact points. EADTU coordinated a three month training the trainers programme to academics in the eleven countries involved (MacKeogh and Baumeister, 2000: 13). A follow-up programme between 1995-1999 with a fund of 11MECU focused on four main developmental components aimed at embedding ODL approaches within the national systems; i.e. infrastructure, course and content development, strategy and transnational cooperation and development. The PHARE programme was described by one interviewee as very effective in that it provided a critical mass of funding for a defined project with clear goals. However, the formal evaluation found that while much had been achieved by the programme, the shift in political emphasis from assisting the PHARE countries in modernising their education structures to preparing their systems to meet the *acquis communautaire* in the context of accession to the EU meant that many developments encountered difficulties in continuing in the absence of a dedicated funding programme (Steinbeis Transfer Centre, 2001). Instead, the accession countries were expected to compete with the other Member States for funding under the Socrates, Leonardo and Framework programmes (MacKeogh and Baumeister, 2000).

The Council adopted Tempus III<sup>337</sup> aimed at the TACIS countries (e.g. Albania, Bosnia, etc) to run from 1 July 2000 to 30<sup>th</sup> June 2006; among the types of projects to be supported are development of open and distance learning systems, including information and communication technology. The aim of Tempus III is to

promote, in line with the guidelines and general objectives of the PHARE and TACIS programmes for economic and social reform, the development of the higher education systems in the eligible countries in particular in reform of curricula, structures, management, qualifications, and the contribution of higher education and training to citizenship and strengthening of democracy.

## **8.2.10 FORCE 1991-1994**

FORCE<sup>338</sup> was an action programme for the development of continuing vocational education in the EU, with a budget of 24MECU. It aimed to encourage investment in continuing vocational training, methodology and equipment to take account of the completion of the internal market and to improve the effectiveness of vocational training. It funded a small number of distance learning projects.

## **8.2.11 ODL CALL 1994**

While the Commission worked on proposals for the new generation of programmes for 1995-1999, a once off call for projects in open and distance learning was issued. The call was a joint initiative of the Task Force, DGXII and DGXIII. The relatively modest funding of 1MECU was to fund no more than four projects aimed at demonstrating and developing 'the possibilities for practical and effective open and distance education and training across the Community via demonstration projects linking the fields of education/training, research

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<sup>336</sup> EADTU News 14 August 1993 p25.

<sup>337</sup> Council Decision of 29 April 1999 adopting the third phase of the trans-European cooperation scheme for higher education (Tempus III) (2000-2006) OJ L 120 8 May 1999 pp30-36.

<sup>338</sup> Council Decision 909/267/EEC OJ L156/90.

and telematics'.<sup>339</sup> The call generated 126 proposals; EADTU obtained funding for the launch of its European Open University Network (EOUN) project.<sup>340</sup>

## **8.2.12 SOCRATES I AND II 1995-2005**

Following a review of the programmes and initiatives described above, which were due to come to an end in 1994, the Commission presented proposals for the new generation of programmes in May 1993.<sup>341</sup> The major proposal was to streamline and rationalise the plethora of initiatives into two major programmes: Socrates aimed at education; and Leonardo da Vinci aimed at training. It was hoped that the two programmes would avoid fragmentation, provide better value for money, streamline the machinery at national level to ensure better articulation with national measures, and provide a clearer focus for evaluation measures (CEC, 1993a: 12).

The Socrates<sup>342</sup> programmes represented the Commission's first major opportunity after Maastricht to put the commitment to encouraging the development of distance education into practice. The debates preceding the adoption of the Socrates action are perhaps indicative of the Commission's subsequent ambivalence to distance education as a concept. The Commission's proposal referred to open and distance teaching as a 'stage towards the establishment of more flexible and effective systems of education, especially through taking account of the growing importance of more powerful and interactive technologies'.<sup>343</sup> The title for the action proposed by the Commission prioritised ICTs, with ODL as a second element: the Commission initial title for the action was 'Promotion of Information and Communication Technologies and Open and Distance Education and Learning'. However the title agreed by the Council Decision restored the emphasis on 'Open and Distance Learning' and dropped the reference to ICTs. The Socrates programme included 'vertical' actions aimed at schools (Comenius), and higher education (Erasmus), as well as horizontal actions linking all sectors. The ODL action budget for 1995-1999 was 31.4 MECU. As one of the aims of Socrates was to embed ODL in national education systems, whether at school or university level, funding was also available for adoption of ODL approaches in other actions in the programme.

The Vademecum prepared for the first year of Socrates described ODL as

being concerned with the use of new resources (technical and/or non-technical) for rendering the learning process more flexible in terms of space, time, content, selection, access to qualifications and teaching resources and/or for improving distance access to education systems. In this way, educational opportunities are extended to people who, because of their geographical, economic or socio-professional situation or because of a handicap do not readily have access to the mainstream system of education. Open and distance learning can help overcome barriers to transnational mobility and develop a kind of virtual mobility – an essential factor in constructing an open area for educational cooperation at European level (CEC, 1995a: 30).

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<sup>339</sup> Calls for proposals concerning a Community development and demonstration action in the field of open and distance learning 94/C78/12 OJ C 78/15 15 March 1994.

<sup>340</sup> Minutes 20 July 1994 EADTU Executive Meeting – by audio conference.

<sup>341</sup> CEC 1993 Commission Working Paper: Guidelines for Community Action in the Field of Education and Training COM(93)183 Final Brussels 5 May 1993.

<sup>342</sup> Decision No 819/95/EC of the European Parliament and of the Council of 14 March 1995 establishing the Community action plan 'Socrates' OJ L87 38 20 April 1995 p10.

<sup>343</sup> Commission of the European Communities Proposal for a European Parliament and Council Decision establishing the Community action programme 'Socrates' COM(93) 708 Final Brussels 03 February 1994 p6.

The final text had been agreed following an intervention from the Socrates Committee<sup>344</sup> which requested the Commission to place the ‘emphasis more firmly on ODL as such as distinct from the use of new information and communications technology in education’. In an interesting example of the Commission’s persistence in prioritising technology, the concept of ODL in the guide for applicants published the following year was again firmly linked with multimedia and technology: ODL was to be

understood in a double sense, referring to: the introduction of new modes of ‘open’ learning through all available delivery mechanisms, notably multimedia products and services, in all places where some form of education may occur; [and] the provision of ‘distance’ learning services. Open and distance learning (ODL) involves the use of new methods – technical and/or non-technical – to improve the flexibility of learning in terms of space, time, choice of content, or teaching resources, to enhance the quality of conventional education and/or to improve access to educational systems from a distance (CEC, 1996c: 66).

The priorities which the Socrates (1995-1999) ODL action was required to tackle included:

- Promotion of good and innovative practice in education
- Exchange and sharing of expertise and experience
- Creation of sustainable transnational networks
- Increasing the ‘visibility’ of ODL
- Improvement of the quality of conventional educational systems
- Using ODL to overcome barriers to educational opportunity
- Dissemination of information about ODL
- Supporting the development of the European dimension in education

Between 1995 and 1998, some 133 ODL projects were funded under the Socrates ODL action (with an average funding of €105,000 per project) involving the partnership of over 1,000 institutions throughout Europe. According to the Commission, the ODL action was successful in bringing together most of the organisations active at European level to explore the potential of ICTs in education (CEC, 1999a). These projects included cooperation between higher education institutions, between schools, and other organisations; development of information services to stimulate European cooperation; and studies and analyses of various aspects of ODL (CEC, 1999a). A preliminary analysis of the outcomes of this action showed that there was little evidence of the development of educational multimedia products, capable of sustainable use after the end of the period of project funding (CEC, 1999a; MacKeogh and Baumeister, 1998). This is perhaps not surprising in view of the limited funding and short duration of project funding. Project funding was granted for one year at a time, and projects extending beyond this period were required to apply for renewal of funding, without a guarantee that such funding would be forthcoming. In the absence of more concrete outcomes and products, there was a shift in emphasis to understanding processes and the use of ICTs in education (CEC, 1999a). In addition, the funded projects tended to emphasise integration of the ICTs into the traditional education system, rather than on targeting ODL students. ICTs were used in a number of ways: to either alternate with or replace the human equivalent in conventional educational systems; alternating with or replacing earlier educational technologies in distance learning; or carrying out innovative activities which were previously impossible. The emphasis on the final round of projects selected in 1999 was on dissemination of the outcomes of the earlier projects.

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<sup>344</sup> Socrates Committee comprising two nominees of each Member State set up to advise the Commission on the Socrates programme.. Minutes of Meeting of 10-11 April 1995 SOC/COM/95/016.

There was considerable conflict between the Commission, the European Parliament and the Member States in the debate on the Second Phase of Socrates and Leonardo, although some of these difficulties were no doubt linked with the crisis in the Leonardo Technical Assistance Office which led to the resignation of the Commissioner, Edith Cresson, and eventually that of the whole Commission in 1999 (Ertl, 2003). These difficulties delayed the startup of the new programmes, with Socrates II not starting until Autumn 2000. The renewal of the ODL action in Socrates II (2000-2005) was hotly debated; one Commission official mentioned that it was a struggle to have ODL accepted as a specific action line in the face of opposition both within the Commission as well as from some Member States. The struggle over the name for the action was also indicative of the tensions within the Commission between the technologists and the educationalists. An early proposal suggested an action: 'Education and Information and Communications Technology' with the aim of supporting 'transversal measures relating to open and distance education and the use of information and communications technologies including multimedia, in the field of education'.<sup>345</sup> The Commission then proposed that an action called ATLAS (Accessible Teaching and Learning Across educational and technological Systems) would replace the ODL action but the UK and Austria were very much opposed to a named action; finally with the support of a number of MEPs, and national lobbying, the Minerva action was agreed.

The ODL and Minerva actions were seen as providing space to experiment; they gave status and visibility to ODL.<sup>346</sup> The original focus had been on a top down model designed to develop a common infrastructure to deliver projects.<sup>347</sup> The evaluation of the first phase of the ODL action commented on the changing technologies, including the Internet, which had altered the focus of the actions over the course of the programme (CEC, 2001c). Overall, some €33 million was expended on 166 projects under the ODL action in the period, with greater participation from traditional universities and schools than ODL institutions. This trend continued in the second phase of Socrates, where the Minerva action supported ODL and ICT in education. Projects under the Minerva action received funding of €1.65 million in the four years 2000-2003, although annual funding dropped from €10 million in 2000 (4.3% of the total) to €6.9 million (2.6% of the total) in 2003 (CEC, 2004c). The reduction in expenditure is accounted for by the declining rate of acceptance of proposals. In 2000, 183 proposals were received, of which 73 (40%) were accepted. In 2003, of the 299 pre-proposals, just 30 (10%) were successful. Nevertheless, 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, 2004c: 26). While acknowledging the rise in number of project proposals submitted there was no comment or explanation of the low success rates of these proposals. An examination of the institutions involved in these partnerships shows only one fifth of projects had partners or coordinators from ODL institutions.

The results of the consultative exercise in 2003 found little support for the Minerva programme. As evidence of the eclipse of ODL by the ICT focus, one Ministry source was quoted as saying

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<sup>345</sup> Draft Decision by the European Parliament and of the Council establishing the second phase of the Community action programme in the field of education (SOCRATES) 12270/98 p29 Brussels 22 October 1998, circulated by Dept of Education to the author 30 October 1998.

<sup>346</sup> Commission Official Interview 17 May 2004.

<sup>347</sup> Discussion Document B Substantive issues relating to the programmes actions and the management of the programme as a whole. Socrates II Programme Meeting of National Expert Brussels 27 April 1999 SOC/COM/99/027.

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 (Pole Universitaire Europeen, 2004: 102).

The new generation of programmes to follow SOCRATES in 2006 propose a separate action line on ICT but references to specific support for ODL have been dropped on the assumption that ODL is now embedded in all sectors of education.<sup>348</sup> Perhaps as a sign of the Commission's impatience with the slow pace of adoption of ICTs through the SOCRATES programme, two parallel initiatives took place between 1995 and 2004 which were focused more explicitly on speeding up the process of adoption in the education and training sector. The Educational Multimedia Task Force Call and the eLearning initiative will be discussed below.

### **8.2.13 THE EDUCATIONAL MULTIMEDIA TASK FORCE JOINT CALL 1996**

The establishment of the Educational Multimedia Task Force<sup>349</sup> in 1995 is evidence of the Commission's commitment to developing the European market for educational multi-media, whatever about its concerns with ODL. The purpose of the Task Force, comprising representatives from six Community programmes (R & D programmes in Information Technology, the Telematics Applications Programme, the Targeted Socio-Economic Research Programme, the implementation programme TEN-Telecom, and the education and training programmes, Socrates and Leonardo da Vinci) was to analyse multi-media in Europe and to stimulate the use of multimedia in the educational system. The Task Force issued a 'Joint Call for proposals' in December 1996. The call generated 800 pre-proposals involving over 4,000 companies and institutions. Of the 46 successful projects (involving 425 organisations, with average Community funding of 1 MECU), two thirds involved the use of ICTs in education however, no distance teaching universities were involved in leading any of the projects (Belisle, et al., 2001; CEC, 1999a). Universities comprised just over one quarter (26%) of participants, while schools made up another 26%, with the other participants comprising private companies (Belisle, et al., 2001: 6). There was disappointment at the 'scarce participation of universities as final users of Educational Multimedia Task force projects'; this led to the inclusion of an action line 'The flexible university' in the IST programme of the Sixth Framework to encourage more university involvement (Belisle, et al., 2001: iv). The programme evaluation concluded that it had 'permanently contributed to changing the educational multimedia research agenda' and influenced the focus of Socrates II and the Information Society Technologies programme through 'bringing forth information and communications technologies as necessary components of a lifelong learning approach to education and training' (Belisle, et al., 2001: iv). Despite this, there were concerns about sustainability of the project outcomes. Interestingly, the evaluators recommended that trans-European networks such as European Schoolnet (one of the projects funded by the Call), EADTU and EUN should be used to ensure sustainability by disseminating the results, and contributing to their exploitation; they should develop 'regional one-stop-shop multimedia products dissemination strategies and portal services' (Belisle, et al., 2001: 42).

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<sup>348</sup> Interviews with Commission Officials

<sup>349</sup> Education Council – Adoption of resolution on educational multimedia software OJ C195 6 July 1996; Report from Multimedia Taskforce (SEC(96)1426; publication of Joint Call OJ 17 December 1996.



#### 8.2.14 THE eLEARNING INITIATIVE

Following the Lisbon Council meeting in March 2000, the Commission prepared the eLearning Action plan which was adopted in March 2001.<sup>350</sup> Originally, the elearning initiative was intended as a 'synergy' action, building on existing programmes without a separate budget line, however the European Parliament voted a specific budget to 'explore and foster the development of elearning in Europe' (Gutierrez-Diaz, 2003: 28). This plan defined four priority areas for 2002-2004: virtual models for European universities; financing ICT equipment and use for schools, pupils and teachers; new learning environments for school and universities; and cultural institutions as new learning environments. Maruja Gutierrez Head of the Multi-Media Unit in DG Education and Culture describes the new implementation philosophy with respect to the elearning action, as being 'more dynamic, open and flexible than traditional programmes' (Gutierrez-Diaz, 2003: 27).

In the first two calls for proposals, the main priorities were virtual universities, new learning environments and teacher training (Gutierrez-Diaz, 2003: 28). Sixteen projects were selected in 2002 aimed at examining media literacy and the impact of new technologies in a range of formal and non-formal settings, including schools, communities, companies as well as universities.<sup>351</sup> Seven higher education projects were selected in the first round: six covered models for cooperation, and the seventh constituted an observatory for elearning in Europe (Gutierrez-Diaz, 2003: 28). The third call for proposals in 2003 resulted in funding for 13 Media Literacy projects and 31 elearning support actions (peer reviews; networks of collaboration; observatories including: policy and practice in ICT; open source software, elearning in management education; elearning for social workers; teachers professional development; collaborative learning; copyright and accreditation).<sup>352</sup>

The mid-term evaluation of the 46 projects funded between 2001 and 2002, stressed that elearning was now starting to become mainstream in the education and training systems in Europe; it suggested that the Community should switch the focus from infrastructure and equipment, and pilot projects, to networking to support improvements in 'pedagogy, content, quality assurance and standards, teacher/trainer training and continuous development, organisational change and the transformation of education and training processes'.<sup>353</sup>

The Commission set up an 'eLearning Focus Group on Higher Education' comprising ten experts (including the Secretary General of EADTU, Piet Henderikx) to advise on strategies for the future.<sup>354</sup> The group recommended the linking of elearning with the Bologna process; the 2004 call for proposals specifically mentioned as one of the areas to be addressed 'the development of new organisational models for providing higher education in Europe (virtual campuses) and for European exchange and sharing schemes (virtual mobility), building on existing European frameworks (Erasmus programme, Bologna process) and providing an 'e-

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<sup>350</sup> 2001 COM(2001) 172 Final 'The elearning action plan – designing tomorrow's education' Brussels 28 March 2001.

<sup>351</sup> 2003 Commission Staff Working Paper eLearning: Designing tomorrow's education: a mid-term report as requested by the Council Resolution of 13 July 2001 SEC(2003)905 Brussels 30 July 2003. p6.

<sup>352</sup> Call for proposals: elearning programme DG EAC/26/04 Brussels 20 April 2004 p3

<sup>353</sup> 2003 Commission Staff Working Paper eLearning: Designing tomorrow's education: a mid-term report as requested by the Council Resolution of 13 July 2001 SEC(2003)905 Brussels 30 July 2003. p13.

<sup>354</sup> eLearning Focus Group on Higher Education: Minutes of the Meeting Held in Brussels on 4 March 2004 (unpublished Commission document).



learning dimension’ to their operational tools (ECTS, European Masters, quality assurance, mobility)<sup>355</sup>.

The group considered that the pilot projects funded under existing programmes had some good points, but that the short-term duration of projects prevented the effective development and dissemination of outcomes. It was considered that any future action should continue to promote pilot projects, but that these must be supported by accompanying actions designed to disseminate information and good practice, as well as to support actors at local, regional and national levels. Support for networks of experts in elearning as well as technical support structures should also be funded. It is clear that some of these insights have fed into the final shape of the elearning initiative.

Following what was regarded as the success of the exploratory action, the European Parliament called for a separate elearning action programme (Gutierrez-Diaz, 2003: 28). At the end of 2003 the European Parliament and Council adopted the *eLearning Action Programme 2004-2006*<sup>356</sup> ‘for the improvement of the quality and accessibility of European education and training systems through the effective use of information and communication technologies.’ (CEC, 2003a). The specific areas of intervention include promoting digital literacy ‘in particular for those who, owing to their geographical location, social situation or special needs do not have easy access to these technologies’; European virtual campuses with a view ‘to better integration of the virtual dimension in higher education to encourage the development of new organisational models for virtual campuses and for virtual mobility’; etwinning of schools and training of teachers; transversal actions (studies, conferences, monitoring actions). The budget will be €44 million over 3 years (10% - €4.4m for digital literacy; 30% - €13.2m for virtual campuses; 45% - €19.8m for etwinning; 7.5% - €3.3m for transversal actions). The Commission launched its call for proposals under the elearning programme in April 2004, defining elearning as ‘the use of new multimedia technologies and the Internet to improve the quality of learning by facilitating access to resources and services as well as remote exchanges and collaboration’.<sup>357</sup> Given the history of the Commission’s action programmes it is interesting to speculate on the evaluation of this initiative to see if anything has been learnt from the criticisms of previous programmes: short-term projects lacking focus and sustainability; too much focus on technology, not enough on pedagogy or on student needs; insufficient funding; overly complex administrative and financial requirements.

### **8.2.15 LEONARDO DA VINCI 1995-2006**

The Leonardo da Vinci programme (1995-1999)<sup>358</sup> streamlined the former COMETT, EUROTECNET, FORCE, PETRA and IRIS programmes into one programme. Leonardo was designed to complement research policy measures such as distance and open learning through DELTA ‘the teaching/learning arm of the EU’s research and development programme (Nihoul, 1999: 156). Its focus is largely on vocational training. It is interesting to note that ECOSOC expressed reservations about the limited definition of ODL and training in the Leonardo decision which

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<sup>355</sup> Call for proposals: elearning programme DG EAC/26/04 Brussels 20 April 2004 p2.

<sup>356</sup> Decision No 2318/2003/EC of the European Parliament and of the Council of 5 December 2003 adopting a multiannual programme (2004 to 2006) for the effective integration of information and communication technologies (ICT) in education and training systems in Europe (*eLearning Programme*). OJ L345/9 31 December 2003.

<sup>357</sup> Commission Call for Proposals: *eLearning Programme* DGEAC/26/04 Brussels.

<sup>358</sup> Council Decision of 6 December 1994 OJ L 340 29 December 1994.

excludes the traditional correspondence course which consists of a combination of written work material, a correction service and possibly direct instruction. This does not seem right, especially as the EEC treaty does not impose this restriction.<sup>359</sup>

Leonardo I funded a number of projects using distance learning methodologies; twelve of these were profiled in a document on 'good practices' published by the Commission (CEC, 2002b). This writer of this document demonstrates a rather more liberal and inclusive definition of distance learning:

E-learning, the new method of distance learning using NICTs particularly the Internet, will radically change the way we work, live and learn by opening up access for everyone to information around the clock and from any location. The concept of distance learning which predates that of e-learning, also fits in with the good training practices in the first phase of the Leonardo da Vinci programme. Multimedia tools such as CD-ROMs, are currently used more in this connection than the Internet...The new technologies should be used to support creative training and self-training, taking advantage of the three major aspects of open learning: temporal, spatial and methodological flexibility (CEC, 2002b: 3)

The Council established the second phase of Leonardo da Vinci (2000-2006) in 1999.<sup>360</sup> The three objectives are to improve skills and competences of people in all levels of vocational education and training; improve the quality of and access to continuing vocational training and the lifelong acquisition of skills and competences; and reinforce the contribution of vocational education and training to the process of innovation, with a view to improving competitiveness and entrepreneurship. While there was no specific action line for ODL, Leonardo funds pilot projects to

develop and transfer innovation and quality in vocational training including actions aiming at the use of ICT in vocational training, including supporting the development of transnational open and distance vocational training networks through the use of ICT (multimedia products, web sites, network transmission etc). Such projects will have funding at 75% to a ceiling of €300,000 per year.<sup>361</sup>

The Council Decision returns to the rather narrow definition of open and distance vocational training which is defined as 'the use of ICT techniques and services in traditional or modern form and support in the form of individualised advice and mentoring'. The interim evaluation of Leonardo II<sup>362</sup> reported that 825 pilot projects involving more than 8,000 organisations had been supported in the four years 2000-2003 (representing a financial commitment of €271 million). Universities had been involved in 19% of projects as 'project promoters' and participants in a further 16%.

The evaluation of the 149 projects in the general area of ICTs and elearning carried out by independent experts is interesting in that the familiar theme of technology push emerges with 56% of projects being described as 'technology driven' (Attwell, et al., 2003). The evaluators conclude

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<sup>359</sup> Mr Nierhaus Rapporteur Opinion of the Economic and Social Committee on the Proposal for a Council Decision establishing an action programme for the implementation of a European Community vocational training policy (Leonardo da Vinci) COM(93) 686 Final –SYN 494) SOC/269 23 March 1994.

<sup>360</sup> 1999/383/EC Council Decision of 26 April 1999 establishing the second phase of the Community vocational training action programme 'Leonardo da Vinci' L 146 11 June 1999 pp33-47.

<sup>361</sup> Ibid.

<sup>362</sup> Report from the Commission: Interim report on the implementation of the second phase of the Leonardo da Vinci programme (2000-2006) Com(2004) 152 Final Brussels 8 March 2004.

to say it more bluntly: too many of the projects started through a fascination with the possibilities of the new technology and not because of their enthusiasm in designing innovative pedagogical processes based on a clear understanding of the learners' needs (Attwell, et al., 2003: 25).

Indeed, the authors characterise many project groups as completely lacking in educational expertise (Attwell, et al., 2003: 33), while in many projects the target group was not involved in developing the project (Attwell, et al., 2003: 35). Among the other criticisms of the projects was the disappearance of the teacher/trainer role, replaced by a focus on technology and self-directed learners leading to a neglect of the need to train teachers and trainers (as well as learners) in the new learning environments; continuing problems of access for poorer and disadvantaged groups; the lack of effective evaluation mechanisms; the top heavy management and bureaucratic structures especially with regard to managing large partnerships which sapped the energy for working on more pedagogically innovative aspects. (Attwell, et al., 2003). The authors make ten recommendations for future programmes: clear definition of what elearning is and is not; focus on learner orientation; inclusion of a learning philosophy; recognition of the need to train teachers and trainers; focus on pedagogy in the design and development of programmes; include evaluation as a key task; expand elearning to new target groups (beyond the traditional technology, business and language sectors); refine partnership requirements to reduce expenditure of energy on managing large partnerships while ensuring synergy between partners; concentrate on ensuring sustainability and dissemination; and use of open source software and standards (Attwell, et al., 2003). These are all familiar criticisms of the defects of the programmes which have gone before.

## **8.2.16 RESEARCH AND DEVELOPMENT FRAMEWORK PROGRAMMES**

A recurring theme in interviews was the fact that other areas of the Commission provided significantly more generous support for ODL than the unit charged with 'encouraging the development of distance education'. In particular the funding under the Research and Development Framework programmes coordinated by the former DGXIII now DG Information Society (INFSO) was far in excess of that available under Socrates or Leonardo. The framework programmes replaced the earlier research and training programmes linked with EURATOM between 1958-1976 (Brine, 2000). The DELTA exploratory action was funded under the Second Framework 1987-1991. The Third Framework 1990-1994 priorities included the need to increase competitiveness, to improve the quality of life and to cope with the changing scientific environment (Rosello, 1993b: 19). The follow up DELTA programme was funded under the Third Framework under Action Line 1-c 'Telematics systems in areas of general interest', the goal of which was to 'pave the way via incremental R&D for the implementation of these services in health care, transportation and education, amongst other areas' (Rosello, 1993b: 19). The Fourth Framework 1994-1998 priorities were heavily influenced by concerns with the Information Society and included 19 specific actions, including the Targeted Socio-Economic Research Programme (TSER) and the Telematics Application Programme (TAP) which were to form part of the Multimedia Joint Action call in 1996. The second TSER call in October 1996 generated 310 proposals of which 13 in the area of educational research were successful; of these three were related to the new technologies in education (Brine, 2000). Brine comments that the programme was not concerned with

improving education practice or understanding educational processes per se, but was focused on [education and training] in relation to the European project, to the construction of the EU, to its economic growth, its global competitiveness and its social cohesion, and it was here at the interface of such concerns that education researchers were needed (Brine, 2000).

Brine comments that the implications of societal development for the education and training system ‘seem shockingly under-represented’ in the projects selected (Brine, 2000).

According to Rosello, the Fifth Framework 1999-2003 was ‘the technological answer of the European Commission to the new challenges of the knowledge society’ (Rosello, 2002: 14). The Fifth Framework:

should aim at providing the EU with a blueprint for a seamless and cost-effective implementation of advanced technologies for enhancing education and training systems. This work would focus on the common needs of different teaching and learning process as on new approaches to lifelong learning, and on innovative ways of integrating multimedia pedagogic material (quoted in Rosello, 2002: 16).

One of the actions of the Fifth Framework was designed to tackle the recognised obstacles to innovation and dissemination of the advanced learning technologies in Europe (linguistic, cultural, educational and organisational) (Field, 1998: 183). Action 1: the User Friendly Information Society had a budget of €3.6bn and included actions on education and training: improving the learning process; developing high quality learning material; broadening access to learning resources and services; and human language technologies.

ECOSOC in its opinion<sup>363</sup> on the Fifth Framework expressed a utilitarian view of the role of education and training, pointing to the shortage of skills and the over-emphasis on the humanities at the expense of physics, mathematics and engineering; however the Committee saw an opportunity for ‘remote learning institutions’ in meeting the need for new skills, although showing an alarming lack of insight into the organisational reality of these institutions

They can change their programmes almost over night; there is no limit on [the] number of students. The education and training programmes can easily be made adaptive to each student for maximum efficiency. The resulting qualifications should be accredited in all Member States.<sup>364</sup>

A number of priorities for the Sixth Framework programme<sup>365</sup> cover the impact of ICT in education as well as the social and societal impact (Gutierrez-Diaz, 2003: 27). Among the six thematic areas identified, the Information Society Technologies (IST) theme is of most relevance to distance learning. A total of €3.625 billion was allocated to IST out of a programme fund of €12.905 billion. The programme aims to integrate research in Europe through the use of integrated projects (IPs) and networks of excellence (NoEs). The IST thematic priority was designed to ‘contribute directly to realising European policies for the knowledge society as agreed at the Lisbon European Council...and reflected in the eEurope Action Plan.’<sup>366</sup> The decision identifies five research priorities in the IST action: applied IST research addressing major societal and economic challenges; communication, computing and software technologies; components and microsystems; knowledge and interface technologies; and IST future and emerging technologies. The key action in the IST programme is the Technology Enhanced Learning action, with the objective to

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<sup>363</sup> ECOSOC Opinion of the Economic and Social Committee on the Fifth Framework programme for Research and Technological Development (1998—2002).CES 1140/98 10 September 1998 p3.

<sup>364</sup> Ibid. p5

<sup>365</sup> Council Decision of 30 September 2002 adopting a specific programme for research, technological development and demonstration: ‘Integrating and strengthening the European Research Area (2002-2006) OJ L294 29 October 2002

<sup>366</sup> Ibid. p12.

develop technologies to empower individuals and organisations to build competencies to exploit the opportunities of tomorrow's knowledge society. This is achieved by focusing on the improvement of the learning process for individuals and organisations, and of the intertwined learning process between individuals and organisations.

In a familiar critique of the technocentric approach of EU programmes, the Working Party on Education and Training, established by the IST Committee recommended that 'future research into Technology Enhanced Learning (eLearning) should be based on a user-centred, integrated approach that recognises the inseparability of pedagogy, organisation, applications and technology'.<sup>367</sup> The Working Party recommended that five issues be tackled: 1) pedagogical and organisational frameworks; 2) elearning for all; 3) evaluation methods and technologies; 4) ambient intelligence and ubiquitous learning and standardised learning objects for personalised learning; and 5) improved metadata, semantic technologies, modular learning objects and learning object management systems.

In the first call<sup>368</sup> under the Sixth Framework IST programme, 12 projects were selected with an average budget of €6.1m, far in excess of the average budget of Minerva projects at approximately €100,000. Only two projects had involvement of distance teaching universities. Interviewees with ODL background reveal deep discontent with the Framework programmes, not least at the failure of distance teaching institutions to receive funding. One interviewee referred to the 'tragedy' that so much funding went to 'far off' projects, managed by 'dilettantes who were playing with new toys' which had no hope of being sustainable.<sup>369</sup> Another interviewee was severely critical about the selection process in the Sixth Framework, questioning the expertise of the independent evaluators who select projects which constitute just a 'new version of what we were doing fifteen years ago'.<sup>370</sup> Little of the funding is making its way to ODL institutions although interviews with Commission officials indicate that these institutions are no longer the major players in multimedia in education and training in Europe.<sup>371</sup>

### 8.3 IMPACT ON ODL

As the above outline of EU implementation programmes has shown, many billions of Euro and human efforts have been invested, ostensibly into supporting ODL in Europe over a period of twenty years between 1984 and 2004. It is not feasible within the scope of this thesis to evaluate the overall impact of these programmes on ODL however, some preliminary indications have emerged from discussions with ODL interviewees, Commission officials, reviews of the literature and personal experience. The EU implementation programmes have succeeded in privileging multimedia and technology over the traditional concerns of ODL with social cohesion; despite the substantial investment there is little evidence that any sustainable results have been achieved over the last twenty years. Nevertheless, as the case studies of TOPCLASS and Oscail below will demonstrate, sustainability can be measured in many ways and perhaps more research is needed at an institutional level to measure the real impact of the EU's programmes. This section starts with an exploration of the reasons why organisations and individuals have participated in EU programmes before looking at the characteristics of these programmes in terms of technology, funding and sustainability.

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<sup>367</sup> Communiqué on priorities for research and development work on Technology Enhanced Learning (eLearning) in the Sixth Framework programme as recommended by the ISTC's Working Party on Education and Training 17 October 2001 <http://www.proacte.com>.

<sup>368</sup> Information Society Technologies <http://www.cordis.lu/ist> accessed 25 March 2004.

<sup>369</sup> Michael Foley Interview 27 April 2004.

<sup>370</sup> Claudio Dondi Interview 20 May 2004.

<sup>371</sup> Commission Official, Interview 1 April 2004.



### 8.3.1 WHY PARTICIPATE?

Despite almost twenty years of EU implementation programmes, there has been little change in the factors which both attracted and obstructed participation in implementation programmes. In 1989, Cerych summarised the benefits of the programmes as: providing recognition, seed money with a powerful mobilising and multiplier effect, and finally 'free money' in the context of often tight University budgets (Cerych, 1989: 330). Lockwood's (1989: 414) plea 'please give us some more money with fewer strings' still resonates. Bates very presciently predicted with regard to the COMETT, DELTA, DEUCE, LINGUA, ESPRIT, RACE and ERASMUS programmes, that

The importance of these programmes cannot be too strongly emphasised. They provide much needed resources for educational institutions under strong financial pressure from their own governments, and provide opportunities for trans-border activities which otherwise would not exist. They are a marvellous stimulus to innovation and technological development for learning and teaching. But they also have their dangers as well as benefits for EADTU institutions. Although support for EADTU activities has been heartening to date, we have no exclusive claim to these funds for distance teaching activities. If we do not meet the criteria - or even if we do - other institutions whom we may see as hitherto insignificant players in the distance education game are also eligible for funding. Furthermore, the policy and agenda either explicit or implicit in the EC's programmes are not always in harmony with the policies and agenda of individual EADTU institutions (Bates, 1990b: 17).

Discussion with interviewees and analysis of the literature have indicated that individuals and organisations derive a number of advantages from participation in EU funded projects; however there are push and pull factors at play which ultimately affect the take up of particular projects and which explain the mix of institutions participating at any one time. The factors mentioned by interviewees relating to involvement with the EU's ODL programmes included: money, learning, organisational and personal factors, the European dimension, and the selection process.

Money is often cited as the main attraction of project involvement. Particularly for financially weak organisations, the prospect of acquiring new equipment, staffing or courseware is attractive. However, most projects require matching funds from the institution, which is expected to contribute anything between 10% and 50% of the budget. This can result in some organisations overstressing themselves and running into financial difficulties, as happened in the early 1990s with a range of networks which relied excessively on project income, without having a stable source of additional income. Some larger scale organisations such as the Open Universities have tended to favour involvement in the more generously funded Framework programmes.

The Commission has been criticised by participants on many occasions for the excessive financial controls and reporting requirements, in comparison with the considerably lighter scrutiny on the project outcomes. Some organisations found the COMETT conditions to be unduly onerous. For example, the UKOU withdrew from the European MBA project led by EADTU specifically because of COMETT conditions. The EMBA project itself encountered delays caused by COMETT conditions.<sup>372</sup> In the author's experience, following the submission of a series of reports and dissemination outputs from the Minerva funded PICTURE project<sup>373</sup>, the only feedback received from the Technical Assistance Office was a

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<sup>372</sup> Axel Baecker EMBA project coordinator EADTU *News* 8 September 1991 p18.

<sup>373</sup> See <http://www.oscail.ie/academic/picture.php>.

request to justify expenditure on catering at two meetings, and the pay rates for two participants on the project. No feedback other than an acknowledgement was received in respect of the outputs of the programme. This is typical of the way Minerva and ODL outputs and deliverables are processed. The SUSTAIN project attempted to evaluate the sustainability of ODL and Minerva projects but found that there was no system or staff for logging outputs onto a database, and for assessing the quality of the projects.<sup>374</sup> Even the recent elearning initiative encountered frustration with late signing of contracts.<sup>375</sup> It is suggested that more attention will be paid to the quality of outputs in the next generation of programmes and steps have been taken by the Commission to lighten the financial reporting requirements in the case of relatively small sums of money.<sup>376</sup> One major problem is that despite the perceptions of a large bureaucracy in Brussels, the units dealing with any one area tend to have a very small number of staff, insufficient to cope with the volume of work.

The prospect of learning about new methods and approaches, and developing skills and expertise in a transnational context is also a pull factor in involvement. Organisations and individuals can assess the viability of new approaches on a pilot basis without necessarily committing themselves in advance. However, after a certain stage, if nothing new is being learnt and project ideas are being recycled among different programmes, the attraction lessens. Organisations can attain prestige as players in the European stage, generating allies and support at local as well as European level. However, there are diminishing returns for high prestige organisations which find that they are not gaining from their participation while others are perhaps ‘piggybacking’ on their expertise (i.e. providing support to potential competitors). Other organisations may find that involvement in projects has a negative impact on the core business, with key staff ‘distracted’ by the demands of project activities and deadlines echoing Bates prediction

I fear that the availability of European funds is actually distracting staff in our institutions from implementing technological developments nationally that would be of more direct benefit to our students (Bates, 1990b: 17).

Nevertheless, projects can have an impact on an organisation; for example, the Department of European Studies in the University of Aarhus was established as a result of the university’s involvement in the ERASMUS supported ‘What is Europe’ course initiative led by EADTU.<sup>377</sup>

It is clear that many individuals have benefited enormously from participation in European projects: broadening their horizons, enhancing their expertise in teaching and research, and project management skills. On the other hand, individuals can withdraw from project participation due to burn out; often project work is additional to the normal workload in the home organisation; circumstances change and people get tired of travelling and attending two day meetings at weekends in various European centres. Nevertheless, over the years a relatively informal network of individuals active in ODL at European level has grown significantly. Analysis of the participants in the annual EDEN and EADTU conferences will reveal a core of individuals who consistently present papers, participate in projects, and

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<sup>374</sup> Elisa Mancinelli Interview 25 September 2003.

<sup>375</sup> 2003 Commission Staff Working Paper eLearning: Designing tomorrow’s education: a mid-term report as requested by the Council Resolution of 13 July 2001 SEC(2003) 905 Brussels 30 July 2003. p25.

<sup>376</sup> Proposal for a decision of the European Parliament and of the Council amending Decision No 253/2000/EC establishing the second phase of the Community Action programme in the field of education ‘Socrates’ COM(2002)193 Final Brussels 29 April 2002 (to amend the financial reporting procedure for COMENIUS and GRUNDTVIG).

<sup>377</sup> Joergen Bang Interview 19 May 2004.

generally network in the European ODL arena. Thus it could be said that EU support has assisted in the generation of a European ODL Space. This is perhaps part of the phenomenon arising from the EU's promotion of network formation as a means of achieving its goals in education as described by Teichler

After some period, the multitude of trans-national networks could de-nationalize curricula and the curricular map of Europe would not anymore be comprised by nations but rather by an abundance of cooperating networks...It cannot be clearly confirmed whether the European Commission pursues such a policy deliberately (Teichler, 1998: 79).

Many of the informal networks set up specifically to access EU funding do not survive the end of the project period. Some may have fulfilled their original purpose, whereas in others, the end of funding means that project teams are dispersed. However, some networks display a certain longevity, being able to tap into a combination of funding sources to support and develop their activities, thus managing to avoid the problems caused by short fixed term projects. One such example is the network involved in the Socrates ODL funded CEFES project which created a virtual forum in European Studies. This network traces its origins to the EADTU Humanities Programme Committee established in 1988 which involved representatives from the UKOU, DIFF in Germany, U Aberta in Portugal, UNED in Spain, Oscail, the Danish Open University and various other individuals from time to time. The Humanities feasibility study was funded under ERASMUS and led to the development of the transnational 'What is Europe Course' which was taken by students in a range of institutions in Europe in the early 1990s. Socrates ODL funding was used to support the development of a model for a transnational forum on issues related to European Studies, linking students and tutors in five countries between 1997 and 1999. The network received funding under Minerva for the CEFES 2000 project designed to disseminate a new model of virtual seminars using computer conferencing.

The European dimension provides exposure to a wider network of expertise and new cultural experiences. However, working in transnational multi-partnership projects can have drawbacks with regard to cultural misunderstandings as well as conflicts where partners are not pulling their weight equally. The quality of outputs can be diminished where energy has been diverted into managing the transnational element of the partnership. This problem is acknowledged and future generation programmes may alter the terms of projects, so that more funding may be available for pilot projects within a national context; with a second tier involving sharing of experiences on a trans European basis.<sup>378</sup>

One final factor which may be serving to deter ODL institutions from bidding for project funding is a feeling that the selection process is biased in favour of high-technology speculative developments and there is little interest in funding testing of more accessible technologies and approaches. There is a suggestion that some project ideas are recycled and that there is a lack of awareness of the outcomes of previous projects, leading to reinventing wheels. There is also the problem of relatively low success rates in comparison with the level of effort expended in preparing proposals.

As mentioned above, the involvement of ODL institutions in the Minerva action has declined markedly since the late 1990s. It is interesting to speculate on how the declining participation of ODL institutions has affected or perhaps reflects, the way in which the Commission views the future of ODL. When questioned about the reduction in participation

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<sup>378</sup> Maruha Gutierrez Interview 17 May 2004.

of ODL institutions, one interviewee commented that this was perhaps a sign of success in that ODL institutions no longer need targeted programmes. These organisations already have networks of contacts; there is too much work in preparing bids with low success rates and too little reward, for activities which meet the Commission's objectives, but not necessarily those of the institution. There is also evidence of a shift in focus to schools and traditional on-campus institutions on the part of the Commission and the evaluators. Table 8.2 summarises the push and pull factors which emerged from discussion with representatives from ODL networks, project participants and Commission officials.

**Table 8.2: Participation In Implementation Projects: Push And Pull Factors**

Factors	Push	Pull
Money	New equipment, staff, courses (especially financially weak organisations)	Matching funds Excessive accounting requirements & fear of auditing Rigid rules on variations in budget headings Pilot projects cease when funding stops; lack of sustainability
Learning	New expertise and skills Test out and evaluate new methods Increased research opportunities Evaluate strategic directions	Lack of cumulative learning from projects; Recycling the same projects & reinventing wheels No feedback on project outcomes; more attention by Commission to financial report than to outcome
Organisational	Prestige for organisation in Europe and at local level 'a player in Europe' Promoting support at local level Observe what works and what doesn't	Diminishing returns for high prestige organisations Difficulties in managing multi-partner transnational projects Negative impact on core business Dissonance between institutional needs and programme requirements Difficult to implement learning in the institution
Personal	Broadens horizons Prestige in organisation Promotion Opportunities for personal development	Reliance on voluntary staff involvement Burn-out; excessive workloads due to project involvement
European dimension	Travel to European destinations International experience: meeting colleagues in other countries/making contacts Development of European consciousness	Language differences Cultural misunderstandings Unequal contributions from partners Travel burnout
Selection process		High investment in project preparation; low success rate Feeling that project selection biased to non-ODL, high tech speculative projects; lack of knowledge of previous projects

### 8.3.2 TECHNOLOGY OR PEDAGOGY?

The Commission has frequently been accused of adopting a technocratic approach in its programmes (e.g. Bates, 1990b; Mason, 1999; Radaelli, 1999). Bates complained about the strong technological push in Commission programmes, when there are many obstacles to

effective distance learning which do not require technological solutions e.g. credit transfer (Bates, 1990b: 17). Despite the rhetoric in Commission documents on the need to improve pedagogy, the general consensus among those interviewed, both in the Commission and in the ODL arena was that technology predominated in EU ODL initiatives. Projects addressing issues affecting distance learning pedagogy, such as assessment, interaction in face-to-face tutorials, improving retention rates, learner preferences, joint course development, are funded only if the proposal can prove that the approach is 'innovative', i.e. it uses some form of computer-based technology. This can lead to the result described by Mason (1999: 88):

It is well known that funding initiatives by government, whether local or pan-European, may be necessary, but are certainly not sufficient to establish technology-based teaching. The rush for funding and the nature of the funding limitations (e.g. necessity of collaborative projects, reporting and accounting procedures, project outcomes stated in the bid outline etc) tend to facilitate stitched-together projects and funding dependency. They are not the stuff of long-term sustainable initiatives that build allegiances from the grass roots.

Some interviewees were optimistic that the focus in the new elearning initiative will take pedagogy into account, for example, improving collaborative learning using ICTs. Nevertheless, one interviewee interpreted the Commission's use of the pedagogical rhetoric, to mean the methodology of using technology in ODL, rather than more fundamental issues such as how students should learn.

### **8.3.3 FUNDING LEVELS**

The ODL/Minerva programmes were the subject of stringent criticism because of the low level of funding available compared with the high overhead involved in management and administration. The R&D programmes under DGINFOS have far greater funding than the education programmes. For example, the budgets for the eight Technology Enhanced Learning projects selected under the 2004 Sixth Framework call ranged from €600k to €9 million<sup>379</sup>, compared with a range of €100k to €760k for the 2003 round of Minerva projects.<sup>380</sup> Although whether this is an argument to drop the smaller, less technology focused projects is debatable. Some interviewees were of the opinion that money wasn't the problem in one sense; selection and identification of sustainable projects was much more important.

### **8.3.4 SUSTAINABILITY**

Lack of sustainability has been a constant criticism of EU projects. In many cases, good projects have disappeared when funding stopped. However, there is a problem in evaluating the contribution of EU implementation programmes to sustainable innovations, since it is probably fair to say that no in-depth long-term study has ever been carried out, and what evidence there is, is based on anecdotal evidence. Measures of sustainability taken when a project has just ended may be misleading and it is often only after a number of years that the long-term outcomes can be judged. This issue will be considered in greater detail below.

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<sup>379</sup> [http://www.cordis.lu/ist/directorate\\_e/telearn/fp6](http://www.cordis.lu/ist/directorate_e/telearn/fp6)

<sup>380</sup> Socrates Compendium 2003 Minerva.  
[http://europa.eu.int/comm/education/programmes/Socrates/minerva/resour\\_en.html](http://europa.eu.int/comm/education/programmes/Socrates/minerva/resour_en.html)



## 8.4 CASE STUDIES OF IMPLEMENTATION

In view of the difficulty in obtaining more global evaluations of the impact of the EU's ODL programmes, two case studies of implementation within an organisation were carried out. The first traces the impact of one project which led to the establishment of Topclass, a virtual learning environment used by two million corporate employees throughout the world; the second focuses on the cumulative impact of EU funded projects on the work of Oscale, the National Distance Education Centre in Dublin.

### 8.4.1 IMPLEMENTATION CASE STUDY I: TOPCLASS

The development of the TOPCLASS learning environment provides an interesting case study of the inadequacies of short-term evaluations of project outcomes. The TOPCLASS learning environment received seed funding under the DELTA exploratory action, but required substantial further development before it emerged as a leading piece of software supporting in-company training throughout the world. The following is an account of the development of this project by Henry McLoughlin<sup>381</sup> the project coordinator:

*The initial work was carried out under the DELTA exploratory action programme. The project was called ACES and it ran from 1 March 1989 to 1 March 1991. There were four partners, University College Dublin (UCD), Logica, Courseware Europe and University of Ulster Jordanstown (UJ). At the end of the project it seemed rather unlikely that we could commercialise the results so the partners agreed each of us was free to use the results in any way we wanted.*

*Two of the partners UCD and UJ formed a consortium for a project in the main DELTA programme the following year called EAST (Educational Access and Support Tools). This was a three year project in which we integrated some of the components developed in ACES and ran a number of field evaluations. This was very much a development project rather than a research one; the actual ideas had been generated by ACES. At the end of this project the partners looked at how we could exploit what we had done but concluded that it would cost too much and we abandoned the idea.*

*The major problem at this time was that to develop our work into a useful system we would have had to put a lot of effort into building the client/server to underlie the whole thing. This would have been a major undertaking and we simply didn't have the resources.*

*So we left the idea lie for a few years. Then, in 1995 a graduate student of mine ... introduced me to this new technology called the World Wide Web. After a few months playing with it, I realized that this was the client server architecture that I needed and together with another researcher of mine ... we built the first prototype called WEST (Web Educational Support Tool).*

*We founded a company to develop and market the system. Originally the company was called WEST but we soon changed it to WBTSystems and we renamed the product TOPCLASS.*

*WBT was a campus based company but it moved off campus in 1996 and it continues to develop and sell TOPCLASS. [the graduate student and the researcher] chose to move into the company full time and I chose to remain in academia.*

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<sup>381</sup> Henry McLoughlin, personal communication to Kay Mac Keogh by email 29 April 2004

Some two million users were using TOPCLASS worldwide in 2004, and WBTSytems was awarded the ICT ‘Company of the Year’ award in April 2004.<sup>382</sup> This is an example of seed funding for a ‘product’ produced by a traditional university; evaluation of the project at the end of the DELTA programme might have labelled the project a failure, not having produced a sustainable ‘product’ at that stage. Clearly, the product has achieved success in the commercial world for its developers; its impact on promoting access to ODL is less clear. Interestingly, the company made a strategic decision to market TOPCLASS into the corporate sector as it is too expensive for most higher education systems to afford.<sup>383</sup> The second case study reflects on the impact of EU funding on an organisation dedicated to providing distance education programmes.

#### **8.4.2 IMPLEMENTATION CASE STUDY II: OSCAIL**

Oscail – the National Distance Education Centre was established in 1982 with a brief to deliver qualifications through distance education to adult students throughout Ireland, in cooperation with the universities and other third level institutions. In 1986 when Oscail produced its first undergraduate programme in information technology, 39.8% of Irish adults had finished their education aged 15 or under; this figure was even higher in the remote rural regions and one of the primary objectives of Oscail was to provide qualifications on a second chance basis (MacKeogh, 1993). Over 3,000 students were registered with Oscail in 2004, on undergraduate programmes in information technology, humanities and nursing, as well as post-graduate programmes in management, information technology, and accounting. Oscail has always operated on a restricted budget; the Higher Education Authority provides a subvention of less than 30% of its income (£600,000 in 2000), while the remaining income comes from student fees, supplemented by project income.

Oscail was a founder member of EADTU, EUROPACE, SATURN, and EUROSTEP and has been a strong player in European ODL since 1987 (HEA, 2000: 14). Its restricted funding compared with its larger and more generously funded partners in Europe has meant that the only way in which Oscail can experiment with new methods is through participation in funded projects. When the first generation of implementation programmes was launched, Oscail was the target of many invitations to participate in project proposals, especially in view of its location in an Objective I region at the time. However, in view of the small number of full-time academic staff (seven in 2004) it became clear that Oscail could not take up all the opportunities on offer, without impacting on the core business of developing and delivering distance learning programmes. The strategy adopted by Oscail in project selection was quite instrumental. Projects should:

- Contribute something tangible to the main business of the organisation such as new programmes, course materials, equipment, or staffing
- Provide a testbed for new methodologies for application in existing or new programmes which Oscail could not fund out of its own resources
- Develop new expertise among the existing staff
- Contribute to the personal research interests of Oscail staff members

While travel and the European dimension of projects and institutional prestige were an added bonus, they were a luxury in an organisation with a small staff and limited finances. An analysis of Oscail’s participation in EU funded projects between 1987 and 2004 has identified at least 32 projects. It is not proposed to discuss these in detail, however, Table 8.3 summarises the main elements of these projects.

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<sup>382</sup> <http://www.wbtsystems.com/news/release/1707> accessed 29 May 2004.

<sup>383</sup> Henry McLoughlin, personal communication 30<sup>th</sup> April 2004.

**Table 8.3: Oscail Participation in EU funded projects 1987-2004**

Action	Description
<b>ERASMUS</b>	<p><b>Student Support Study Tour:</b> 1988; Study visit to investigate Student Support Systems in distance education. <i>Outcome:</i> Report on student support systems used to set up Oscail Student Support system; establishment of informal network; visits to OUUK, OUNL; UNED; U Aberta</p> <p><b>Humanities Feasibility Study</b> 1988: Project examining the feasibility of a joint humanities programme with EADTU members; <i>Outcome:</i> workshop in Milton Keynes, 1988; Contacts with network; Project went on to develop 'What is Europe' Course; no further involvement until CEFES project in 1999. <i>Partners</i> EADTU, OUNL, UUK; UNED; UAberta, JAU Denmark</p>
<b>Jean Monnet Project</b>	<p><b>Jean Monnet Modules:</b> 1990-91; 1999-2001. <i>Outcome:</i> Preparation of two distance learning modules on European Issues for the BA programme: European Migration; and European Civil Society</p>
<b>EuroFORM</b>	<p><b>Higher Education Opportunities</b> 1993-1994. <i>Outcome:</i> Preparation of modules on Mathematics, Science, Humanities &amp; IT for unemployed: Introductory Modules for distance education BA and BSc in Information technology; video editing and IT equipment. <i>Partner:</i> Ministry of Education, Belgium (French Community)</p> <p><b>IT skills for SMEs</b> 1993-1994. <i>Outcome</i> Modules on IT skills for SMEs and trainers and equipment.</p>
<b>ADAPT</b>	<p><b>PDTE: MTA</b> 1996-1997 Professional Development in Training and Education: Multimedia and Telematic Applications. <i>Outcome:</i> development of 5 course modules for teachers and trainers</p>
<b>Task Force Commission PHARE</b>	<p><b>ODL in Ireland</b> 1993. <i>Outcome:</i> Report on ODL in Ireland: Research report on the market for ODL in Ireland</p> <p><b>PHARE MCDE</b> 1995-1996 PHARE Multi-Country Cooperation in Distance Education. <i>Outcome:</i> Training the Trainers in CEE countries; workshops, online tutor training; Training programme for tutors, editors, managers of ODL; experience in transnational computer conferencing. <i>Partners:</i> EADTU; Universities from Slovakia and Czech Republic</p> <p><b>NEPOLD 1998-2000.</b> <i>Outcome:</i> Training trainers exchange of expertise; workshops; twinning of study centres; staff exchanges; development of training materials for tutors; ODL training module adapted for Oscail tutors. <i>Partners:</i> EADTU; Kosice TU; U of Paris X</p>
<b>European Training Foundation</b>	<p><b>Evaluation of the PHARE Country DE programme</b> 1999. <i>Outcome:</i> study visits to ten countries; research report; evaluation report; research material; conference papers. <i>Partners:</i> DIFF; U of Aarhus; UKOU</p> <p><b>PHARE evaluation</b> 2001: Evaluation of candidate countries readiness for eLearning; <i>Outcome:</i> Report. <i>Partners:</i> Steinbeis Foundation; UKOU; U of Aarhus</p>
<b>TEMPUS II</b>	<p><b>FLACE</b> 1996-99. Flexible and continuing education. <i>Outcome:</i> Training trainers; exchange of expertise; workshops; development of training the trainers materials. <i>Partners:</i> Kosice TU; Bratislava TU; U of Nantes</p>
<b>DELTA Exploratory Action</b>	<p><b>EIOL</b> 1989-1991. European Infrastructure for Open Learning; <i>Outcome:</i> studies of demand for open learning; telecommunications tariffs; case studies of good practice (studied Microcomputers and Accounting, and EuroPACE programme); <i>Partners:</i> SCIENTER; OUUK; IIS Greece</p>
<b>DELTA II</b>	<p><b>TRIBUNE</b> 1992-1995. <i>Outcome:</i> Horizontal project; database on other DELTA projects; dissemination of outputs. <i>Partners:</i> CODEFOC; COMNET; EADTU; FIM; Linha Verde; NOESIS; OTE; SATURN; SCIENTER; TECFA; TTL; Uniscience</p> <p><b>JANUS</b> 1992-1995. <i>Outcome:</i> Evaluating telematic networks linking centres for European Open University Network for joint course development and delivery. <i>Partners:</i> UKOU; Atena; OUNL; EADTU; FernU; GMCL; ITS; Jutland OU; Telesystemes; Touche Ross; Transcend Technology; UNED; U of Helsinki; U Politecnica Madrid</p> <p><b>SMILE</b> 1992-1995 <i>Outcome:</i> Adaptation of tools to system for delivery of learning materials and services to SMEs; network of Training Technologies Support Units. <i>Partners:</i> Silogia; ADB; + many others</p>

Action	Description
	<b>CCAM</b> 1992-1995. designed to test out options for use in EOUN structure. <i>Outcome:</i> Scenarios for creation of a European telematic Network for education and training; costing of different options. <i>Partner:</i> EADTU, EuroPace, CONDAT, IDATE
<b>DELTA Follow up study:</b>	<b>DELTA-DEMO ESC</b> 1994-1995 Project to test selected DELTA project outputs at a number of sites. <i>Outcome:</i> identified lack of sustainable outputs. <i>Partners:</i> EADTU; La Coruna ESC; Koln ESC; Vienna ESC; Brig ESC
<b>DGXIII contract</b>	<b>TET</b> Telematics for Education and Training (TET) <i>Outcome:</i> 3 studies one by NDEC on implementation scenarios for telematic services in open and distance teaching universities. <i>Partner:</i> EADTU
<b>Joint Call DGXII; DGXIII; DGXXII</b>	<b>EOUN</b> 1994-1995. Project to launch the first operational phase of EOUN (European Open University Network based on ESCs); <i>Outcome:</i> three programmes, computer science, environmental sciences, and statistics involved satellite delivered lectures, and written course materials. <i>Partner:</i> EADTU
<b>COMETT I</b>	<b>ISDN</b> 1987-1988. <i>Outcome:</i> Development of ISDN Module used on BSc in Information Technology. <i>Partners:</i> Ericsson Enterprise Ltd; L.M. Ericsson Denmark; U of Ulster; U of Twente
<b>COMETT II</b>	<b>COSTEL</b> 1990-93. <i>Outcome:</i> Course System for Telecommunicated training and innovation management; training the trainers in use of computers for telecommunications. <i>Partners:</i> Danish Technological Institute and others. <b>Transnational IT</b> 1990-1992. Transnational IT Skills for managers and trainers in SMEs. <i>Outcome:</i> development of a multimedia, distance education and training system NDEC received a number of computers from Apple Computer. <i>Partners:</i> Uninova; Apple Computer; UKOU; OMAS SA (U of Athens)_ <b>PRISM</b> 1990-1992 Peripheral Regions Infrastructure for Satellite Delivered Modules. <i>Outcome:</i> to expand local infrastructure for the support and enhancement of programmes using satellite delivery. <i>Partners:</i> UCG; Chalmers University Sweden; Swedish Telecom; Volvo; Northern Ireland Open Learning Centre
<b>COMETT II /Leonardo da Vinci</b>	<b>EMBA</b> 1992-1995. <i>Outcome:</i> Development of materials for a European MBA; 3 Modules Module on Financial Issues produced by NDEC. <i>Partners:</i> EuroPACE, EUROSTEP, SATURN; OUNL; OUUK; FernU
<b>Socrates ODL action</b>	<b>National Agency ODL Action</b> 1995-2000. <i>Outcome:</i> National Agency responsible for promoting ODL action in Ireland; Reinforcement of national role in ODL in Ireland; access to information from Commission <b>CEFES 2000</b> 1999-2000. Creating an Electronic Forum in European Studies. <i>Outcome:</i> Online virtual seminars on European studies; experience in design and evaluation of online seminars; publications; conference papers. <i>Partners:</i> DIFF, UKOU; UNED, U Aberta; U of Aarhus <b>TODL</b> 1996-1997 Telematics in open and distance learning. <i>Outcome:</i> Case studies of successful implementation of telematics in ODL Publication 'Telematics in Open and Distance Learning'. <i>Partners:</i> EADTU; FernU. <b>SE-ULDEE</b> 1999. <i>Outcome:</i> Research on six socio-economic issues related to the virtual university: political issues; socio-economic effects; distance teaching market; consumer response; economic efficiency; efficiency of new technologies. <i>Partners:</i> FernUniversitat Katholieke Universitat Leuven
<b>Socrates Thematic Networks</b>	<b>DUNE</b> 1996-1999. <i>Outcome:</i> Inventory of issues that hinder Europe wide delivery of courses and curricula; to deliver specification of rules, policies and good practices for development of common courses and curricula in a European context. <i>Partner:</i> EADTU
<b>Socrates Minerva action</b>	<b>PICTURE</b> 2000-2002. Perceptions of ICT Use in Remote Education. <i>Outcome:</i> Research on student perceptions of EU policy on ICTs; testing innovative approaches in online learning; report on the digital divide in Europe; template for structured online learning, supported by virtual seminars; research reports; publications and conference papers. <i>Partners:</i> U of Aarhus; Queens U Belfast; UKOU <b>MISSION</b> 2001-2003. <i>Outcome:</i> Project linking study centres in EU and candidate countries (based on Phare network); databases; exchange of information participation in transnational network. <i>Partners:</i> U of Miskolc, Hungary; TU Kosice; etc

In discussing the outcomes of the projects with Oscail staff it is clear that tangible outcomes were relatively few. Some course modules funded under COMETT were presented in the

BSc in Information Technology for a number of years. The compulsory introductory module for the BA programme was first tested under the EUROFORM project in 1993 and has been presented each year since then, with appropriate revisions and updating. Over 4,000 students have taken this module since 1993. This module is now being further updated, with funding from the Higher Education Authority to become the 'Student Passport to eLearning' (Lorenzi, et al., 2004). The Jean Monnet Project funded the development of modules on European Migration and Civil Society which have been presented in the BA programme. While other modules were developed (e.g. under the ADAPT programme), it proved impossible due to institutional and other factors to embed these modules into the normal programme of courses. Some projects provided significant injections of much needed computer and audio-visual equipment, however these rapidly became obsolete within two or three years.

The major benefit to Oscail from project involvement was the opportunity to experiment with and test new methodologies which Oscail could not have afforded and which allowed it to avoid many costly mistakes and journeys up technological blind alleys. One of the major concerns in Oscail was the issue of cost and cost-effectiveness in distance learning. In the early 1990s the cost of equipment and access charges was a major barrier to the use of technology in education. The EIOL project in 1991 allowed Oscail to research the cost of telecommunications tariffs in Europe. This survey found that Ireland (at 15 ecus per hour) was the most expensive at the time, compared with the least expensive tariff (3 ecus per hour) in the Netherlands. From this survey NDEC concluded that 'rather than increase access to education and training, the use of telecommunications can add further barriers to the learner's engagement in flexible learning opportunities' (MacKeogh, 1993). The CCAM study demonstrated the cost-ineffectiveness of a range of ICTs relative to traditional distance education methods.<sup>384</sup> The JANUS project concluded that due to the high costs, and inadequate infrastructure, the home-based student 'is likely to be disadvantaged technologically for the foreseeable future'.<sup>385</sup> In partnership with EUROPACE, Oscail was able to test out the viability of delivering satellite-based courses to companies around Ireland. The outcome of this experiment showed that satellite transmission at that stage was too expensive; the production values were poor; and many companies were not even geared to receiving terrestrial broadcasting, never mind satellite based broadcasting since most companies did not possess a television set.

A number of projects allowed Oscail to investigate the feasibility of various technologies with a view to identifying successful and sustainable applications which could be transferred to Oscail's programmes. Telematics and Open Distance Learning (TODL), a one-year project funded by Socrates ODL in 1996-97 aimed to prepare a series of case studies on the successful implementation of telematics in ODL, focusing on programmes which had moved beyond the pilot phase, having been presented by institutions for at least two years. It proved difficult to find programmes which met these criteria as most programmes using ICTs at that stage were still pilot, experimental programmes, not embedded in ongoing credit programmes. A survey of institutions using telematics revealed that 85% were still using printed materials as the main delivery method (Curran and Fox, 1999). From Oscail's point of view, this exercise proved a helpful antidote to the hype surrounding ICT based ODL at that stage; while there was no doubt that technology could be used to enhance ODL, its use was not as widespread as might appear, and successful application of the technologies required attention to economic, institutional and contextual factors. The project provided Oscail with some objective information on which to base its ICT strategy for the future.

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<sup>384</sup> Seamus Fox. Interview 2 July 2004.

<sup>385</sup> Unpublished paper Oscail archives



The PICTURE project, funded by the Socrates ODL action has made perhaps the most significant contribution to Oscail's presentation of courses. With increasing access to the Internet and home ownership of PCs Oscail decided in 1999 to investigate introducing third generation technologies into teaching its programmes. The PICTURE project allowed Oscail coordinators and tutors to experiment with various scenarios for online teaching using virtual learning environments (Fox and Mac Keogh, 2001; Fox and MacKeogh, 2003). Since then, the 'task oriented online learning' approach developed in this project has been applied to the undergraduate and postgraduate programmes.

Another key return on participation in projects has been the development of expertise in a broader arena and the consequent feedback into the work of the Centre. These skills include management of projects, finances, people and teams, especially in a multicultural and multilateral context. Participants have developed a deeper awareness of the European and transnational context of distance education. Experimenting with new methodologies allowed participants to develop technical skills, including video and computer conferencing, collaborative drafting and writing, video editing, web design etc. In addition, pedagogical skills were enhanced: presenting workshops, training the trainers, instructional design, and assessment. In turn, the staff of the Centre were called on to share their expertise especially in Central and Eastern Europe, which led to a steady stream of visiting academics to Dublin. With regard to developing skills however, the law of diminishing returns sets in when many projects require partners to carry out recurring 'train the trainers' projects, and write up 'state of the art' descriptions of elearning/ODL. Oscail has refused invitations to participate in projects which appear to be recycling old ideas and which create no added value for the Centre.

Participation in projects has also contributed to the research profile of the Centre. The author has published or co-published a number of papers on the outcomes of various projects (Fox and Mac Keogh, 2001; Fox and MacKeogh, 2003; Lorenzi, et al., 2004; MacKeogh, 1990; MacKeogh, 1991; MacKeogh, 1993; MacKeogh, 1999; MacKeogh, 2003; MacKeogh, 2004; MacKeogh and Baumeister, 2000). The PICTURE project has generated a number of articles, reports and conference papers,<sup>386</sup> as well as research theses (see Fox, 2001).<sup>387</sup>

Despite the careful selection of projects, it is true that not all have had successful outcomes. Some projects ran into serious difficulties and crises but managed to reach completion within the terms of the project contracts. The main problem for all staff members was in underestimating the amount of time and effort in carrying out the projects while ensuring that the core business of the Centre did not suffer.

It is interesting to note that in 2004, Oscail was not involved in any EU funded project, the first time since 1987. This was not entirely through choice since a number of bids in which Oscail was a partner under the Minerva and eLearning initiatives proved unsuccessful; on the other hand it was not a cause for concern. In summary, the impact of seventeen years of EU project involvement on Oscail, has been the development of a small number of course modules utilising a cost and educationally effective pedagogical and technological approach; a wealth of expertise in all aspects of elearning technologies combined with a healthy scepticism about the hype surrounding ICTs in education grounded in the reality of delivering real programmes to 'real students'; a network of contacts throughout Europe and beyond, and a profile in European ODL which is perhaps out of scale with its small size.

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<sup>386</sup> see <http://www.oscail.ie/academic/picture.php>.

<sup>387</sup> This project funded the survey on student attitudes to ODL reported in Chapter 10 of this thesis.

## 8.5 THE FUTURE OF ODL IN EU POLICY

The Commission embarked on an extensive public consultation exercise in November 2002 concerning the future development of the EU's education and training programmes following the completion of the Socrates and Leonardo programmes, as well as the elearning initiative in 2006.<sup>388</sup> The Commission requested responses to thirteen questions concerning the type of action to be taken, the geographical coverage and programme design and organisation. Respondents were asked to consider which actions should be retained, which dropped and which changed. Contributions were welcomed from all sources, individuals, groups, organisations and institutions and a special website was set up on which responses could be posted. The contributions to the consultation process were analysed by the Pôle Universitaire Européen and published in March 2004 (Pôle Universitaire Européen, 2004).

The Commission published its communication on the new generation of education and training programmes after 2006 on 9 March 2004.<sup>389</sup> The communication proposed a new generation of programmes, comprising an integrated programme for mobility and cooperation in lifelong learning and a new Tempus Plus programme aimed at countries outside the EU/EEA/EFTA area, especially the 'new neighbours' bordering the post 2004 enlarged community. The proposal argues for the introduction, not of harmonisation, but the removal of 'incompatibilities and incoherence' between the 25 different education and training systems in the union, if the goal of becoming the most competitive economy in the world by 2010 was to be met. The new (unnamed) action is to cover four sectors: Comenius for school level; Erasmus for university level; Leonardo da Vinci for initial and continuing vocational training; and Grundtvig for adult education. These sectoral actions are to be supported by a series of transversal programmes on policy, languages, ICT and dissemination. These new proposals are set against the context of policy developments in the previous five years, including the Lisbon process, the Concrete Objectives process (i.e. quality, access, openness); lifelong learning, the Bologna process with regard to higher education and the Copenhagen process with regard to vocational training; and the enlargement of the Union.

It is interesting to note that the Community's commitment in the Maastricht Treaty to encouraging the development of distance education had been distilled to the narrow technical focus of ICT. It was proposed that the action on ICTs would

focus on cross-cutting activities aimed at the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning. It will be implemented through multilateral projects and networks, and through other action such as observation, benchmarking and quality analysis.<sup>390</sup>

Yet, the role of elearning/ODL in facilitating virtual mobility, extending access and openness to education and training, or in improving quality is not explicitly mentioned in the descriptions of the sectoral programmes. One official confirmed that the Director General, Van der Pas had ruled out the inclusion of ODL and elearning from the proposals.<sup>391</sup> Another commission official responsible for drawing up the new proposals confirmed that 'it was quite difficult to integrate anything on ODL or elearning [into the new proposals]' but

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<sup>388</sup> DG Education and Culture 2002 The Future Development of the European Union Education, Training and Youth programmes after 2006 Brussels, November 2002.

<sup>389</sup> Communication from the Commission: the new generation of community education and training programmes after 2006 COM(2004) 156 Final Brussels 9 March 2004.

<sup>390</sup> Communication from the Commission: the new generation of community education and training programmes after 2006 COM(2004) 156 Final Brussels 9 March 2004. p18.

<sup>391</sup> Commission Official, DG Education and Culture Interview 17 May 2004.

that it would be ‘up to the Member States or the European Parliament to remedy the weaknesses’.<sup>392</sup> Whether the Members of the European Parliament in the run up to the elections in June 2004 would have the time or inclination to take such action was a moot point. The Ministers for Education welcomed the proposals on 28 May 2004, merely underlining the ‘importance of ensuring that the programmes better support policy developments at European level in education and training’.<sup>393</sup> The final form of the programme will depend on the outcome of negotiations on financial aspects in late 2004.

In each of the interviews, respondents were asked ‘Has the EU succeeded in ‘encouraging the development of distance education in Europe’ and ‘should the EU take any further role in distance education in Europe?’ It is clear that the Maastricht endorsement of distance education had pushed ODL onto the European stage, but not as far as had been expected. One interviewee found the EU had encouraged distance education, but had not provided effective support. While the EU support was grudgingly described as ‘better than nothing’, it had failed to create a critical mass in Europe. While ODL had been introduced into countries which did not have ODL institutions at the time, it was difficult to see much of an increase in participation in those countries which were already strong players in ODL. Because of the Treaty commitment, promotion of distance education was now a part of the *acquis communautaire*, forming part of the laws and regulations of the EU which must be taken on board by any new member state. However, it was difficult to conclude that this had been seriously taken on board in the older Member States.

There was definite agreement that ODL is ‘not visible’ in EU actions at this stage. Yet there was an uncertain and equivocal response to any future role for the EU in ODL. One ODL interviewee wondered if it was perhaps better for ODL to be mainstreamed and not to insist on retaining a different identity. An analogy with mining was used to interrogate the reasons for holding on to what may be an obsolete form of education. It was clear that Commission officials were in no doubt that whatever the arguments, the hierarchy within the Commission assumed that ODL and elearning were now embedded in all education sectors and no longer saw a need for a special initiative in ODL or elearning. Concerns with the exclusionary potential of ICTs despite rhetorical references, are minimal. Even proposals in the elearning initiative to promote actions aimed at tackling the digital divide had become somehow transformed into initiatives dealing with media literacy.<sup>394</sup>

Nevertheless, other ODL interviewees felt there was a need to retain a specific action. The EADTU’s response was that it was too early to drop a specific commitment to elearning as the field was insufficiently developed. There was still a lot of work in exploring new learning environments and pedagogical and institutional approaches. There were fears that these developments would be starved of funding unless there was specific commitment to ODL or elearning approaches. However, one interviewee who has acted as a project evaluator during the selection process entered a caveat to the effect that attention should be given to selecting projects that focus on improving solid, reliable technologies, rather than on selecting ‘wacky and high risk’ projects with limited prospects for adoption in the real world.

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<sup>392</sup> Commission Official, DG Education and Culture Personal Communication by email 14 March 2004.

<sup>393</sup> Council of the European Union 2585<sup>th</sup> Council Meeting Education, Youth and Culture. Brussels 27-28 May 2004 Press Release 9283/04.

<sup>394</sup> Commission Official Interview 17 May 2004.

One Commission official noted that the largest programme, ERASMUS had focused on physical mobility and that the exclusion of virtual mobility was due to an element of ‘academic snobbery’ with regard to distance education demonstrating that distance learning still retains an image problem in some quarters.<sup>395</sup> Even proposals to extend ERASMUS beyond Europe – ERASMUS Mundus, had ignored the potential of ODL.

The ODL Liaison Committee produced a set of recommendations on future EU programmes in 2002 which included going beyond one off pilot experiments which have failed to produce sustainable results; closer involvement of the ODL networks and other stakeholders in the educational sector in designing the new programmes in order to ensure they meet the policy goals and objectives; and the use of a diversity of means to encourage and facilitate creative ideas and work, rather than simply funding fewer large scale projects (ODL Liaison Committee, 2002). However, in view of the recent apparent loss of interest in the ODL Liaison Committee on the part of the Commission, it is unlikely that these suggestions would have much affect.

## **8.6 SUMMARY AND CONCLUSIONS**

The focus on the use of ICTs and their frequent conflation with ODL ignores the disparities of access to technology both within and between Member States and risks the exclusion of the traditional market for ODL programmes – those who could not attend full time education for financial, locational, occupational, domestic or personal reasons.

This chapter started with an analogy of building a bridge to solve a problem of traffic congestion. It is relatively easy to evaluate the implementation of a solution which takes a physical form; one can ask was the bridge (or the road, hospital, school) built? Did it stand up? Has the problem (traffic congestion, waiting lists, overcrowding) gone away? It is less easy to measure the more diffuse outputs of the plethora of action programmes which have funded distance learning initiatives over the years. Earlier evaluations of Socrates concluded that it was not possible to look for ‘products’ and that the best that could be hoped for was to look for evidence of processes: change, improvement, adoption of methods. It is known that the number of distance learners in the Community has increased, although the exact numbers are unknown. It is difficult to find accurate data on the numbers using elearning in training, although estimates put the figures around 12% using elearning in Ireland in 2001.<sup>396</sup> All that can be safely said is that there is more distance learning and elearning, but how much and to what extent the Community initiatives have contributed is impossible to quantify. As illustrated in the TOPCLASS case study, measurement of sustainability is fraught with difficulties when it is not clear what the products or processes produced by the programme actually were.

Another way to evaluate the effectiveness of the implementation programmes is to check if the problems have gone away, and to what extent the programmes or some other interventions were responsible. Again this process has its difficulties in terms of measurements, since the way in which problems were couched in order to justify the implementation programmes did not specify any measures or benchmarks by which effectiveness could be judged. The problems of competitiveness and employment have not gone away as the education and training system can play only a small part in shaping the global economic system. The continuity of the digital divide and unequal access to the knowledge and expertise required to participate in the new knowledge society forms an even

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<sup>395</sup> Ibid.

<sup>396</sup> Chambers of Commerce Survey of Companies in Ireland 2002.

bigger barrier to cohesion than heretofore, an issue that will be taken up in Chapter 9. The European agenda is being addressed by the ERASMUS programme, but has little impact on distance learners. Nevertheless, the sustained support for European networking activities has succeeded in generating a cohort of academics and trainers who are at ease in the European education area. Progress towards the Information Society is being made with increasing evidence of ecommerce, ehealth and egovernment, although there is still much to be done. Finally, despite the lifelong learning rhetoric, the Commission's recent programmes have focused more on young people, and appear to have lost track of the need to provide supports for those who have left the initial education and training system.

According to Prosser<sup>397</sup> and Durando, writing on the outcomes of the COMETT programme 'ambitious programmes do not encounter failure. They throw up challenges' (Prosser and Durando, 1992: 233). Despite the dearth of multimedia products and sustainable programmes emerging from the significant investment in ODL initiatives and networks since the mid 1980s, the Commission continues to operate a top down approach to implementing its ODL policy agenda, which, despite the rhetoric of cohesion and pedagogy, continues to be driven by technology (Baumeister, 1999). Despite evidence of networks influencing EU policy, as Tait (1996: 235) has pointed out 'the evidence is overwhelmingly that Commission policy and programmes dominate the relationships'. And despite the evidence of evaluations and the advice of experts, the Commission continues to develop programmes which favour technology over pedagogy, short-term projects over long-term solutions, and impose bureaucratic conditions which serve to stifle creative and effective partnerships. A perennial problem which affects Commission programmes is that no sooner has a programme started than the process of planning the next generation of programmes commences. This means that the next generation of programmes can never take into account the lessons of the previous generation since the summative evaluations are often not available until the new generation programmes have been in place for two to three years.

While a full evaluation of the outcomes of the Socrates ODL and Minerva action remains to be completed it appears that ODL institutions and students have not benefited in any significant way from Socrates or even the IST programmes. The relative lack of success in implementing sustainable ODL programmes may be ascribed to 'the increasing colonisation of education policy by economic policy imperatives' (Ball, 1998: 129). If the potential of the ICTs in education is to be realised, without further excluding the traditional audience for ODL – those who are unable to attend full-time education for locational, employment, domestic or personal circumstances – more attention must be given to questions of accessibility, and pedagogical and cost-effectiveness. In 2004, over one million students were taking ODL programmes in Europe, most of whom were using accessible media including print and email. There is evidence that outside of the EU supported context national systems are exploring the potential of ICTs in both ODL and conventional education. The EU programmes may be effective in disseminating ideas and exposure to innovative approaches and for increasing awareness of the European dimension, however, in the absence of serious infrastructural support and investment in the ICTs, it is unlikely that ODL, as defined by the EU, will play a major role in supporting European competitiveness and promoting social cohesion. The digital divide represents a major obstacle to achieving the EU's policies on elearning. The next chapter will examine the issue of national responses to the Information Society and the extent to which the digital divide poses a barrier to greater involvement in elearning in Europe.

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<sup>397</sup> Prosser was a former official in the COMETT office.



## **Chapter 9: Tackling the Digital Divide: National Strategies**

### **9.1 INTRODUCTION**

As has been shown in previous chapters ODL has been incorporated into the rhetoric of the Information Society which promises 'the potential to improve the quality of life of Europe's citizens, the efficiency of our social and economic organization and to reinforce cohesion' (CEC, 1994). However, where, in the past, ODL was seen as an instrument to widen access to the disadvantaged, now it is seen almost solely in the context of the new technologies (SCIENTER, 1997). Rumble points out that while the cost of technology may be decreasing, those who cannot afford to participate are 'being written out of the game' and the temptation for market led providers of distance education is simply to forget those market sectors which cannot pay for their product (Rumble, 2001a: 231).

The impact of the use of ICTs in education has been to create a convergence between ODL and the conventional system; however, paradoxically this is leading potentially to an increase in the numbers excluded from participation through lack of access to the required technologies. Thus, the effect of EU policies may be to increase the problem of exclusion, rather than to alleviate it. This chapter considers one of the barriers to implementing EU strategies for ODL and eLearning, the divide between those who have access to the technology and those who have not. Often referred to as the 'digital divide', there is much debate about the nature and importance of the digital divide as a real obstacle to elearning. The debate surrounding the nature of the digital divide will be discussed in the first section, followed by an analysis of the status of the divide in the US. The next section will map the existence of the digital divide as it occurs in EU Member States, presenting statistics gathered from a range of EU surveys. An analysis of responses from the Member States will demonstrate a remarkable convergence of strategic initiatives centred on the EU Information Society and eEurope initiatives. The chapter will end with an evaluation of the effectiveness, or otherwise of these attempts to bridge the digital divide.

### **9.2 THE DIGITAL DIVIDE DEBATE**

The rhetoric of the Information Society tends to stress the great potential of ICTs to transform all aspects of life: egovernment, ehealth, ecommerce, elearning. The possibility of exclusion is referred, to but quickly subsumed with an optimistic reference to the potential of ICTs. An example of this can be found in the report of a seminar on Training in the Information Society held in Brussels in 1994 as a follow up to the Bangemann report, and as a contribution to the Commission's Action plan on the Information Society. This seminar deliberated on the great potential of ICTs while also recognising the 'danger of the rift between information rich and poor'. However, it concluded that 'it could be shown that the new technologies could have a positive impact on equal access for all learners and could ensure their improved social and professional opportunities' (Paprotté, 1996: 8). Indeed, some commentators, influenced by the pro-market rhetoric of the Bush administration, deny the existence of a divide, declaring the war is won (Compaine, 2001; Strover, 2003). According to one such commentator, Adam Clayton Powell III, (vice president of Technology and Programs at The Freedom Forum, a US based conservative think tank) 'now that personal computers cost less than TVs and Internet access is cheaper than cable (or even free)...every American who wants one is getting a PC' (Clayton Powell III, 2001: 313). Instead he finds that the media

misled by stereotypes, misinformed about survey techniques, and misdirected by interest groups...have treated the digital divide as a crisis requiring government intervention. As

a result, billions of dollars might be spent to address needs that no longer exist (Clayton Powell III, 2001: 309).

Other commentators are rather more careful in their view of the role of technology. UNESCO (1999) expressed a fear that while the use of new technologies in education may open up new opportunities, they also create the danger of new divisions, new disparities, and cultural hegemony. Gladieux and Swail (1999) show that while the Web may shatter geographical barriers, disparities in access to technology will lead to the creation of new barriers to access. The National Telecommunications and Information Administration (NTIA) in their annual surveys of access to the Internet among US citizens have found that despite the apparent widespread diffusion of computers in society, access continues to be stratified by socio-economic class, gender, race and indeed geographical location (NTIA, 1998; Victory and Cooper, 2002). One way of interpreting these findings might be to suggest that different groups are adopting at different rates, but eventually adoption will reach saturation point, as happened with television, for example. However as DiMaggio and Cohen (2004: 3) point out:

Once one documents inequality in access to a relatively new technology, it becomes imperative to understand the trajectory along which the technology is diffusing. Without a model of the diffusion process, one has no way of knowing whether a given level of inequality represents a long-term policy challenge or a temporary inconvenience.

DiMaggio and Cohen (2004) compared the rates of adoption in the US of television (starting 1948) and the Internet (starting 1994), and found that both technologies showed similar levels of diffusion in the first three years. However, after the fourth year, while television continued to diffuse rapidly until virtual saturation point was reached by the mid 1950s, 'The Internet for all its utility and appeal, diffused more slowly due to its novelty and strangeness (especially to older Americans), its complexity, and the ongoing service charge' (DiMaggio and Cohen, 2004: 21). By 2001, while gender inequality in Internet use had disappeared, disparities in adoption by race, income, age, and educational attainment remained constant; i.e. sociodemographic factors have had a more persistent effect on Internet adoption. Similar disparities are found in Europe as will be shown later in this chapter.

A number of writers are concerned to point out that the debate on the digital divide is dominated by technological determinism; that there has been too much attention paid to access issues and not enough to other types of divides: for example, the learning divide, the knowledge gap, the content divide, through which the Internet will continue to advantage some groups over others (Bonfadelli, 2002; Light, 2001; Rogers, 2001; Strover, 2003). Bonfadelli argues that

not only public debate on the digital divide but Internet research too is still based on a traditional, technology centred paradigm and therefore does not reflect the inherent complexities of the processes of diffusion, adoption and integration of the Internet as a new medium in society (Bonfadelli, 2002: 81).

Rogers notes that the characteristics of early adopters of the Internet mirror those of early adopters of most innovations which are often designed for those with most resources, and with highest status, educational and literacy levels (Rogers, 2001: 103). Light (2001) compares contemporary debates on the digital divide with those in the 1960s and 70s in the USA on the potential of access to cable television to empower communities and reduce inequality. Stating that 'Hopes for a more equal future society are one of the most popular fantasies fastened onto new technologies' she points out that many technologies hailed as the future for educational technology (including cable TV) have in the end emerged as primarily

media for entertainment and shopping (Light, 2001: 716). Quite simply, she argues, 'By constructing the digital divide as a problem with a technological solution, interest groups across the political spectrum have turned attention away from how other structural forces that create problems of inequality continue to exert their effects' (Light, 2001: 711). Strover, introducing a special edition of *The Information Society* journal on the theme of 'remapping the digital divide' states

The essays in this issue explore various locations of the digital divide and seek to remap its contours...They go well beyond issues of access, and challenge the symbolic, opportunistic, and even the practical ways we have addressed the digital divide to date. As a collection, their attention to political, social, and economic contexts allows us to see the digital divide as far more than access to equipment (Strover, 2003: 276).

Joseph, in his introduction to a special edition of *Prometheus* journal on the digital divide, argues for a broader definition (Joseph, 2001). He argues that the digital divide 'commonly understood as denoting the difference between digital technology 'haves' and 'have nots', either within developed countries or between developed and developing countries is far from simple to explain in policy practice' (Joseph, 2001: 333). He suggests that the digital divide cannot be understood as a simple technological phenomenon, leading to a form of 'technical instrumentalism with associated simplistic 'tech-fix' policy remedies' (Joseph, 2001: 334). He quotes J.P. Singh's message to the effect that the lessons of the last fifty years have shown that 'infrastructure is important but it can only be properly utilised if it is embedded in organisations, institutions and societies.'...'infrastructures do not bring about progress and growth: the institutions in which they are embedded do.' (Singh, quoted in Joseph, 2001: 334).

Rogers points out that research on earlier communications technologies have shown how wider access to mass media have tended to exacerbate knowledge gaps between rich and poor (Rogers, 2001: 107). According to Bonfadelli, the knowledge gap hypothesis, first formulated in the 1970s by Tichenor, Donoghue and Olien, and based on some twenty years of research into mass media, postulates that the higher educated have an innate advantage in accessing information transmitted through the media over their less educated compatriots (Bonfadelli, 2002). These advantages include: better educated people have better communication skills, prior knowledge, and relevant social contacts; they display selective use, acceptance and storage of information, and use more information rich media in the form of print, whereas less well educated populations are more dependent on television for information (Bonfadelli, 2002: 68-9). Bonfadelli also points out that the Information Society debate frequently refers to the knowledge gap hypothesis, often without discussion of the theoretical background or empirical evidence (Bonfadelli, 2002). He points out that technological optimists assume that the Information Society will mean an informed society for all, while pessimists fear an increasing digital divide between information rich and information poor, i.e. those without access to the Internet (or quoting Eichmann, 'users' and 'losers'). This knowledge or information gap is of concern if one accepts that possession of knowledge translates into social power and resources.

Not only is there a lack of solid empirical data that could demonstrate, for example, the advantages of Internet access over the use of the traditional mass media, but even from a theoretical perspective it is also rather unclear if the policy postulate of Internet access for everybody will be the necessary factor for success in the future – or if access to media or Internet information will be relevant at all. On the contrary, it could be suggested that, above all, growing access and thereby increased availability of information will result in the creation of an information elite and new knowledge gaps due to the Internet, as was formulated by the knowledge gap hypothesis for the old mass media (Bonfadelli, 2002: 66).

In applying the knowledge gap perspective to the Internet Bonfadelli notes that new skills are required to make meaningful use of the Internet such as the ability to search for and interpret sources; these are functions carried out on behalf of the public in relation to other mass media by print and broadcast journalists (Bonfadelli, 2002: 72). He concludes that 'in comparison to the traditional media the Internet fosters audience fragmentation and individualised information seeking; and this could result in an increasing disintegration of individual agendas and the amount of shared knowledge' (Bonfadelli, 2002: 73). Drawing on empirical evidence on Internet access in Switzerland between 1997 and 2000, Bonfadelli showed that even where there is access to the Internet, there are still disparities in the type of use, whereby those with higher education attainment tend to use the Internet for information (64% with higher education compared with 53% with lower education) whereas those with lower education levels are more inclined to use the Internet for entertainment (72% of those with lower education compared with 35% of those with higher education) (Bonfadelli, 2002: 79). He concludes that despite the almost unlimited content on the Internet, individual characteristics and interests lead to significantly different usage patterns, thus 'internet access alone obviously does not automatically guarantee an informed and knowledgeable public' (Bonfadelli, 2002: 81). Therefore, while there is a digital divide in terms of access, one must not ignore the structural basis of this divide. While evidence appears to indicate a convergence process based on access data alone (especially in the US) this does not mean inequality will disappear. Light suggests that a careful reading of the history of technological fixes will show that caution should be exercised before believing that simply increasing the availability of computers will somehow eliminate educational, economic and social inequalities (Light, 2001: 714).

The data provided in the next two sections should be interpreted in the light of these concerns to avoid falling into the 'technofix' trap. However, one cannot ignore the reality that there are disparities in access and these will inevitably require strategies and policies to ensure that disadvantaged people are not debarred from participating in education. These sections will discuss the digital divide in the United States and the Member States of the European Union before moving on to a discussion of how the Member States have attempted to address the challenge of bridging the digital divide.

### **9.3 'FALLING THROUGH THE NET' OR 'AMERICANS ONLINE'**

The United States is frequently seen as the main competitor to Europe and there is keen interest in comparing technology penetration rates in both jurisdictions. Murdock (2002) notes that the Clinton-Gore administration in the early 1990s recognised the problems posed by exclusion from digital society. The federal government commissioned a series of studies on Internet access, carried out by the National Telecommunications and Information Administration (NTIA) and based on large-scale surveys and census data. The title of the series of survey reports published under the Clinton administration was 'Falling through the net'. However, the first report published under the Bush administration in February 2002 was titled 'A nation online: how Americans are Expanding their Use of the Internet' which some writers consider displays an interesting change in focus from the 'unconnected' to the 'connected' (Murdock, 2002; Twist, 2002).

In the foreword to the 2002 report, Donald L. Evans, Secretary of the US Department of Commerce wrote:

The expanding use of new technologies continues to strengthen our economy. More Americans can now engage in online commerce, obtain e-government services and access valuable information. Broadband connections are also on the rise. These high-speed connections will make it easier for people to engage in distance learning programs

or telemedicine and to access a whole new array of entertainment and services that are on the horizon (Victory and Cooper, 2002: 1).

Based on data collected by the US Census Bureau's Current Population Survey of 57,000 households and 137,000 individuals in all states in September 2001, the report estimates the rate of growth of Internet use in the US to be two million new users per month, an increase of 26 million in thirteen months. Thus, in September 2001, 143 million Americans or 54% of the population were online. Two thirds of Americans were using computers, and home ownership of PCs had grown from 8.2% in 1984 to 56.5% in 2001. Some 60.2 million homes (56.5%) had PCs, of which 88.1% had Internet, and 45% of the population was using email. The report concludes that

Internet use is increasing for people regardless of income, education, age, race, ethnicity or gender...Those who have been the least traditional users - people of lower income levels, lower education levels, or the elderly - are among the fastest adopters of this new technology. ...the expanding use of internet at schools, work and libraries has extended access further even where not available at home....This means that our children will gain the skills and familiarity with new technologies that will allow them to find jobs in our new economy (Victory and Cooper, 2002: 95).

However, careful analysis of the data reveals that while rates of use may have increased, divides persist based on income, employment, education, age, race and location. The only difference which seems to be disappearing is the gender gap, with women increasing their usage and access to the Internet. The 'unconnected' are on low income (75% of those with less than US\$15,000 annual income); Hispanics and Black; less educated, and resident in rural areas or central cities. As Wilhelm points out, there are good reasons for the persistence of the digital divide along income lines since, unlike the purchase of other goods such as televisions or radios, Internet access is not a 'once off purchase'; instead there are connection charges, line charges, and the cost of updating software and peripherals to keep up with constant upgrades in the technology (Wilhelm quoted in Murdock, 2002: 387). An interesting phenomenon which gives rise to concerns that Internet access may have plateaued is the fact that among the unconnected are 3.6million households which have chosen to disconnect from the Internet. The main reason given by 53.1% is 'don't want it', followed by cost (25.3%). Among the other reasons were concerns with the nature of the material on the web, security and loss of confidentiality. Nevertheless, Internet penetration has continued to rise with a Nielsen/Netratings survey in March 2004 estimating that 75% of US households which had a telephone line were linked with the Internet.<sup>398</sup>

In the next section the digital divide in Europe will be examined. As will be seen, while overall participation and access to the Internet in Europe lags behind that in the US, the divide breaks along similar cleavages.

## **9.4 MAPPING THE DIVIDE IN EUROPE**

This section examines the evidence for a digital divide in Europe, using statistics produced by the EU. This analysis will be confined to the fifteen states which were members of the EU prior to 1 May 2004. It should be noted that these states display a number of pre-existing disparities, economic, social, cultural and educational. As can be seen from Figures 9.1 and 9.2 there are significant inequalities in educational attainment between both between the EU Member States, and between the EU, the US and Japan, with both Japan and the US having a far greater proportion of the population who have completed upper second level education

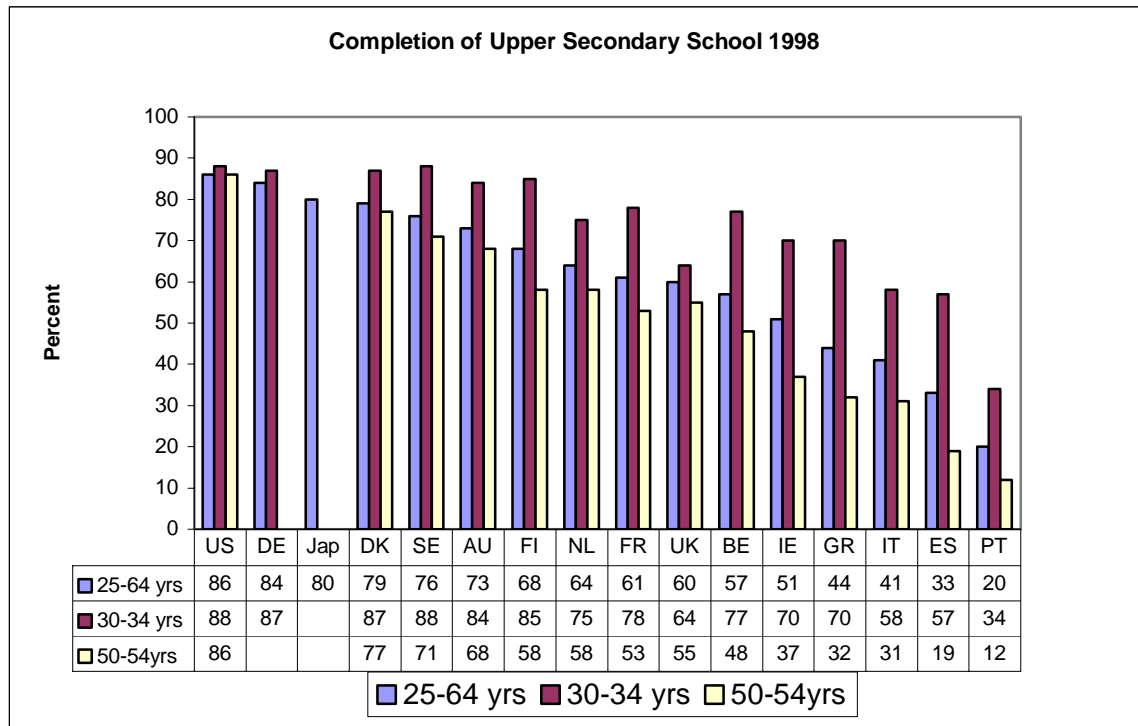
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<sup>398</sup> Nielsen/Netratings Survey March 2004 available at <http://www.websiteoptimization.com/bw/04031> accessed 1 July 2004.



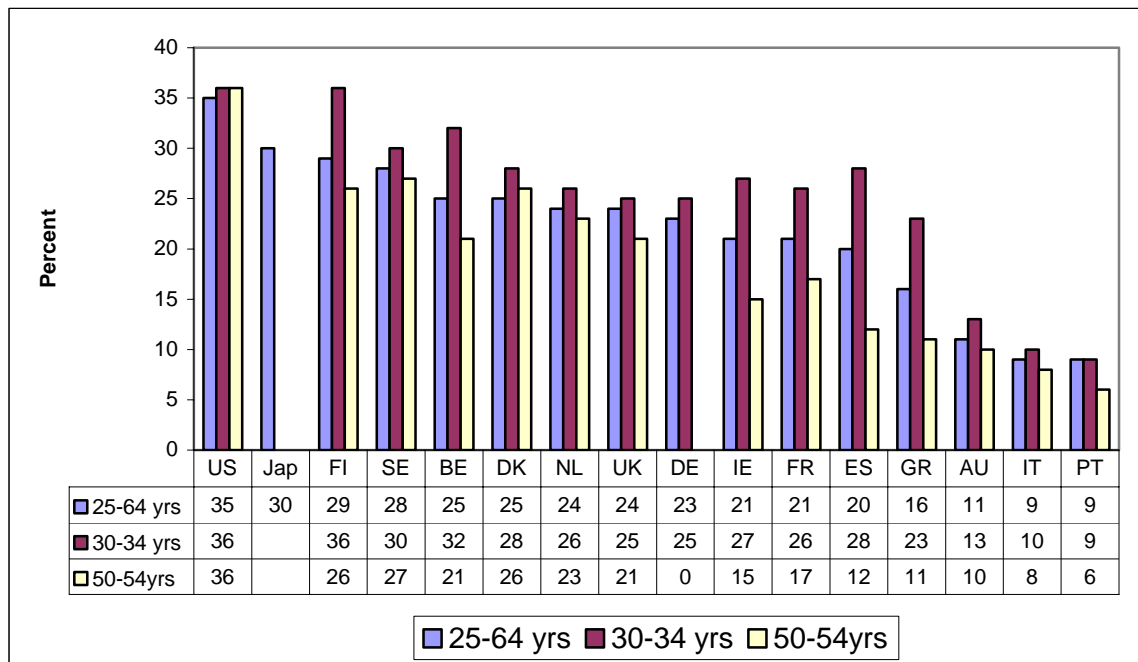
and who have completed tertiary qualifications. While a clear generational effect may be observed in that in all Member States, the level of education among the 30-34 year age group is substantially higher than that of the 50-54 years age group, nevertheless, disparities between Member States persist. Just over one third of those aged 30-34 years in Portugal had completed upper secondary education in 1998, compared with 88% of Swedes in the same age group; just 9% of the 30-34 year olds in Portugal had completed tertiary qualifications compared with 36% of Finns. These disparities in educational attainment should be borne in mind in examining the statistics for access to technology in later figures. Those countries which have the highest educational attainment (Denmark, Sweden, Finland) tend to be the leaders with regard to access to technology, while those with the lowest educational attainment (Portugal, Spain) also tend to lag behind in access to technology.

**Figure 9.1: Completion of Upper Secondary School 1998**



Source: OECD 2001 Education Policy Analysis Paris: OECD

**Figure 9.2: Completion of Tertiary Qualifications 1998**



Source: OECD 2001 Education Policy Analysis Paris: OECD

The EU has monitored access to the ICTs since 1997 using its Standard Eurobarometer surveys. More recently, following the Lisbon eEurope summit in 1999, the EU has commissioned a series of benchmarking reports on access to the Internet designed to monitor progress in meeting the targets set in the eEurope strategy (CEC, 2002a). In 2000 a comprehensive survey of 16,078 individuals was carried out in the Member States. The data for this report were collected through face to face interviews with residents of the EU members states, aged 15 years and over. A multi-stage, random sample was applied, with a number of sampling points drawn with the ‘probability proportional to population size (for a total coverage of the country) and to population density’ (INRA, 2000: 1). The report asked questions on access to a range of technologies available to respondents (e.g. mobile phones, home access and use of desktop PCs, CD-ROMs, Game Consoles, home access and use of the Internet, ISDN line, fax, digital TV, Cable TV, and satellite dish). The access data were categorised by country, gender, age group, employment status and educational status. Table 9.1 collates these data into one table. Figures relating to the number of ECDL<sup>399</sup> (European Computer Driving Licence) cards issued per 1000 population have been added.

<sup>399</sup> The European Computer Driving Licence was launched in Sweden in 1997 with funding from the European Commission; the European Driving Licence Foundation Ltd was established in Dublin in 1997 with a grant from the Irish government; the ECDL has become an internationally accepted certification for computer users (see <http://www.ecdl.com/main/history.php>)

**Table 9.1: Home Access to a Range of Technologies March 2000**

	% Mobile phone	% PC	% Cd- rom	% Game console	% Internet	% Fax	% Digital tv	% Cable tv	% Satellite dish	% ECDL per 1000*
Austria	51	32	27	15	17	13	7	37	47	10.25
Belgium	50	42	31	21	20	12	10	91	3	0.30
Denmark	61	59	54	19	45	11	4	57	21	34.15
Finland	80	45	17	19	28	9	1	37	8	19.31
France	52	29	22	32	13	9	7	15	16	0.52
Germany	39	32	24	14	14	13	7	58	38	1.15
Greece	52	15	7	8	6	2	3	8	1	1.59
Ireland	50	28	18	29	17	6	5	48	13	42.39
Italy	73	35	23	18	19	8	9	22	12	3.89
Luxembourg	64	45	44	29	27	22	2	86	17	NA
Netherlands	63	66	56	22	46	18	4	93	8	1.89
Portugal	47	20	13	12	8	3	1	23	13	0.17
Spain	57	34	21	27	10	4	12	11	15	0.01
Sweden	71	56	43	14	48	12	6	54	22	39.79
United Kingdom	57	36	26	34	24	8	15	19	23	5.50
<b>EU average</b>	<b>55</b>	<b>35</b>	<b>25</b>	<b>23</b>	<b>18</b>	<b>9</b>	<b>8</b>	<b>34</b>	<b>21</b>	
Male	59	39	28	25	21	11	10	33	22	
Female	52	32	22	21	16	8	7	34	20	
15-24	73	46	35	41	23	9	12	33	21	
25-39	68	42	30	30	24	11	10	36	23	
40-54	61	44	31	24	23	12	9	33	23	
55+	30	16	10	6	8	6	4	33	17	
Self employed	74	43	30	22	24	24	11	29	22	
Employed	65	43	31	28	23	10	10	36	23	
Not working	43	26	18	18	13	6	7	33	18	
Education 15-	36	16	8	13	6	3	6	27	17	
16-19	59	34	21	28	17	9	10	37	23	
20+	68	53	41	19	33	17	9	38	21	
Still studying	70	59	45	40	33	12	11	35	21	
Base	16078	16078	16078	16078	16078	16078	16078	16078	16078	

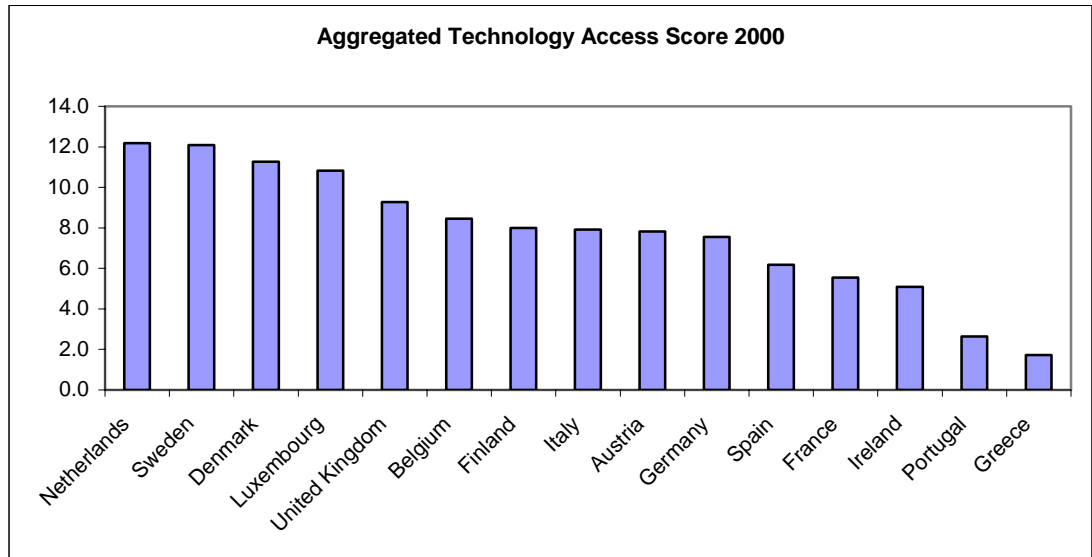
Source: INRA 2001 Eurobarometer *Measuring Information Society*; \* data on ECDL from McCaffery 2002.

The data in the report *Measuring Information Society 2000* will be used to identify the pattern of access throughout the Member States. It is of course an unfortunate aspect of statistics that they become out of date very rapidly, and later surveys have identified increasing access to PCs and the Internet. Nevertheless, as will be seen from Figure 9.4 the distribution pattern between Member States remains relatively unaltered. The data from the March 2000 survey will be analysed further to illustrate the main elements of the digital divide as they are experienced by gender, age, education, and employment status.

In order to compare the level of access to a range of technologies between countries, an aggregated technology access score was computed by ranking countries in respect of access to mobile phones, desktop PC, use of home PC, cable TV, CD-ROM, satellite dish, Internet access and use of Internet, digital TV, ISDN Line, and DVD player, and calculating the average ranking across the range of technologies. The results are illustrated in Figure 9.3 which shows a broadly tripartite divide across Europe. The first group with high levels of access include Netherlands, Sweden, Denmark, Luxembourg and the UK. The moderate

access group includes Belgium, Finland, Italy, Austria and Germany, while Spain, France, Ireland, Portugal and Greece lag behind.

**Figure 9.3 The Digital Divide in Europe**



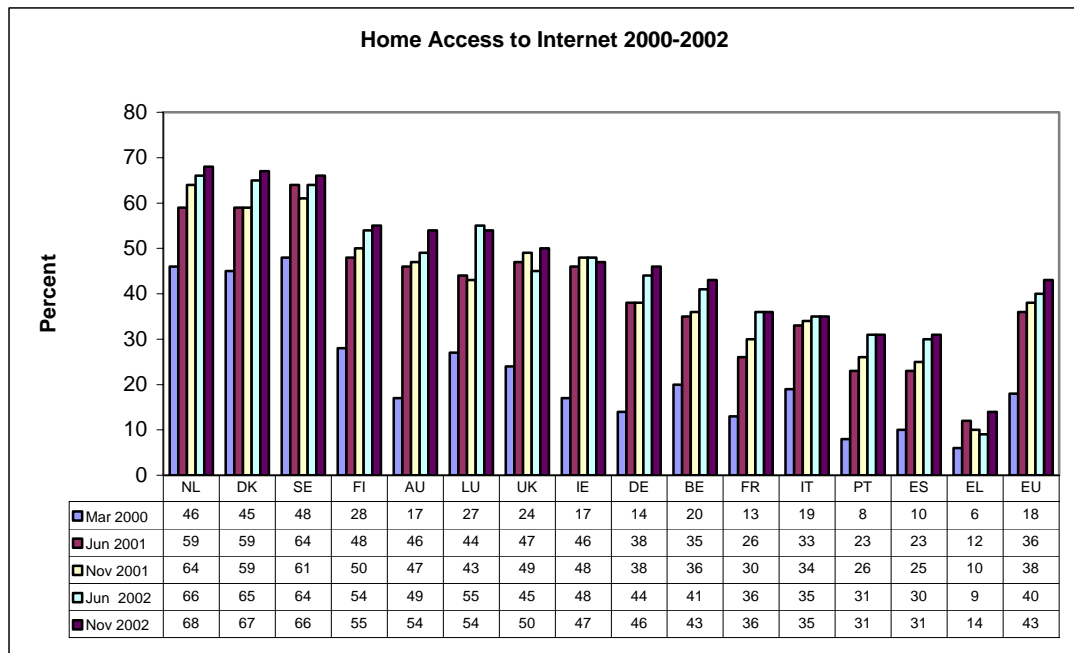
Source: INRA 2001 Eurobarometer Measuring Information Society

#### 9.4.1 ACCESS TO THE INTERNET

Since access to the Internet is taken as a measure of overall technological access in many surveys, it is useful to examine trends between March 2000 and November 2002 (the most recently published figures at the time of writing). The EU tracked household access to the Internet in its Eurobarometer Series *Internet and the Public at Large* between March 2000 and November 2002. Some 18% of EU households were connected to the Internet in March 2000 rising to 43% in November 2002. As Figure 9.4 shows, access to the Internet increased in all countries in this period, however, this masks some interesting trends. Netherlands, Denmark and Sweden had the highest levels of access to the Internet in November 2002 but there was relatively little change in the previous 18 months. Meanwhile, access in some states had increased significantly in the same period, including Austria, the UK, Ireland and Germany. Ireland had moved out of the lagging group, but France, Portugal, Spain and Greece remained significantly behind the rest of the EU states. The surveys also demonstrated that some states experienced fluctuations from year to year; for example between June and November 2001, Internet access in 5 countries (Greece, Italy, Luxembourg, Sweden and UK) had decreased, 2 were the same (Denmark and Germany) and 8 had increased. The report commented that the decrease was unexpected, but explained that penetration fluctuations should be

seen as normal in a buoyant and unstable market: households get connected on a daily basis while others cancel internet access...when attractive sites shut down or when previously free of charge access now comes with a charge...in addition it is not impossible that the Internet market may also be subject to seasonal variation...lastly, we should also consider the assumption according to which those potentially interested in this new media do not include the entire population, which serves to explain the saturation of penetration rates while products and services remain unchanged (EOS Gallup Europe, 2002: 9).

**Figure 9.4: Home Access to the Internet March 2000-November 2002**

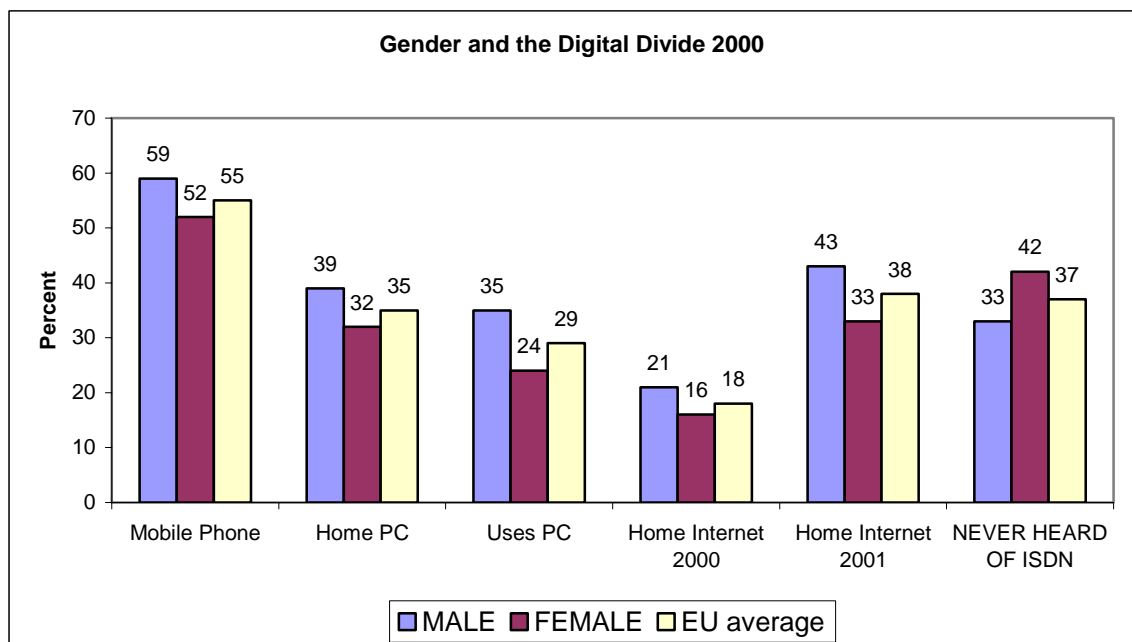


Sources: Eurobarometer Surveys Nos 53; 103; 112; 125; 135

#### 9.4.2 GENDER AND ACCESS TO TECHNOLOGY

As Figure 9.5 illustrates, while the diversity in access to technologies along gender lines is not as substantial as that for age, education and employment, nevertheless, disparities persist. Women are less likely than men to have access to mobile phones, home PCs, and Internet. They are also less likely to use PCs or Internet access, and less likely to have heard of ISDN.

**Figure 9.5: Gender and access to technologies 2000**



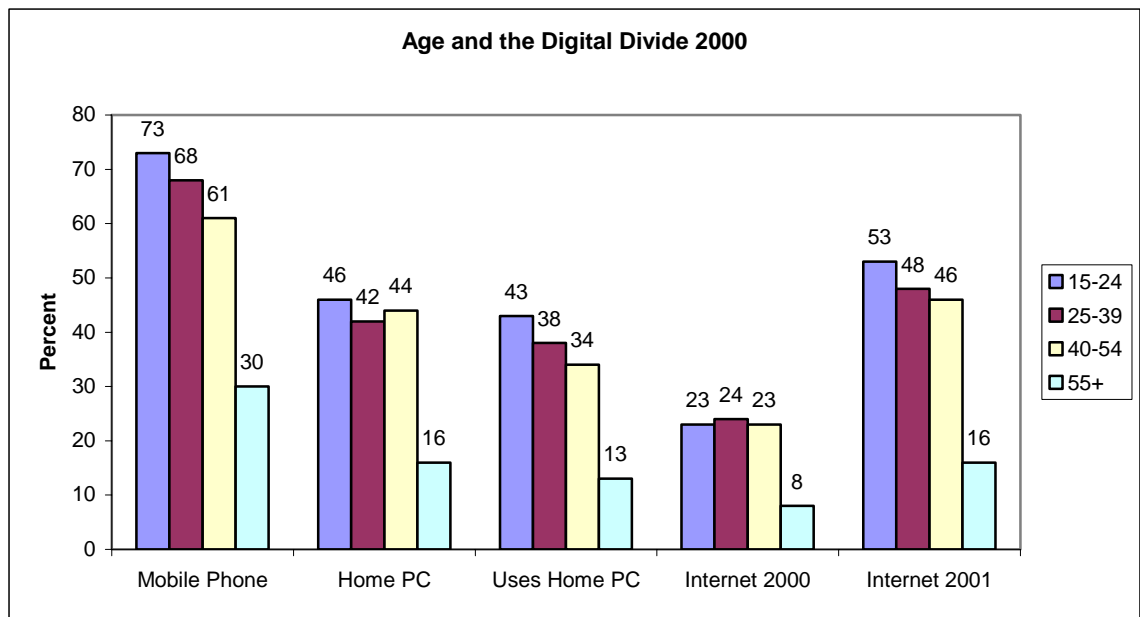
Source: INRA 2000 Eurobarometer: Measuring the Information Society



### 9.4.3 AGE AND ACCESS TO TECHNOLOGY

Figure 9.6 shows that those over 55 years are significantly less like to access and use PCs and the Internet. Just 16% of those aged 55 and over had access to the Internet in November 2001, compared with 53% of the 15 to 24 age group, and similar disparities are seen for access to PCs and mobile phones. However Loges and Jung comment that while the digital divide between old and young in the US is well documented, this may not be just a generational effect in that older respondents share the same views on the Internet's centrality to their lives with the young (Loges and Jung, 2001). However older users tend to pursue 'a more narrow range of personal goals online and with a pattern of connecting to the Internet from a smaller range of places' (Loges and Jung, 2001: 536).

**Figure 9.6: Age and access to technologies**

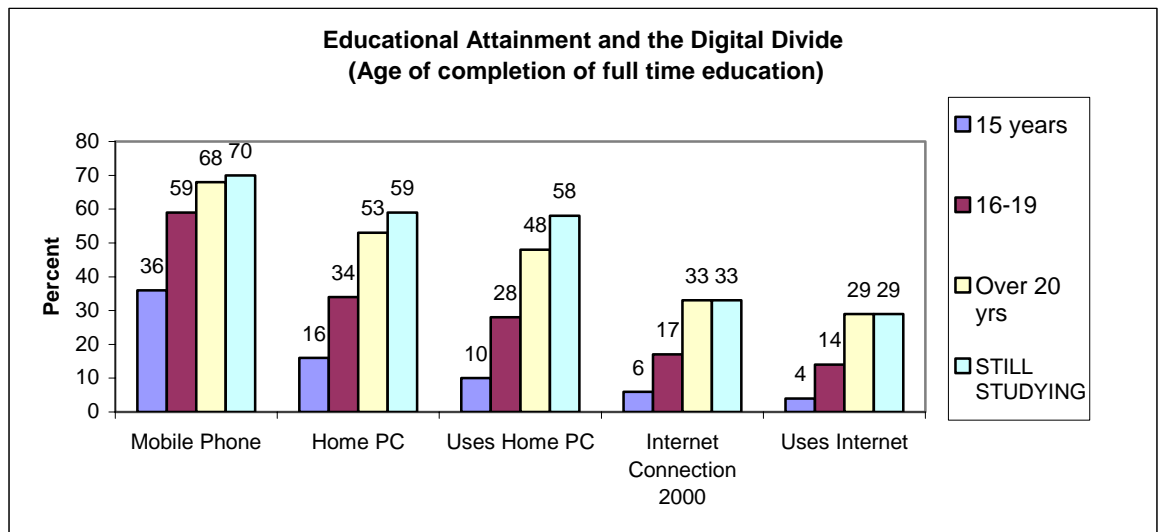


Source: INRA 2000 Eurobarometer: Measuring the Information Society

### 9.4.4 EDUCATIONAL ATTAINMENT

As Figure 9.7 shows, educational attainment is closely related to access and use of technologies. Those who completed their education at 15 years are significantly less likely to use PCs or the Internet than those who completed their education after the age of twenty, or who are still studying.

**Figure 9.7: Educational Attainment and Access to Technologies**

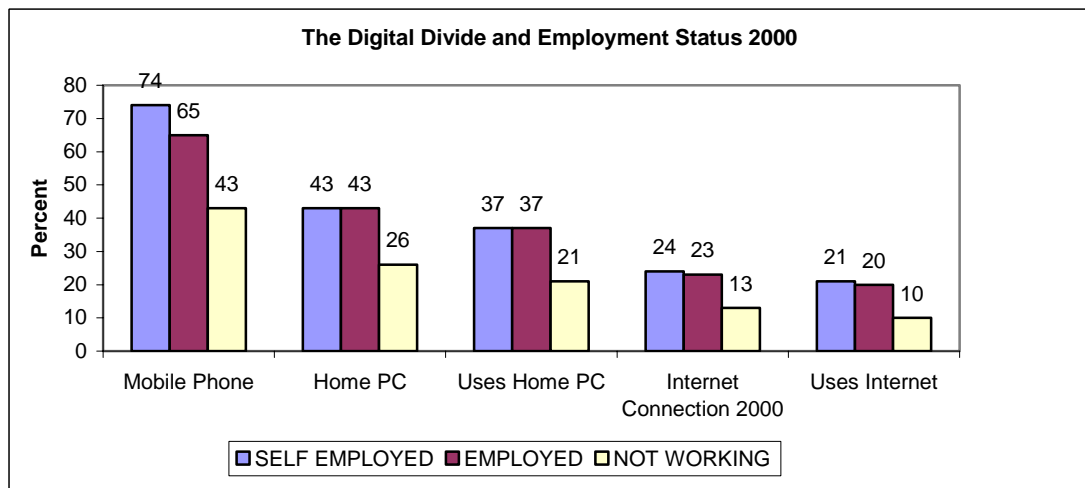


Source: INRA 2000 Eurobarometer: Measuring the Information Society

#### 9.4.5 EMPLOYMENT STATUS AND ACCESS TO TECHNOLOGIES

As Table 9.8 shows access to technologies is stratified on occupational lines, with those in employment twice as likely to use PCs and the Internet compared with those who are not working.

**Figure 9.8: Employment status and access to technologies**



Source: INRA 2000 Eurobarometer: Measuring the Information Society

Information society policies promoting egovernment, elearning, ehealth etc. cannot be expected to reach all citizens where large groups do not have the means by which to connect. Having illustrated, in this section, the existence and persistence of a digital divide in Europe, which is both geographically and structurally located, the next section turns to the strategies used by various Member States to bring citizens into the Information Society.

## 9.5 BRIDGING THE DIVIDE – MEMBER STATE INFORMATION SOCIETY STRATEGIES

As the previous sections have established, a number of digital divides exist in Europe in the form of access, level of use and preparedness. These divides present formidable challenges to the widespread adoption of ICTs in education, especially distance education. While it appears inevitable that education will be transformed by technology, because of the overarching globalisation processes at play, one key question to be addressed is who pays? It is clear that the most disadvantaged groups will not be in a position to pay the high costs involved. In some cases industry has taken the lead. Murdock comments that industrial corporations are 'key actors in shaping societies...there is plenty of evidence to show that their concerted lobbying, extensive public relations activities and the well-oiled revolving doors connecting cabinet rooms to boardrooms have moved them to the centre of policy formation' (Murdock, 2002: 389). Byron and Gagliardi noting that computer companies introduced computers into US schools in the 1960s and 1970s state that 'Industry recognises the benefits of fostering the educational market and in educating populations to be competent in and dependent on the new ICTs' (Byron and Gagliardi, 1998). Some 80% of funding for the UK Education Superhighways initiative was funded by industries such as IBM, INTEL, Microsoft and British Telecom. In 2000, Microsoft donated \$344 million worth of software (Microsoft Office 2000 professional and copies of Encarta) to K-12 school in the US, while Intel invested \$100 million in providing training to some 400,000 teachers in twenty countries (Weissman-Morris, 2000). It was noted that the founder of Microsoft, Bill Gates was present when the British Prime Minister announced the National Grid for Learning in October 1997, which aimed to link all British schools to the Internet by 2002; he was also present when the German Chancellor, Gerhard Schroeder announced that the German government planned to bring all schools online by 2001 and to spend £50 million on computer literacy (The Irish Times, 1999). The Irish Government was reported to have argued that profitable telecommunications companies such as Eircom, Vodafone, and O2 should sponsor the costs of providing technology in schools (Smyth, 2003). However there are drawbacks to leaving the development of education products to industry. Byron and Gagliardi (1998) note that most commercially produced educational software should more correctly be classified as 'edutainment' rather than pedagogically useful tools. The Irish government was criticised by ICT Ireland, a lobby group for the technology industry, for its slow pace in producing a new ICT strategy for schools, in 2004 (Smyth, 2004).

It is clear that market mechanisms in themselves will not equalise access to education, and this is an area where state policies must intervene (Gladieux and Swail, 1999). The EU has demonstrated its clear conviction that national governments must play their part in laying the foundations for the Information Society (CEC, 2002a). Even before the Information Society initiatives were launched, as early as 1983, the terms of the Council resolution on the introduction of new information technologies into education<sup>400</sup> required the Commission to submit reports on progress made by the Member States in this regard (CEC, 1989). Each Member State nominated national officials concerned with new technologies to a working party charged with steering Community action. The interim report, derived from statistics and reports provided by these officials, illustrated the 'spectacular development' reported by Member States with regard to installation of equipment, training of teachers, production of software, although most development was reported at secondary level, with slow progress reported at primary level (CEC, 1989: 1 & 25). However, it was reported that the long term strategy in the Member States was to integrate new information technologies into the whole education system (CEC, 1989: 20) and that while the situation varied between countries,

<sup>400</sup> OJ No C 256 24 September 1983.

‘each Member State was now resolutely tackling the job of introducing NIT into schools’ (CEC, 1989: 24). The findings of this report have been incorporated in Table 9.2 below<sup>401</sup>.

The key role of the Member States in implementing the Information Society was reiterated in 1994 by Riché-Magnier, a French civil servant and a national expert for the Commission’s DG Telecommunications, Information Markets and Research. She wrote that government has a

duty to accompany the transition towards the new economic and social systems in order to secure the economic, social and cultural cohesion of our societies. ....[a] key action will be the launch of a far reaching debate on the new challenges of the information society and the identification of appropriate responses’ (Riché-Magnier, et al., 1996: 21).

She finishes by stating that ‘the European Commission is assuming its responsibilities and has taken a leadership in addressing these issues. In accordance with the principle of subsidiarity, it is now up to national governments to follow suit.’ (Riché-Magnier, et al., 1996: 21). It is not proposed in this thesis to go into a detailed analysis of how Member States have gone about meeting this challenge, however scrutiny of Table 9.2 will demonstrate that in their responses to the Information Society dynamic, Member States have shown a marked convergence in their strategies, perhaps through policy imitation, but more in response to the driving force of the EU’s eEurope strategy. In this they appear to be conforming to what Rakic describes as the law of anticipated results where policy makers adjust their policies to the situation they anticipate, in this case, the demands of the EU that Member States take on board policies to bring about the Information Society in Europe (Rakic, 2001). As Rakic points out, Member States are aware that ‘even if not directly coerced into a policy by the EU, major deviation from dominant trends will be detrimental to their country’ (Rakic, 2001: 236). Nevertheless, despite the apparent convergence, Hansson and Holmberg have found evidence in their analysis of European national ICT policies that countries differ in the motivating factors behind their policies. These policies show broadly three different tendencies: change, increase, and or protect (Hansson and Holmberg, 2003:4). Some countries have radical policies designed to change power relations between teacher and learner and the nature of what is taught in the context of the new knowledge economy, while other countries aim to use ICTs to increase access, quality, production, and or cooperation, but within the traditional paradigm. Others are concerned to protect their language, culture, and economy from the effects of globalising tendencies.

Table 9.2 summarises for each EU member state the current level of technology in education, and the types of Information Society strategies that have been adopted with examples of initiatives. While the information provided is indicative rather than exhaustive, it is clear that states are working to a number of common objectives. These include: encouragement of private sector investment; promotion of open competition and liberalisation of telecommunications infrastructures; provision of open access to the network for all information providers and users; creation of flexible regulatory environments that keep pace with rapid technological and market change ensuring universal service; stimulation of demand for e-services (ehealth, egovernment, ecommerce, eLearning ). While it is clear that the Information Society initiatives of the 1990s refocused and reenergized the debate on technology in education, the strategies and initiatives adopted had their roots in the earlier initiatives in the 1980s. The early adopter states included the UK and France.

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<sup>401</sup> As part of a EU project funded under the Socrates Minerva action, the author commissioned a survey of member state initiatives in response to the Information Society. Information was collated by Conor McCaffery under the supervision of the author and published in a report for the project in 2003 (McCaffery, 2003). The author has summarised these strategies and added them to Table 9.2 below.

Surprisingly, despite Portugal's early start with the Minerva programme in 1985, Portugal is still one of the lagging countries with regard to the digital divide in Europe.

What is most interesting in the initiatives adopted by the Member States is the scarcity of initiatives at higher education level, with the exception of initiatives aimed at training teachers. This is perhaps a result of the traditional autonomy of the university and higher education sector, together with the greater capacity of these institutions to invest in technology from the traditionally more generous state funding at this level, as well as access from project and other private income sources.

**Table 9.2: National policies for the Information Society**

State	Technology in the Education System	Information Society Strategy	Examples of Initiatives
Austria	<p>Public private partnerships e.g. Siemens and Philips in Vocational Ed.</p> <ul style="list-style-type: none"> <li>• All federally administered upper secondary schools and half national schools linked to internet since 1999</li> <li>• 17,000 teachers provided with internet access</li> <li>• 50% teachers provided with internet training</li> </ul>	<ul style="list-style-type: none"> <li>• Telecommunications Initiative Launched 1994</li> <li>• Information Society Working Group produced 'The Federal Information Society Report: An Austrian Strategy and Action Plan' April 1997</li> <li>• 'Information Society Action Plan' prepared October 1997</li> <li>• 'Digital Austria Initiative' Launched February 2000 (government/industry partnership)</li> <li>• 'Government's Information and Communication Project' launched April 2000</li> </ul>	<ul style="list-style-type: none"> <li>• EGovernment - connects all local and national governmental bodies and public services on one site</li> <li>• EBusiness initiatives – e.g. EDI Business Austria, Multimedia Business Austria and establishment of business/scientific community 'competence centres'</li> <li>• ICT for rural areas</li> <li>• Department of Agriculture provided internet portal for rural areas</li> <li>• Culture</li> <li>• DERAL provides telematics for rural libraries</li> </ul>
Belgium	<ul style="list-style-type: none"> <li>• The French community incorporates ICT into different subjects in schools – a scheme for 'Multimedia Equipment' set up 1998 to provide equipment to all primary and secondary schools. Internet access is provided to a number of schools by Belgacom for a fee.</li> <li>• The German community provides similar technology facilities to schools</li> <li>• A Flemish Ministerial Committee on Education IT was set up in July 1984. All primary schools were to be equipped by 1990. The Flemish community operates private/public initiatives to gain discounts on computers, equipment and Internet connections for schools.</li> <li>• All communities have projects and initiatives to train teachers and students in use of ICTs</li> </ul>	<ul style="list-style-type: none"> <li>• Federal ICT initiatives started 1994, mainly concerned with diffusion of telecommunications</li> <li>• Measures to stimulate progression to Information Society began 1997</li> <li>• Flemish government launched policy document aimed at building the Flemish Information Society 1998</li> <li>• Walloon government launched specific actions to promote information society November 1997</li> </ul>	<ul style="list-style-type: none"> <li>• 1998 @GORA, Les Assises de la Societé de l'Information</li> <li>• Establishment of interactive broadband network on existing infrastructures (1995-6)</li> <li>• Various multimedia development initiatives</li> <li>• 1996 Walloon region launched WIN to develop region-wide fibre network</li> </ul>
Denmark	<ul style="list-style-type: none"> <li>• Ministerial committee on teaching new information technologies in primary schools set up 1983</li> <li>• 1994 National Centre for technology supported learning set up to assist traditional universities with use of technology (de Vocht, 1995)</li> <li>• Sektor Net (started 1994) linked 80-100% of schools to Internet</li> <li>• Government initiative provides financial support for computer facilities in state schools</li> <li>• Danish Virtual University set up in 1996 linking Danish government, Universities and higher education institutions</li> <li>• Teacher and student training programme in ICT skills launched January 2001 €46 million budget)</li> </ul>	<ul style="list-style-type: none"> <li>• White Paper on 'Info-Society 2000' published 1994</li> <li>• IT Policy Action Plan 1995 'From Vision to Action – Info-Society 2000</li> <li>• IT Policy Action Plan 1996: Info-Society for all – the Danish Model</li> <li>• IT Policy White Paper 'Authorities Heading for a fall' and IT-Policy Action plan 1997/98 'Action for Change</li> <li>• Electronic Commerce in Denmark – a National EDI Action Plan (1996)</li> <li>• Freedom to choose: Action Plan for IT use by people with disabilities (1996)</li> <li>• Government national substrategy for IT research (1997)</li> <li>• Danish strategy for the IT, telecommunications and electronics industries (1998)</li> <li>• Digital Denmark: Conversion to the network society &amp; IT Policy Strategy: Realigning to a network society</li> </ul>	<ul style="list-style-type: none"> <li>• Development of telecommunications infrastructure at minimum cost including wireless subscription network, mobile access to internet, cheaper mobile telephone costs</li> <li>• Code of fundamental rights for citizens in relation to IT</li> <li>• Encouragement and assistance of e-commerce and development of code of conduct</li> <li>• 24-hour digital administration facilitating contact between public authorities and citizens.</li> </ul>



State	Technology in the Education System	Information Society Strategy	Examples of Initiatives
Finland	<p>Technological infrastructure of a high standard but use of ICTs in education inconsistent and inadequate. Ministry for Education and Research published plan for implementation of national strategy for education and research 2000-2004. Focused on:</p> <ul style="list-style-type: none"> <li>Promotion of networks as learning media</li> <li>Accumulation of digital capital</li> <li>Strengthening research and education infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Information Society Advisory Board (1976-91) launched information society type initiatives.</li> <li>Information Society Strategy 'Finland: Towards the Information Society – a National Strategy' launched by Ministry of Finance, 1994</li> <li>National strategy revised 1998 'Quality of Life, Knowledge and Competitiveness' (focus on people, decentralisation, adaptation and cooperation)</li> <li>Information Society Advisory Board launched report</li> </ul>	<ul style="list-style-type: none"> <li>E-Government project – JUNA (1999-2002)</li> <li>Macro Pilot project to develop healthcare and social service system and improve data security and privacy</li> <li>Information society strategy for the Ministry of Transport and Communications</li> </ul>
France	<ul style="list-style-type: none"> <li>1985 'Computers for everyone' plan (PIPT) launched giving all pupils introduction to computing as a tool (CEC, 1989)</li> <li>1997 Plan launched to provide all teachers and students with email address by 2000 (June 1998 80% of higher secondary schools had connection)</li> <li>Initiatives to decrease pupil:computer ratio (14.6:1 in March 2000)</li> <li>Government has allocated €1.1 to increasing access to internet in schools (35% of schools connected in March 1998)</li> <li>High capacity Internet network for research and education to be operational by end 2002.</li> </ul>	<ul style="list-style-type: none"> <li>Government action plan published 1998 'Prepare the entry of France in the Information Society'. Inter-Ministerial committee for the information society set up</li> </ul>	<p>Information Society Policy from 1999/2000 to focus on:</p> <ul style="list-style-type: none"> <li>Education</li> <li>Internet access for all</li> <li>New jobs and ICT training</li> <li>ICT and the third sector</li> <li>Unbundling the local loop</li> <li>International cooperation</li> </ul>
Germany	<ul style="list-style-type: none"> <li>Industrial sector provided 20000 schools with ICT facilities e.g. Schulen ans Netz (developed with Deutsche Telekom)</li> <li>Private company network of 120 companies provides infrastructure, preferential rates, staff to equip schools</li> <li>Schools Online initiative, launched 1996 by Federal Government and DT provide schools with free internet connections</li> <li>Ministry of Education and Research implementing programme to provide ICT facilities for vocational education institutions</li> <li>Federal government allocated €83.34 million to provide computer facilities and communication networks in higher education institutions</li> </ul>	<ul style="list-style-type: none"> <li>1996 Federal Action Plan: Info-2000: Germany's way to the Information Society</li> <li>1999 Federal Action Plan: Innovation and Jobs in the Information Society of the 21<sup>st</sup> Century</li> </ul>	<ul style="list-style-type: none"> <li>Action plan to liberalise telecommunications market and create uniform national legal conditions for use and supply of ICTs</li> <li>1999 Federal Action Plan:</li> <li>Internet for all</li> <li>Establishment of Information Society Forum 1999</li> <li>The Alliance for Jobs, Training and Competitiveness and the green card initiative</li> <li>Regional government initiatives - examples:</li> <li>Brandenburg's Information Strategy 2006</li> <li>The Berlin Way towards the Information Society</li> </ul>
Greece	<ul style="list-style-type: none"> <li>Phaeakes Programme aims to have ratio 12:1 pupils per computer by 2006</li> <li>Odysseia programme (1996-2000) 400 high schools provided with computer laboratories</li> </ul>	<ul style="list-style-type: none"> <li>White Paper 'Greek Strategy for the Information Society: A tool for Employment, Development and Quality of Life' 1995</li> <li>White Paper 'Greece in the Information Society: Strategies and Actions 1999</li> <li>Action plan 'Operational Programme for the Information Society 2000</li> </ul>	<ul style="list-style-type: none"> <li>Klisthenis Programme – modernisation of public administration</li> <li>Teletraining pilot project for teachers</li> <li>Initiatives for development of educational materials and software</li> <li>Development of research networks</li> <li>IT equipment and network connections for schools</li> <li>Qualification of public employees in IT skills</li> </ul>

State	Technology in the Education System	Information Society Strategy	Examples of Initiatives
Ireland	<ul style="list-style-type: none"> <li>• Programme to provide all secondary schools with 'microprocessors' began 1980; completed 1985 (CEC, 1989)</li> <li>• Public/private partnerships in providing technology to education system</li> <li>• Schools IT 2000 launched 1997, EIRCOM the telecommunications provider provided each secondary and primary school with internet connection and internet ready PC</li> <li>• Government investment of €153.64 in ICT in schools by end 2002</li> <li>• Higher Education Authority provides €317.43 for higher education under the Education Technology Fund launched 1997</li> <li>• Teacher training programmes</li> <li>• Government preparing new ICT in schools strategy 2004</li> </ul>	<ul style="list-style-type: none"> <li>• 1997 Report 'Information Society Ireland: Strategy for Action</li> <li>• 1999 'Implementing the Information Society: An Action Plan published</li> </ul>	<ul style="list-style-type: none"> <li>• Information Society Commission established 1997-2000</li> <li>• National Development Plan (2000-2006) aims to provide next generation Internet access to all third level institutions.</li> <li>• €38 million Information Society Fund established 2000. Key areas: <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Infrastructure and connectivity (broadband connection to US and Europe established); delivery of broadband to nineteen towns in the first phase, and eventually 67 towns</li> <li>• Legislation (eCommerce Bill, 2000; Broadcasting Bill)</li> <li>• Training and Research and Development (€2.48 billion for research and development; establishment of MediaLab Europe)</li> <li>• Access (PCs and internet connections for libraries)</li> <li>• Interactive government service provision</li> </ul> </li> </ul>
Italy	<ul style="list-style-type: none"> <li>• National plan to introduce new technology in upper secondary schools launched October 1985; reported to be planning to give all upper secondary schools computer laboratories (CEC, 1989)</li> <li>• Public/private partnerships involved in provision of ICT to schools e.g.</li> <li>• Radiotelevisione Italiana (RIA) provided 5000 schools with digital satellite dishes</li> <li>• Internet providers provide free internet connections (75% of lower secondary and primary schools and 99% of upper secondary schools connected to the Internet)</li> <li>• IBM part of 'Reinventing education initiative</li> <li>• 'Programme PC per gli studenti (PCs for students) scheme provides interest free loans to families to buy PCs</li> </ul>	<ul style="list-style-type: none"> <li>• Information Society Forum established 1996.</li> <li>• 1997 action plan launched 'Promotion of Information Society Development in Italy: A reference scheme'</li> <li>• 1999 Three bodies established to draw up action plan for development of Italian Information Society: The Committee of Ministers for the Information Society; The Information Society Forum; The inter-departmental Study and Working Group.</li> <li>• 2000 Action Plan for the New Economy launched</li> </ul>	<p>1997 Action Plan initiatives included:</p> <ul style="list-style-type: none"> <li>• Reduction in internet tariffs</li> <li>• Promotion of new technologies and systems</li> <li>• Promotion of Internet access</li> </ul> <p>2000 Action Plan initiatives included:</p> <ul style="list-style-type: none"> <li>• Investment in human capital (e.g. equipment and training for schools and universities; investment in support instruments to assist in the spreading of knowledge)</li> <li>• E-government – making available online governmental information and services to Italian companies and citizens</li> <li>• Encouragement and facilitation of e-commerce</li> <li>• Infrastructure, competition and access</li> </ul>
Luxembourg	<ul style="list-style-type: none"> <li>• New information technologies were to be compulsory for all 9<sup>th</sup> and 10<sup>th</sup> grade students from 1986-87 year (CEC, 1989)</li> <li>• 1997 Cyberlycée, virtual online secondary school launched</li> <li>• Cyberprim, an online resource centre of pedagogical and didactical tools set up.</li> <li>• PC 'driving licence' available to pupils in year seven</li> <li>• Media 2000 programme provides computer and multimedia equipment to pupils in primary education</li> <li>• Public/private partnerships launched in 2001 (e.g. Higher Technological Institute and Hewlett Packard</li> </ul>	<ul style="list-style-type: none"> <li>• 1995 Ministry of Communications established the 'Info 2000 Committee. Issued two reports 1995 &amp; 1996 which proposed a series of initiatives</li> <li>• 1997 Information Society of Luxembourg established</li> <li>• 2000 'Luxembourg Offensive' to establish 'eLuxembourg'</li> </ul>	<ul style="list-style-type: none"> <li>• Interdepartmental Working Group on Information society set up 1995</li> <li>• 1998 Group set up to establish presence of government on Internet</li> <li>• 1998 RACE project set up to create administrative reform through electronic cooperation</li> <li>• 2000 Under 'Luxembourg Offensive' funding allocated to more access to internet for citizens; e-government (fully online administration by 2004); development of infrastructure (UMTS broadband network and third generation mobile telephony); adaptation of legal framework to information society</li> </ul>

State	Technology in the Education System	Information Society Strategy	Examples of Initiatives
Netherlands	<ul style="list-style-type: none"> <li>• Centre for Information Technology and Education set up 1980s to stimulate use of computers in schools</li> <li>• NIVO project set up 1985 associated with main computer companies to introduce new information technologies into lower, general and secondary schools</li> <li>• 1999 'Education On Line: Connection to the Future launched (Funding €04 for 1999-2002)</li> <li>• Kennisnet (Knowledge Net) Programme provides Internet service to groups and individuals seeking educational material. All students can be provided with email addresses through this network; aimed to have all schools, libraries, and museum connected by end 2001.</li> <li>• Management of ICT – Infrastructure programme (1999-2000) encourages partnerships between schools and local/regional authorities and companies in introducing and managing ICTs in schools.</li> <li>• Surfnets is a national electronic network of higher education and research institutions</li> </ul>	<ul style="list-style-type: none"> <li>• 1994 First national plan for Information Society 'Action programme for the Information Superhighways: from Metaphor to Action. Main concerns: liberalisation of telecommunications market; government to create favourable conditions in public sector.</li> <li>• 1995 Working Plan for the Information Superhighway – Vision on Acceleration.</li> <li>• 1997 White paper 'Taxes in the 21<sup>st</sup> Century: An investigation' proposed updating tax system to facilitate informational economy</li> <li>• 1998 'Beyond the NAP: re-calibration of the National Action Programme: Electronic Highways' launched.</li> <li>• 1999 Streamlining of policies through 'The Dutch Digital Delta: the Netherlands online'</li> </ul>	<ul style="list-style-type: none"> <li>• Investment in infrastructures and in decoders for television</li> <li>• 1997 Projects to develop the educational system to incorporate ICTs and provide citizens with access to the Internet through public access points.</li> <li>• Dutch Digital Delta initiatives include: supporting innovation, competition and investment in the telecommunications infrastructure; development of technical know-how; promotion of ICT clusters; improve access to information by citizens and companies; legislative reform; improve e-government; build confidence in the information society</li> </ul>
Portugal	<ul style="list-style-type: none"> <li>• 1985 National Minerva programme launched October 1985 – aimed to extend new information technologies to the second level sector</li> <li>• ICT Programme for Schools provided ICT equipment to 750 schools</li> <li>• First phase of RCU (University Communications Network) partnership between Portugal Telecom and Institute of Systems Engineering and Computers provided internet access to university students as well as school computer infrastructures</li> <li>• Internet na Escola initiative provided internet connection to all secondary schools since 1997</li> <li>• 2000 Prodep III initiative aims to provide one PC for every 12 pupils at secondary level and every 20 pupils at primary level</li> <li>• 2000 Internet initiative aims to have all schools connected to Internet by 2003 and promote high speed broadband connections</li> </ul>	<ul style="list-style-type: none"> <li>• 1996 'Mission for the Information Society' launched</li> <li>• 1997 'Green Paper for the Information Society in Portugal' identified political and technical measures to be taken (72 in total).</li> <li>• 1999 'White Paper on Scientific and Technological Policy for the years 1999-2006' launched strategy for Information Society (budget €1.35-1.45billion)</li> </ul>	<ul style="list-style-type: none"> <li>• 1997 Initiatives: <ul style="list-style-type: none"> <li>• Bringing technology to the masses (network linking R&amp;D institutions and universities; internet in schools; regulation of internet charges; computers for all initiative)</li> <li>• Creating digital cities</li> <li>• Promoting the digital economy</li> <li>• Increasing Portuguese content on the Internet</li> <li>• E Government and legal initiatives</li> </ul> </li> <li>• 1999 Initiatives <ul style="list-style-type: none"> <li>• Developing skills</li> <li>• Digital Portugal initiative</li> <li>• The Open State: Modernising State administration</li> <li>• Observation, monitoring and assessment of policy implementation</li> </ul> </li> </ul>
Spain	<ul style="list-style-type: none"> <li>• ATENEA project on new information technology in non-university education launched 1985.</li> <li>• Programme for New Information Technologies instituted by Ministry for Education Sport and Culture including: Aldea Digital programme introducing ICT to rural schools; Redes programme equips schools with intranets; multimedia material and equipment; connecting all schools to internet and email facilities; training in the use of ICTs in education</li> </ul>	<ul style="list-style-type: none"> <li>• Pre 1998 a number of actions from different ministries (e.g. PISTA 'Promotion and Identification of the Emerging Services in Advanced Telecommunications'; PN-TIC 'National Plan for ICTs</li> <li>• Regional Information Society strategies include Catalonia on the Network; Information Society Regional Strategy in Extramadura'</li> <li>• 1998 Information Society Forum established</li> <li>• 1999 Interministerial Commission of the Information Society and New Technologies set up to prepare inventory of initiatives planned or established (374 identified by March 2000)</li> <li>• 2000 'INFO XXI: Information Society for All' approved (€2.5billion government funding)</li> </ul>	<ul style="list-style-type: none"> <li>• 2000 Initiatives include: <ul style="list-style-type: none"> <li>• Infrastructure and networks (access to all citizens e.g. Access to all initiative which aims to provide internet connection to 3 million homes; deployment of wideband infrastructures)</li> <li>• Legal framework (regulations to facilitate ecommerce; telecommunications regulations; consumer protection; data protection)</li> <li>• Commitment to developing citizens' interests and promoting Information Society process in the industrial sector</li> <li>• Creating public awareness and support for ICT</li> </ul> </li> </ul>

State	Technology in the Education System	Information Society Strategy	Examples of Initiatives
Sweden	<ul style="list-style-type: none"> <li>1999-2000 it is (National programme for ICTs in Schools) with €185million budget supplied teachers with PCs, funded hi speed Internet connections in schools; provided email addresses to students and teacher; developed Schoolnet network.</li> <li>Funding for ICT in distance learning projects</li> <li>SUNET the Swedish university network coordinated by ASKen (funded by National Agency for Higher Education)</li> </ul>	<ul style="list-style-type: none"> <li>1994 First National Commission on IT set up</li> <li>1995 Second National Commission on IT</li> <li>1996 Third National Commission on IT</li> <li>1998 ICT Commission launched a number of initiatives 1996-1999</li> <li>2000 Bill 'Information Society for All' provided funding for IT action plan</li> </ul>	<ul style="list-style-type: none"> <li>1995 Commission prioritised legal system; education; the provision of information to the public at large</li> <li>1998 Commission initiatives include CultureNet Sweden to increase Swedish content on the Internet; 24X7 Government services to provide 24 hours service to citizens</li> <li>2000 Information Society for All Bill funded initiatives under the following headings: <ul style="list-style-type: none"> <li>Enhancing IT confidence: increased security</li> <li>Enhancing IT competence: IT programmes for small businesses and schools; launch of IT University; formation of competence centre for internet technology</li> <li>Increased IT accessibility: provision of backbone network to all urban centres; funding for regional connections; establishment of broadband programme; grants and tax relief to encourage use of high capacity networks in remote areas</li> <li>Other measures: e.g. development of e-business, e-healthcare etc.</li> </ul> </li> </ul>
United Kingdom	<ul style="list-style-type: none"> <li>Ratio of 1:95 'microprocessors' per pupil reported in 1989 (CEC, 1989)</li> <li>1995 Superhighway initiative involved 25 projects and 1000 schools</li> <li>National Grid for Learning (NGfL) 1998-2002 aims to provide high quality educational software to teachers and students through public/private partnerships (budget €1.138billion).</li> <li>Projects in England and Wales 'Laptops for Head Teachers' and 'Computers for Teachers'</li> <li>Wales ICT for Learning Strategy (budget €25.33million) aims to provide ICTs to students inside and outside school</li> <li>Northern Ireland Education Technology Strategy 1997 aims to provide all schools with ICT infrastructure</li> <li>Scotland has separate, but similar initiatives (e.g. National Grid for Learning in Scotland)</li> <li>City Learning Centres established to increase educational level among city children.</li> </ul>	<ul style="list-style-type: none"> <li>1995 First national ICT strategies launched in health and education sectors</li> <li>1996 Five year programme 'Information Society Initiative (ISI) launched (budget €58million)</li> <li>1997 'Our information age, the Government Vision</li> <li>2000 Series of regional (devolved government) strategies launched: Digital Scotland; Wales Information Society; Northern Ireland Information Age; UK online</li> </ul>	<ul style="list-style-type: none"> <li>ISI initiatives include 'IT for all' 1996 to promote ICT among businesses and the general public</li> <li>Our Information Age initiatives included <ul style="list-style-type: none"> <li>Transforming education and skills for the future (linking schools to the internet through the NGfL; an online virtual teacher centre established; University for Industry launched)</li> <li>Widening Access (provision of ICTs for libraries; development of 'IT for all' centres through public/private partnerships)</li> <li>Promotion of competition and competitiveness (Competition legislation; ISI local centres developed)</li> <li>Fostering quality (preventing undesirable content)</li> <li>Modernising government</li> </ul> </li> <li>2000 Initiatives aimed at: getting people online (provision of centres for training in disadvantaged communities; launch of Learndirect – online courses through the internet); getting businesses online; getting government online</li> </ul>

Source: Report prepared for the PICTURE Minerva Project 'The Digital Divide in Europe'; by Conor McCaffery, edited by Kay MacKeogh (McCaffery, 2003).

## 9.6 CONCLUSION

As this chapter has shown, there is much debate about the digital divide – does it exist, and even if it does, does it matter to educators and why? In an already unequal society, access to higher education is stratified on class, income and geographical grounds (Clancy, 2001). Is it the role of educators to redress structural inequalities and have they the capacity to do so? However, part of the original mission of ODL (or at least state funded ODL) was to redress unequal access. Through lower fees, open access policies and flexible presentation, adults were offered a ‘second chance’ to enter higher education. The data presented in this chapter confirm that access to technology is unequally distributed, and that a series of digital divides exist. Across Europe, access to technology is divided on the basis of income, occupation, class, educational attainment and geographical location. The danger is that by increasing the entry price to education through the requirement to have access to the Internet and a PC, as well as the skills to use the new technology, ODL institutions could lose their ‘market’ among the educationally disadvantaged while replacing it with a more affluent clientele of lifelong learners, interested in updating skills in the context of the Information Society. It may also be timely to recall Moran’s warning at a conference in 1990 to distance educators as they ‘bask in the glow of government favor’, risking ‘becoming so tightly gripped by this state-led notion of education as an economic and social tool that we are unable to tend to cultural and other social advantages of [distance education]’ (Moran, 1990).

This chapter has examined some of the strategies used by Member State governments to increase access to technology and promote positive attitudes among their citizens. However relatively few of these strategies focus on making home access to the Internet universally available. Despite two decades of investment, widescale disparities persist on the traditional lines of class, income, educational attainment and age. At the same time, the rationale for introducing technology into education is powerful. Technology can enhance flexibility, access, and quality of the educational experience for a wide range of learners, but the issue of access must be addressed if this potential is to be achieved (MacKeogh, 2001b). Moreover, as has been indicated in this chapter, the divide is not just about access to equipment. Successful adoption of new elearning approaches involves the identification and removal of a wide range of barriers, not just physical and technical, but also psychological and attitudinal (Eastin and LaRose, 2000; Rogers, 2001). Group statistics on access and other characteristics can mask a wide range of factors influencing individual decisions to participate and invest resources in education. The next chapter will tackle this issue from a student perspective.

## Chapter 10: How do EU Policies on ICTs and eLearning Resonate?

*The most important views on the relevance of social Europe are the views of European citizens themselves.* P. Flynn, Former EU Commissioner (Flynn, 1999: 318)

*We must be careful not to further increase the disparity in the accessibility of all levels of education through ICT. ICT has the potential to further disadvantage lower educated socio economic groups. Perhaps the EU can force national governments to wise up to this.* Male BA Student

*The interaction of students in a classroom environment enhances learning. Internet connection in Ireland is too slow and too costly to promote web-based learning. The EU might not always be committed to retaining the national identity of a country when implementing education policy.* Male MIT Student

### 10.1 INTRODUCTION

As previous chapters have demonstrated, the EU has enthusiastically promoted ICTs in education as one of the key pillars of its Information Society strategy. In parallel, the realisation has grown that while the supply of PCs in schools and educational institutions has expanded, the demand side, particularly from students, has not kept pace. In its guidelines for the Minerva Action in 1999, the EU Commission sought proposals aimed at ‘an understanding of the impact of ICT and/or ODL models on the organisation of learning/teaching and/or on the learning process as such’ (CEC, 1999b). Among the areas for research suggested was analysis of learners’ attitudes and profiles, including gender differences. The author was successful in obtaining funding for a two-year project entitled PICTURE.<sup>402</sup> This project involved three elements: a survey on attitudes to ICTs in European education; an analysis of the digital divide in Europe; and development and evaluation of pedagogical techniques to develop higher order thinking skills using virtual learning environments (Fox and Mac Keogh, 2001). This chapter poses the question ‘How do EU policies on ICTs and elearning resonate with students?’ In attempting to answer this question, the results of the survey of 751 students carried out by the author as part of the PICTURE project will be analysed in some detail.

Since the early 1970s, the EU has kept track of public opinion through its regular Eurobarometer surveys.<sup>403</sup> The first survey of attitudes to education and training was carried out in 1995: it revealed that 81% of those questioned believed that the new technologies would change education, and 76% believed that technology would improve the quality of education (Eurobarometer, 1997). Subsequent studies have surveyed the general population on attitudes to the Information Society. However, these surveys cover a cross-section of European citizens in general and do not focus on those intending to or actually engaged in learning. As this chapter will demonstrate, it is essential to tap into the views and attitudes of students in order develop fully informed policies on the introduction of technologies in education. While there is considerable research on attitudes of students to the use of various forms of technology in education, little attempt has been made to link these findings into the policy-making process, particularly at European level.

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<sup>402</sup> The PICTURE project (Perceptions of ICT Use in Remote Education). The project team comprised partners from Oscail – the National Distance Education Centre in Ireland, the Department of Psychology in Queen’s University Belfast, and the Danish Association of Open Universities. See <http://www.oscail.ie/academic/picture.php>

<sup>403</sup> Accessible at [http://europa.eu.int/comm/public\\_opinion/](http://europa.eu.int/comm/public_opinion/)



The chapter is divided into seven main sections. Section 10.2 discusses the methodology utilised in collecting the data. Section 10.3 describes the characteristics of respondents. Section 10.4 analyses access to technology. Section 10.5 focuses on respondents' expertise in using the technologies. Section 10.6 examines respondents' experience of using ICTs in education. Section 10.7 outlines the main findings on respondents' attitudes to ICTs in education. Section 10.8 discusses respondents' attitudes to the EU's involvement in educational policy. The chapter finishes with a summary and discussion of the findings.

## **10.2 METHODOLOGY**

### **10.2.1 THE TARGET GROUP**

Following consideration of a number of options, it was decided to select participants for the survey from students in the institutions involved in the PICTURE project. The primary reason for selecting this 'opportunity' sample was the logistical difficulty of selecting and accessing students in other institutions and other countries (Foster and Parker, 1995). This of course raises the issue of the representativeness of the responses received since it cannot be claimed that they represent the body of students in Europe. This thesis can only claim that the students selected are representative of the groups from which they are drawn. Some data provided by another Minerva funded survey on student perspectives on technology in teaching and learning (the SPOT+ survey) led by the ESIB – the National Unions of Students in Europe, will be used for comparative purposes where possible (SPOT+, 2003).

The target groups were drawn from five programmes of study, utilising two modes of study. The on-campus group comprised 119 first year students of Psychology in Queen's University, Belfast (referred to in this chapter as the 'on-campus group'). It was hoped to include a comparative group of on-campus students in the University of Aarhus, in Denmark, however, due to technical difficulties in administering the questionnaire, this group was eliminated from the analysis. The second group of students were 2,054 open distance learning (ODL) students with Oscail, the National Distance Education Centre. These students were enrolled in four programmes: 870 on the Bachelor of Arts (BA) programme (taking a combination of modules in History, Literature, Philosophy, Psychology, Sociology); 869 students taking the BSc in Information Technology (IT); 200 students taking the Bachelor of Nursing Studies (Nursing) – a programme aimed at topping up the qualifications of registered nurses to degree level; and 115 on the Master of Science (MIT) programme (with specialisms in Information Technology, Management of Operations, or Internet Systems). This combination of groups allowed the possibility of gauging attitudes to ICTs in European education of students from a number of perspectives: subject domain (Non-technical, Technical); mode of study (Distance, on-Campus); culture (Irish, UK), as well as the relationship between these attitudes and the characteristics of respondents (including gender, age, economic status, access to technology and expertise).

### **10.2.2 THE QUESTIONNAIRE**

It was decided that the most effective method of collecting data among the student groups was by means of a questionnaire. The primary objective of the questionnaire was to find out how students respond to the EU's policy of encouraging the use of ICTs in all levels of education. In order to build up a profile of students' attitudes, it was considered necessary to obtain data on different factors which might contribute to or explain the patterns of response. These elements might include barriers to the use of ICTs arising from the 'Digital Divide' or the 'Knowledge and expertise gap'; attitudes to computers in general as part of the

modernisation process; and knowledge of and attitudes to the EU role in society in general as well in education. Previous research on student attitudes to ICTs has shown that feelings of self-efficacy or confidence are key determinants in developing favourable attitudes to technology in education (Eastin and LaRose, 2000; Joo, et al., 2000; McMahon, 1997). In contrast relatively little research has been carried out on student attitudes to EU educational policy (Allington and Jones, 1994 carried out research on student attitudes to other EU policy areas).

The questionnaire<sup>404</sup> was divided into five sections, preceded by a short note outlining the purpose of the survey. The note was signed by the author in the case of Oscail students and by the local coordinators in Belfast and Aarhus, as it was considered that the name of a local sponsor would improve the response rate.

Section 1 comprised 42 questions concerning access to technologies. Questions 1 to 9 listed a number of technologies (based on Eurobarometer lists) and asked respondents to indicate where or if they could access these. Further questions concerned the quality of access. Questions 12 to 26 investigated the use which respondents had made of the Internet in the previous three months, including the location of access. Willingness and ability to pay for technologies, as well as who should be responsible for paying were explored in Questions 27 and 28.

Section 2 examined respondents' expertise in using ICTs. Questions 30-36 listed a series of activities (e.g. word processing etc) derived from a questionnaire developed for the SPOT+ project (SPOT+, 2002). A question on levels of computer training was included since it was considered that this could also be a contributory factor towards explaining computer efficacy. Respondents were also asked to indicate their involvement in a number of technology supported learning activities (the items were also derived from the SPOT+ questionnaire).

Section 3 comprised 40 Likert statements on attitudes to ICTs in education. These statements included twelve statements drawn from the SPOT+ questionnaire which related mainly to learning preferences for either traditional or technology based approaches. A further ten statements were drawn from McMahon's questionnaire which measured levels of confidence in utilising computers and attitudes to the value of ICTs (McMahon, 1997). Of the remaining statements, sixteen had been used in previous surveys to capture attitudes of ODL students to societal and pedagogical aspects of ICTs (see for example MacKeogh, 2001a). A further two statements were added to elicit views on the role of ICTs in the Information Society, as well as the use of ICTs in a European context. A further nine statements, drawn from the SPOT+ questionnaire probed the importance attached by respondents to a list of opportunities in education which might be enhanced by ICTs. Respondents were then asked to rank in order of preference their most preferred mode of study.

Attitudes to and knowledge of the EU were investigated in Section 4. A series of questions drawn from Eurobarometer surveys were used to explore levels of knowledge of various aspects of the EU as well as attitudes to the European project (e.g. integration, European currency). In view of the dearth of research on student attitudes to EU policy in education,

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<sup>404</sup> A copy of the questionnaire is included as Appendix 3 to this thesis.

further questions were specially designed to examine attitudes to EU involvement in the harmonisation of educational systems, teaching methods, curriculum, and funding.

The final section of the questionnaire comprised questions eliciting personal information including gender, nationality, economic status, location of residence and motivations for study

The questionnaire was circulated to twelve experts who were asked to review the questions for content validity, clarity and appropriateness. Five students were also asked to complete the questionnaire on a pilot basis and to provide feedback. Following this process, a number of changes were made to clarify statements and to remove redundant material.

Questionnaires were sent by post to all ODL students in October/November 2002. The questionnaire was accompanied by a letter requesting respondents to return the form using the enclosed reply paid envelope. While it would have been convenient to email the questionnaire to all ODL students, it was considered that the postal survey was the most appropriate as not all students access their email accounts, and the responses could be biased towards those who are more technically literate. This impression was validated by the problems encountered with the distribution of the questionnaire in the University of Aarhus. The lecturer posted the questionnaire on the Web and asked students to download the questionnaire and respond directly to the author by email. Unfortunately, the questionnaire was posted just before the Christmas break and the few students who accessed the site were unable to open the document. Two students emailed the author to alert her to this problem. On the other hand, the questionnaire was administered to the UK on-campus group in November 2002 during a scheduled class, when twenty minutes were set aside for completion. Questionnaires were collected by the lecturer at the end of the session and delivered to the author by hand.

Due to the different methods of questionnaire distribution, the response rates varied between ODL and on-campus students. All 119 on-campus student completed the questionnaire (100% response rate), whereas of the ODL students who received the questionnaire by post, some 299 (34.4%) BA students, 39 (33.9%) MIT students, 59 (29.5%) Nursing students and 235 (27.0%) of IT students responded. Just two responses were received from Danish students. Postal surveys, while having a number of advantages, also pose the problem of low response rates (Baruch, 1999). It is rare to achieve a 100% response rate and non-responses may be due to a number of factors including non-delivery, timing, relevance of the topic to the respondent, or even survey weariness on the part of over-surveyed respondents. Baruch notes that response rates have declined over a twenty year period, with the average response rate reported in a number of academic journals in 1995 being 48.4% (Standard Deviation 22.5) compared with 64.4% in 1975 (Standard Deviation 16.8) (Baruch, 1999: 430). Normally, evaluation questionnaires mailed to Oscail students achieve response rates of between 40-60%. An earlier survey of attitudes to technology carried out in Spring 2000 achieved a response rate of 58.5% (MacKeogh, 2001a).

A reminder was sent by email to all ODL students however, since questionnaires were not linked with respondents it was not possible to target non-respondents. It is clear that the length of the questionnaire, combined with the time of distribution in the examination preparation period were major factors in reducing the response rate. Some comments from students included: 'The questionnaire is too long'. 'Sorry not much time at the moment.

Preparing for my final exams.’ ‘Timing of this survey was ridiculous - middle of exams!’ One Danish student sent the following email message:

I would have liked to participate, but I find this questionnaire rather hard to get a general view over. It is not very user friendly in my opinion. It could for some reason not readily be saved as a word document. My impression from looking down over the pages was: "My God, this is a massive block of text, it will take me hours to complete. No thanks, I don't have time for that.

According to Baruch, there is no agreed norm as to what constitutes an acceptable response rate (Baruch, 1999: 422). Researchers normally compare the demographic characteristics of respondents with that of the population and where these do not vary, they claim that the findings are likely to hold true for the total population. Since the gender and age breakdown of ODL respondents reflects that of the total population the response can be considered to be reasonably representative of the ODL student body in Oscail. Because of the problems outlined above with regard to administering the Danish questionnaire, just two responses were received and these were eliminated from the analysis. In total some 751 usable responses were received which represents an acceptably large sample for analysis. The SPOT+ survey team made available frequencies for the questionnaire which was administered via the web to students throughout Europe in 2002 and which achieved a final response of 1,998 (SPOT+, 2003). These data will be referred to later in the chapter.

### **10.2.3 ANALYSIS**

With the exception of a small number of open-ended questions, the responses were precoded for ease of data entry. The data, including comments, were first entered on to an Excel spreadsheet. Following checking and correction, the data were then uploaded onto SPSS, Version 11.0 for statistical analysis.

## **10.3 PROFILE OF RESPONDENTS**

The characteristics of respondents vary significantly between programmes, as demonstrated in Table 10.1 below. As would be expected, women predominate in non-technical programmes (both on-campus and ODL), comprising 98.3% of nursing respondents, 70.1% of BA respondents and 84.0% of on-campus respondents. In contrast, some 71.7% of IT and 69.2% of MIT respondents are male.

The age profile of respondents also varies between programmes. BA respondents tend to be older than any of the other groups, with almost one quarter (23.3%) aged over 50 years and just 12.0% aged under 30 years. In contrast, just 5.2% of IT respondents are aged over 50 years, and some 28.9% are aged under 30 years. The nursing group cluster into the 30-50 age group (84.4%) with none over 50 years. One third (33.3%) of MIT respondents are aged under 30 years. The on-campus group are, not unexpectedly in respect of full-time students, concentrated into the 18-22 age group, with just 13.4% aged over 23 years.

Over half (53.6%) of all respondents are married, and over one third (36%) are single. However, this varies by programme, with just 5% of on-campus students being married compared with in the region of two thirds of BA, IT and Nursing students.

As would be expected almost all (94.2%) ODL respondents reported their nationality as Irish, with 3.9% from the UK. The response from the on-campus students, located in Northern Ireland is interesting in that respondents are split between UK (52.8%) and Irish

(47.2%) perhaps reflecting their cultural, religious and/or political affiliations, although it is not possible to deduce from responses how many 'Irish' respondents were from Northern Ireland or had come from the Irish Republic.

Respondents were asked to indicate their primary motivation for studying. Four options were given: personal interest; to prepare for a career; to change current career; and to upgrade qualifications. The responses related to career were combined into one category. Motivation for study varied substantially between programmes. Over half (56.3%) of BA respondents listed personal interest as primary motivation, compared with less than one tenth (8.8%) of nursing respondents, under one fifth of IT (19.6%) and MIT (19.4%) respondents, and just over one quarter (27.0%) of on-campus respondents. On-campus respondents were primarily motivated by career objectives (72.2%), while Nursing, IT and MIT respondents were more motivated by obtaining or upgrading qualifications (75.4%, 61.1% and 48.4% respectively). With regard to previous highest level of education, as would be expected, only 11.8% of on-campus students had completed post-second level education. Of the other groups, over half (56.2%) of BA and almost three quarters of IT (70.3%) respondents had some form of post-second level education. All Nursing and MIT respondents had completed post-second level qualifications.

The economic status of respondents varies between programmes. Even though the on-campus students are studying full-time, almost one quarter (23.5%) were in employment. BA respondents were less likely to be in the paid workforce (71.3%) than other ODL respondents (91.0% IT; 96.6% Nursing; 92.3% MIT). Data on annual income should be treated with some caution as it is not clear if some respondents interpreted the question as relating to their own personal income, or to the household income. Nevertheless, differences emerge between programmes, with most (92.3%) on-campus respondents reporting an annual income of less than €15,000. Almost one quarter (23.6%) of BA respondents report a similar income, although this more likely reflects the comparatively high proportion of this group who are not in the paid workforce. Almost three quarters (72.2%) of MIT respondents earn over €40,000 compared with 39.7% of IT respondents, 24.7% of BA and just 15.5% of nursing respondents.

**Table 10.1: Profile of Respondents by Programme**

Variable	Label	% ODL - BA	% ODL - IT	% ODL - Nursing	% ODL - MIT	% On- campus Psycholog y	Total %	N	$\chi^2$	DF	Sig
Gender	Male	29.9	71.7	1.7	69.2	16.0	40.6	302	187.405	4	0.000
	Female	70.1	28.3	98.3	30.8	84.0	59.4	442			
Age Group	18-22		0.4			86.6	14.0	104	724.667	20	0.000
	23-30	12.0	28.9	15.5	33.3	7.6	17.9	133			
	31-40	31.5	45.9	53.4	33.3	4.2	33.5	248			
	41-50	33.2	19.7	31.0	28.2	0.8	23.3	173			
	51-60	15.1	5.2		5.1	0.8	8.0	59			
	60+	8.2					3.2	24			
Marital status	Single	21.2	30.0	20.3	35.9	91.6	36.0	266	209.465	16	0.000
	Cohabiting	6.2	7.0	6.8	10.3	3.4	6.2	46			
	Married	65.4	60.9	67.8	48.7	5.0	53.6	396			
	Separated/divorced	4.5	2.2	3.4	2.6		2.8	21			
	Other	2.7		1.7	2.6		1.4	10			
Nationality	Irish	94.2	94.0	91.7	100.0	52.8	87.1	548	179.296	8	0.000
	UK	3.9	2.7	6.3		47.2	11.0	69			
	Other	1.9	3.3	2.1			1.9	12			
Motivation for study	Personal interest	56.3	19.6	8.8	19.4	27.0	34.4	247	253.826	8	0.000
	Career reasons	28.2	32.0	15.8	19.4	72.2	35.0	251			
	Qualification	15.5	48.4	75.4	61.1	0.9	30.5	219			
Previous highest level of education	2nd level - Part	10.2	7.9	1.7	2.6	4.2	7.4	55	463.546	24	0.000
	2nd level	33.6	21.8	5.1		84.0	34.1	252			
	Cert/Diploma	34.9	53.7	27.1	10.5	10.9	35.0	259			
	Bachelor's degree	8.5	7.9	3.4	52.6	0.8	8.9	66			
	Postgraduate	2.7	2.6	1.7	10.5		2.6	19			
	Professional	10.2	3.5	61.0	23.7		11.2	83			
	Other		2.6				0.8	6			
Economic Status	Student	1.4	0.4			76.5	12.9	96	565.649	12	0.000
	Employed	71.3	91.0	96.6	92.3	23.5	72.9	542			
	Home maker	15.4	3.4	1.7	2.6		7.4	55			
	Other	11.9	5.2	1.7	5.1		6.7	50			
Annual income	>15K	23.6	5.9	6.9	2.8	92.3	24.6	166	367.317	20	0.000
	15-25	20.3	16.4	8.6	5.6	4.4	15.1	102			
	25-40	31.4	47.9	69.0	19.4	2.2	35.4	239			
	40-60	16.6	26.5	15.5	50.0	1.1	19.4	131			
	60-85	5.5	2.7		19.4		4.1	28			
	85+	2.6	0.5		2.8		1.3	9			
Location of main residence	Metropolitan	30.7	35.1	27.1	21.1	24.1	30.2	220	28.126	8	0.000
	Urban	30.3	35.5	28.8	42.1	53.4	36.1	263			
	Rural	39.0	29.4	44.1	36.8	22.4	33.7	245			
Distance of main residence from campus	0-5mls	17.9	24.7	15.5	7.9	53.4	25.0	184	117.312	20	0.000
	6-10mls	18.6	20.3	20.7	21.1	15.3	18.9	139			
	11-20 mls	13.4	18.2	8.6	15.8	11.0	14.3	105			
	21-50 mls	19.6	22.1	17.2	26.3	13.6	19.6	144			
	51-100 mls	21.6	5.6	25.9	5.3	4.2	13.3	98			
	100+ mls	8.9	9.1	12.1	23.7	2.5	9.0	66			



Respondents were asked to indicate the location of their main residence, using categories from Eurobarometer surveys (metropolitan area - population over 1 million; non-metropolitan urban area; rural area). Respondents were relatively evenly distributed between the three types of area, although nursing respondents were twice as likely to reside in rural areas than on-campus students (44.1% of nursing compared with 22.4% of on-campus respondents). Data on residence for on-campus students should be treated with some caution as some students may have been confused as to whether their main residence was their term-time residence or their parents' residence. While this point was clarified during the session when the questionnaires were completed, it is possible that some respondents may not have heard the clarification. Finally, respondents were asked to indicate the distance from the university campus to their main residence. Over half (53.4%) of on-campus residents indicated they lived within five miles of the campus (again the caveat about how they interpreted this question must be applied). With regard to the ODL students, it may be surprising to note the proportion who live within five miles of the campus (24.7% of IT; 17.9% of BA; 15.5% of Nursing; 7.9% of MIT). However, substantial proportions live over fifty miles from the campus (38.0% of Nursing 30.5% of BA; 29.0% of MIT; 15.7% of IT).

In summary, respondents may be classified into three main groups: ODL technical, comprising largely male students, aged between 23 and 40, in employment, taking IT courses to improve their qualifications; ODL non-technical, comprising mostly female students, aged between 30 and 50, taking humanities courses largely for personal interest, or nursing courses to improve their qualifications; and on-campus non-technical, comprising mostly female students, aged under 23 years, taking a psychology degree, motivated by career objectives.

In the next section, data on access to technologies, expertise and experience of technologies will be analysed, before turning to an examination of attitudes to technology.

## **10.4 ACCESS TO ICTs IN EDUCATION**

*It is important to be able to study when unable to access the web because of poor connection speeds and need to share access to computing resources. The volume of course materials and textbooks requires continued use of written course materials in order not to deprive others of equal opportunity [by requiring] use of computer. Male MIT Student*

### **10.4.1 ACCESS TO A RANGE OF TECHNOLOGIES**

Respondents were asked to indicate whether they had access to a list of nine technologies (Desktop PC, Laptop computer, CD-ROM drive, Internet connection, Fax, Digital TV, ISDN line, DVD Player and mobile phone). They were asked to indicate where these technologies could be accessed (no access; home only; university only; work only; other place only; or a combination of these options). While a number of respondents indicated that they had no access to PCs or the Internet, in fact, all students are provided with access on-campus, even though, especially for ODL students, it may not be possible to travel to the campus. Following analysis of frequencies, it was decided to combine the figures for desktop PCs and laptop computers into one measure. The sites of access were recoded into three categories (minimal access: university/other location e.g. work or public library; restricted access: home and university; and extensive access: home, university and work). As Table 10.2 shows, home access to PCs and the Internet is high, with less than 7% relying solely on university access for PCs, and a further 15.8% relying on the university for access

to the Internet. While the figures indicate that access to PCs remains a problem for a small minority of students, access to the Internet is more restricted in that just 39.1% have extensive access (home/university/work) compared with 45.1% with more restricted access (home/university). Analysis of the other technologies listed shows that home access to CD-ROMs is extensive (91.6%), however, just over one third (38.6%) have access to digital TV at home, over one quarter (26.2%) have access to fax, and just 16% report having an ISDN line at home. It should be noted that the non-response rate to the latter technologies renders interpretation problematic.

**Table 10.2: Access to Selected Technologies by Quality of Access**

Access to:	Minimal Access University or other location		Restricted Access Home + University		Maximum Access Home + University + Work		Total	No info
	N	%	N	%	N	%		
Desktop PC	51	6.8	299	39.8	401	53.4	751	0
Internet	114	15.8	325	45.1	282	39.1	721	30

	No Access at Home		Home		Home + Work		Total	No Info
	N	%	N	%	N	%		
CD-ROM	58	8.4	303	44.0	327	47.5	688	63
Digital TV	384	61.4	220	35.2	21	3.4	625	126
FAX	478	73.8	71	11.0	99	15.3	648	103
ISDN	451	84.0	55	10.2	31	5.8	537	214
DVD Player	243	38.3	329	51.8	63	9.9	635	116

	No mobile phone		Mobile Phone		Mobile Phone with Blue Tooth/Infra Red		Total	No Info
	N	%	N	%	N	%		
Mobile Phone	51	7.2	537	75.7	121	17.1	709	42

It is apparent from examination of the non-responses that some respondents were not familiar with the technology. As one female BA respondent wrote 'It's difficult to answer questions about equipment I do not own and have never used'. As can be seen, ownership of mobile phones is now ubiquitous with just 7.2% reporting that they did not own one. Interestingly, just one student from the on-campus group did not have a phone. Another factor of interest in view of speculation on the future direction of mobile computing is the relatively small proportion (17.1%) who report that their mobile phones have Infra red access to the Internet. Again, it was apparent from the responses that some respondents were not sure whether their phone had these features or not. In the next section, we will look further into access to the Internet to establish if there are any differential patterns of access.

#### 10.4.2 ACCESS TO PCs AND THE INTERNET BY PROGRAMME

The data on access to PCs and the Internet were further analysed by cross-tabulating by programme of study, as well as personal characteristics: gender, age, previous highest level of education and economic status. Table 10.3 shows that the distribution of PCs and Internet access varies significantly by programme, with distance education students taking technical qualifications reporting most extensive access to both.

Over three quarters of IT students (78.7%) compared with just under half (46.5%) of BA students report extensive access to PCs. Four fifths (84%) of on-campus students report restricted access. However, access to the Internet is less ubiquitous than would be required for courses delivered on the web and utilising Internet based virtual learning environments, especially for off-campus students. Almost one in five (18.1%) BA students report only having access to the Internet in the university, and just one third (33.8%) have extensive

access. It may be surprising that even technology students report relatively restricted access to the Internet. Just over one half of IT students (59.2%) have extensive access. From anecdotal evidence, restrictions on access at work are increasing due to the creation of firewalls by company IT departments to prevent hackers and viruses attacking the company system. Four out of ten on-campus students have access to the Internet at the university and home, with 15.4% relying solely on the university for access.

**Table 10.3: Access to PCs and Internet by Programme**

Programme of Study		Minimal Access University or other location		Restricted Access Home + University		Extensive Access Home + University + Work		Total		$\chi^2$	
		N	%	N	%	N	%	N	%		
Access to Desktop PC	BA	27	9.0	133	44.5	139	46.5	299	100	$\chi^2$	184.879
	IT	7	3.0	43	18.3	185	78.7	235	100	DF	8
	Nursing	4	6.8	18	30.5	37	62.7	59	100	Sig	0.000
	MIT	4	10.3	5	12.8	30	76.9	39	100		
	On-campus	9	7.6	100	84.0	10	8.4	119	100		
	Total	51	6.8	299	39.8	401	53.4	751	100		
Access to Internet	BA	51	18.1	135	48.0	95	33.8	281	100	$\chi^2$	124.491
	IT	30	13.2	63	27.6	135	59.2	228	100	DF	8
	Nursing	7	12.5	26	46.4	23	41.1	56	100	Sig	0.000
	MIT	8	20.5	7	17.9	24	61.5	39	100		
	On-campus	18	15.4	94	80.3	5	4.3	117	100		
	Total	114	15.8	325	45.1	282	39.1	721	100		

Besides establishing if students have access to the technologies required for elearning, it is also important to establish the quality of that access. Aspects of quality include the level of flexibility in terms of hours of use, or in the case of on-campus access, the number of PCs per student and opening hours. ODL respondents were asked to indicate, if they were in paid employment, the extent to which their employer would allow them to use work-based PCs for educational purposes. On-campus students were asked to indicate if they experienced restrictions on access to PCs in the university. The responses are summarised on Table 10.4.

**Table 10.4: Quality of access to PCs by Programme**

Quality of Access to PCs for educational purposes at work									
Programme/ mode	No work access		Access during working hours		Access after working hours		No restrictions on access at work		Total
	N	%	N	%	N	%	N	%	N
ODL student									
BA	143	52.2	8	2.9	78	28.5	45	16.4	274
IT	58	25.4	6	2.6	111	48.7	53	23.2	228
Nursing	16	28.1	5	8.8	23	40.4	13	22.8	57
MIT	6	15.4	0	0.0	24	61.5	9	23.1	39
Quality of Access to PCs for educational purposes at University									
On-campus	Time restricted/not enough PCs				Time restricted/enough PCs		No Access Problems		Total
	N	%	N	%	N	%	N	%	N
Psychology	48	41.4	48	41.4	20	17.2	116	100.0	

As Table 10.4 demonstrates, access to technology does not necessarily imply that access is unconditional. Less than half (47.8%) of BA students can access work-based computers for educational purposes, compared with almost three quarters of undergraduate IT students (74.6%). However, even where employers permit the use of work PCs most respondents experience restrictions with usage limited to outside working hours. Of all respondents permitted to use PCs at work, 62.9% were allowed to use them after working hours only;

5.1% could use them during working hours only, and 32% had no restrictions with regard to time of access. Less than one quarter of all IT undergraduates (23.2%) were permitted to use work PCs without restrictions, compared with 16.4% of all BA undergraduates. One ODL respondent wrote:

*My job has a strict use of work of computer policy. I can study paper-based material in work before/after work or at lunchtime. PC based learning would be less flexible for me. I also find that using PC for Internet searches/printing off printer etc can be very time consuming decreasing the limited time I have available for study. If [presented] solely PC based I might discontinue my Oscail studies.* Male BA respondent.

It is interesting to note that four out of five (82.8%) on-campus students report restrictions in accessing PCs on campus. Two fifths (41.4%) report that opening times are restricted, but there are generally enough PCs. However, another two fifths (41.4%) experienced not only restricted opening times, but also agreed that there were sometimes not enough PCs available. These figures indicate that universal access by students to 'always on', available anytime technology is still to be achieved.

### 10.4.3 ACCESS TO PCs AT HOME

*I think it is not a good idea to base substantial amounts of course learning on computers. It is difficult to access them - they easily breakdown 'crash', often web pages are unavailable, internet costs at home are relatively high so unable to use internet.* Male On-campus Student

The fact that a relatively small proportion of respondents have unrestricted access to technology during their working or study day is of concern. However, as has been shown above, 92.2% of respondents stated that they had access to a PC at home. It was considered useful to complement the data on work/university access with similar details on home access. asked to indicate their level of access to the household PC. The findings are summarised in Table 10.5.

**Table 10.5: Quality of access to PCs at Home by Programme**

Programme/ mode	No PC at Home		Owns PC – no access issues		Shares PC but access when required		Shares PC – problems in gaining access		Total	
	N	%	N	%	N	%	N	%	N	%
BA	27	9.2	66	22.4	175	59.5	26	8.8	294	100.0
IT	7	3.0	82	35.2	139	59.7	5	2.1	233	100.0
ODL Nursing	4	6.8	14	23.7	38	64.4	3	5.1	59	100.0
MIT	4	10.5	10	26.3	22	57.9	2	5.3	38	100.0
On-campus	7	5.9	21	17.6	86	72.3	5	4.2	119	100.0
Total	49	6.6	193	26.0	460	61.9	41	5.5	743	100.0

Just over one quarter (26%) of respondents reported that they owned a PC which they did not share with anyone else in the household, whereas just over two thirds (67.4%) shared with others in the household. However, just 5.5% reported that they had difficulties in accessing the PC, while 61.9% had no problems in accessing a shared computer as required. The pattern of access varies somewhat between disciplines. As would be expected undergraduate students of IT report higher ownership of PCs (35.2% of IT respondents compared with 22.4% of BA respondents own a PC). BA students are slightly more likely to experience difficulties in accessing a shared PC (8.8% compared with 2.1% of IT students). This figure when added to the 9.2% who do not have a PC at home indicates that almost one in five BA students (18%) compared with just 5.1% of IT students would experience difficulties in meeting the technology requirements for elearning courses. In addition, the comment of one ODL respondent about home access deserves consideration

*Paper based course notes are generally better than using a PC to learn. Most home PCs are located in bedrooms with minimal work space and bad ergonomic set ups. Long study hours at a PC can be painful.*

#### 10.4.4 ACCESS TO PCs AND INTERNET BY GENDER

When access to PCs and the Internet is cross-tabulated by gender, significant variations emerge. While similar proportions of men and women report minimal access to both PCs and Internet, it is apparent that in both cases, men are more likely than women to have extensive access to the technologies (see Table 10.6). Almost two thirds of men (64.9%) compared with less than half of women (45.5%) have extensive access to PCs; just under one half of men (49.3%) and under one third of women (31.8%) have extensive access to the Internet. Further analysis of household access by gender shows that, almost one third of men (30.3%), compared with just over one fifth (22.8%) of women own the PC, while the remainder share with partners, children or other adults in the household. Slightly more women report difficulties in gaining access to the shared PC (6.6% of women compared with 4.4% of men).

**Table 10.6: Access to PCs and Internet by Gender**

		Minimal Access University or other location		Restricted Access Home + University		Extensive Access Home + University + Work		Total		$\chi^2$	
		N	%	N	%	N	%	N	%		
Access to Desktop PC	Male	22	7.3	84	27.8	196	64.9	302	100	$\chi^2$	31.133
	Female	29	6.6	212	48.0	201	45.5	442	100	DF	2
	Total	51	6.9	296	39.8	397	53.4	744	100	Sig	0.000
Access to Internet	Male	46	15.8	102	34.9	144	49.3	292	100	$\chi^2$	25.007
	Female	68	16.1	220	52.1	134	31.8	422	100	DF	2
	Total	114	16.0	322	45.1	278	38.9	714	100	Sig	0.000
Quality of access to Home PC by Gender		No PC at Home		Owns PC		Shares – no access problems		Shares – problems in access		N	%
		Male		6.7		30.3		58.6		297	100.0
		Female		6.6		22.8		64.2		439	100.0

#### 10.4.5 ACCESS TO PCs AND INTERNET BY AGE

*Being of the older age group, I find it difficult to use modern technology. I have a personal computer which I use mainly as a word processor. I prefer to use libraries to source material for assignments. However I see the role of technology in education as the way forward in this age where people seem to have less time to spend in browsing and reading books.* Female BA Respondent.

Examination of Table 10.7 reveals that there are significant differences in access to PCs and Internet related to age. Access declines steeply among the older age groups. Almost 95% of the 18-22 age group (i.e. largely drawn from the on-campus group) have relatively unrestricted access to PCs, and 85% have similar access to the Internet at university and home. In the region of two thirds of the 23-50 age group have extensive access to PCs, and just under one half have similar access to the Internet. However, the over 50 age group experiences more restricted access, with one fifth of those over 60 accessing PCs at the university only and 30% accessing the Internet only through the university. These figures are of relevance in the context of promoting ICTs for lifelong learning.

**Table 10.7: Access to PCs and Internet by Age**

Age Group		Minimal Access		Restricted Access		Extensive Access		Total		$\chi^2$	
		University or other location		Home + University		Home + University + Work					
		N	%	N	%	N	%	N			
Access to Desktop PC	18-22	6	5.8	88	84.6	10	9.6	104	100	$\chi^2$	154.68
	23-30	14	10.5	34	25.6	85	63.9	133	100	DF	10
	31-40	12	4.8	67	27.0	169	68.1	248	100	Sig	0.000
	41-50	11	6.4	57	32.9	105	60.7	173	100		
	51-60	3	5.1	32	54.2	24	40.7	59	100		
	60+	5	20.8	17	70.8	2	8.3	24	100		
	Total	51	6.9	295	39.8	395	53.3	741	100		
Access to Internet	18-22	13	12.6	85	82.5	5	4.9	103	100	$\chi^2$	100.97
	23-30	31	23.5	42	31.8	59	44.7	132	100	DF	10
	31-40	39	16.5	81	34.3	116	49.2	236	100	Sig	0.000
	41-50	16	9.7	74	44.8	75	45.5	165	100		
	51-60	9	16.4	27	49.1	19	34.5	55	100		
	60+	6	30.0	12	60.0	2	10.0	20	100		
	Total	114	16.0	321	45.1	276	38.8	711	100		

#### 10.4.6 ACCESS TO PCs AND INTERNET BY EDUCATION

An analysis of Table 10.8 shows that access to PCs and Internet varies significantly by educational level. As the figures for those with second level prior qualifications are skewed by the presence of on-campus students, most of whom are not working and who have completed second level education only, on-campus students have been excluded from the analysis. Of the ODL respondents, those with second level education are more likely to experience restricted access, while graduates experience the highest levels of access. Over two thirds (69.7%) of graduates have extensive access to PCs and half have extensive access to the Internet compared with approximately half of students with second level education who have access to PCs and just over one third who have access to the Internet.

**Table 10.8: Access to PCs and Internet by Prior Education Status of ODL Respondents**

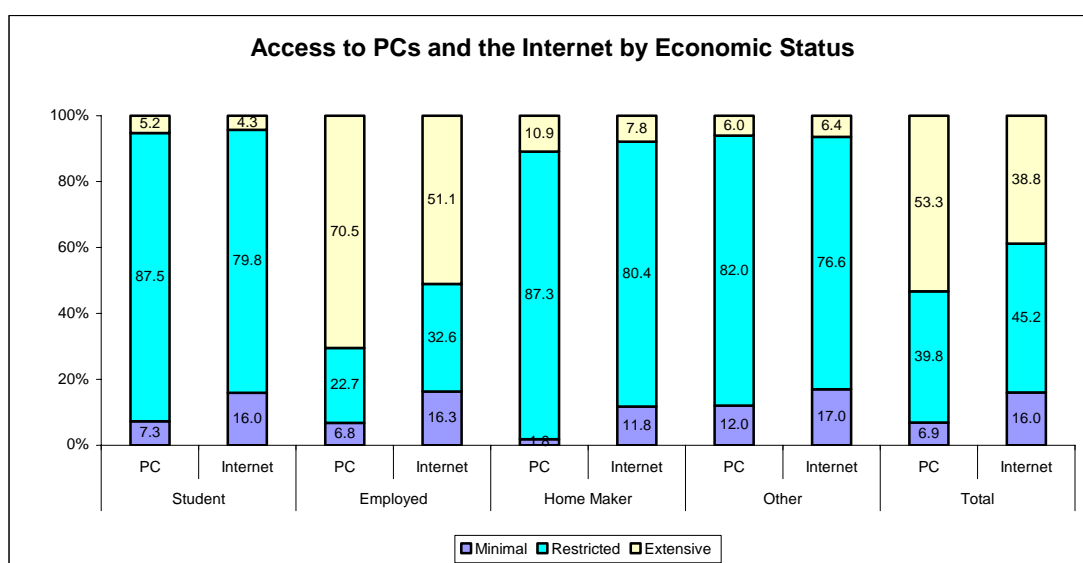
Previous highest level of education		Minimal Access		Restricted Access		Extensive Access		Total		$\chi^2$	
		University or other location		Home + University		Home + University + Work					
		N	%	N	%	N	%	N			
Access to Desktop PC	2nd level - Part	6	12.0	19	38.0	25	50.0	50	100.0	$\chi^2$	83.31
	2nd level	9	5.9	64	42.1	79	52.0	152	100.0	DF	12
	Cert/Diploma	11	4.2	76	29.3	172	66.4	259	100.0	Sig	0.000
	Bachelor's degree	9	13.6	11	16.7	46	69.7	66	100.0		
	Postgraduate	3	15.8	3	15.8	13	68.4	19	100.0		
	Professional	5	6.0	30	36.1	48	57.8	83	100.0		
	Other		0.0	1	16.7	5	83.3	6	100.0		
	Total	43	6.8	204	32.1	388	61.1	635	100.0		
Access to Internet	2nd level - Part	9	20.0	19	42.2	17	37.8	45	100.0	$\chi^2$	88.45
	2nd level	17	11.7	77	53.1	51	35.2	145	100.0	DF	12
	Cert/Diploma	40	15.9	81	32.1	131	52.0	252	100.0	Sig	0.000
	Bachelor's degree	19	28.8	14	21.2	33	50.0	66	100.0		
	Postgraduate	3	17.6	4	23.5	10	58.8	17	100.0		
	Professional	14	18.2	35	45.5	28	36.4	77	100.0		
	Other		0.0	1	16.7	5	83.3	6	100.0		
	Total	102	16.8	231	38.0	275	45.2	608	100.0		



## 10.4.7 ACCESS TO PCs AND THE INTERNET BY ECONOMIC STATUS

The relationship between economic status and access to PCs and the Internet is illustrated graphically in Figure 10.1. As would be expected, those in employment have the greatest access to the technology (70.5% have extensive access). However, it is also interesting to note that almost all (98.2%) home-makers have access to PCs at home and that 88.2% have home access to the Internet. This would indicate that for this group, given that they are at home during the day, access to PCs and Internet should not pose a barrier to participation in elearning. However, access is more restricted among the ‘other’ category (unemployed and retired) with 17% restricted to accessing the Internet in the university.

**Figure 10.1: Access to PCs and the Internet by Economic Status**



## 10.5 EXPERTISE IN ICTs

### 10.5.1 EXPERTISE IN USING ICTs

*Sometimes I feel at a disadvantage because I am not really computer literate and taking courses is very time consuming and expensive i.e. I still cannot manage to send or receive attachments and I had to get a typist to print my assignment even though I have Microsoft word.* Female BA respondent.

While the previous findings have established that a small minority of respondents have difficulty in accessing the technology, it is important to establish the extent to which respondents can use the technology. Respondents were asked to indicate their level of skill in exercising a number of key functions which are an essential part of the toolkit for effective utilisation of the ICTs in education. Table 10.9 shows that almost all respondents (93.7%) expressed confidence that they could use an Internet browser to look up a specific website unaided. There was slightly less confidence in ability to use email to send messages and attached files unaided (88.1%) and wordprocessing (87.7%) to type up a well-formatted essay or report, using tables and figures. Approximately two thirds could use spreadsheets (68.3%) and search bibliographic databases (62.8%). Just over half (53.5%) could use presentation software to create a short talk with computer projected images; however, less than a quarter (22.7%) could participate in an online computer conference, interacting with

other students and tutors. From these results it appears that respondents have some of the basic skills required for use of PCs but further training and support would be needed to ensure that they can cope with new technologies in education.

**Table 10.9: Expertise in using ICT functions**

Function/Task Description	Can do this unaided		Would need help		Have never done this		Total
	N	%	N	%	N	%	N
Internet browser: e.g. use Netscape or Internet Explorer to look up a specific website	697	93.7	32	4.3	15	2.0	744
Email: Send messages, attach files	652	88.1	59	8.0	29	3.9	740
Wordprocessor: type a well formatted essay or report, using tables and figures	655	87.7	69	9.2	23	3.1	747
Spreadsheet: enter data, sort, filter, calculate	506	68.3	145	19.6	90	12.1	741
Bibliographic database: use online database to search publication	466	62.8	185	24.9	91	12.3	742
Presentation manager: create a short talk using e.g. PowerPoint	397	53.5	149	20.1	196	26.4	742
Computer conferencing: interact with other students and tutors in an online conference	168	22.7	212	28.7	359	48.6	739

## 10.5.2 TRAINING IN COMPUTER SKILLS

*Technology in education has provided opportunities for me for further education that would otherwise have been very difficult due to living in a rural setting, with no work access to a medical/nursing library. I did the ECDL in preparation for my studies and also bought a computer, both expensive but certainly necessary and in the long term an investment due to typing/presentation skills and access to online libraries.* ODL Nursing Respondent

*I think that older people taking part in a 'Distance Education programme' should not have to try to learn computer skills as well. I am computer literate, but for many in my class they would be seriously disadvantaged without computer skills and I feel it would put them off enrolling for 'Distance Learning'. I prefer face to face tutorials with hard copies of my course notes.* Female BA Respondent

Respondents were asked to state the type of computer training, if any, they had received. The question was not precoded, however respondents were offered prompts (e.g. none, largely self taught, ECDL, short training courses, certificate/diploma/degree qualifications etc). The 709 usable responses received were categorised into three main groups (no formal training, the European Computer Driving Licence (ECDL) and 'other'). Over 40% of respondents stated they had no formal training in computers (35.5% described themselves as 'self-taught' while 6.3% said they had no training at all). Of the 42.6% who had taken some type of course, 31.6% had followed a range of short courses and 11.0% had taken degree/diploma programmes which included IT. It is interesting to note that 15.5% had taken the ECDL as Ireland has a relatively high takeup of this qualification vis-à-vis other countries (McCaffery, 2003).

The levels of training received are analysed further by programme, gender, age, and economic status in Table 10.10 below.

**Table 10.10: Levels of ICT Training by Programme, Gender, Age, and Economic Status**

			No formal training		ECDL		Other		Total
			N	%	N	%	N	%	
Programme	ODL	BA	136	48.2	58	20.6	88	31.2	282
		IT	79	35.3	34	15.2	111	49.6	224
		Nursing	26	46.4	11	19.6	19	33.9	56
		MIT	23	59.0	3	7.7	13	33.3	39
	On-campus	Psy	33	30.6	4	3.7	71	65.7	108
Gender	Male		139	48.3	34	11.8	115	39.9	288
	Female		157	37.7	73	17.5	186	44.7	416
Age Group	18-22		31	32.3	2	2.1	63	65.6	96
	23-30		54	43.2	20	16.0	51	40.8	125
	31-40		101	42.4	41	17.2	96	40.3	238
	41-50		75	46.3	26	16.0	61	37.7	162
	51-60		23	39.7	13	22.4	22	37.9	58
	60+		11	50.0	5	22.7	6	27.3	22
Economic Status	Student		26	30.2	4	4.7	56	65.1	86
	Employed		228	44.1	89	17.2	200	38.7	517
	Home maker		27	50.9	6	11.3	20	37.7	53
	Other		15	31.9	8	17.0	24	51.1	47
All respondents			297	41.9	110	15.5	302	42.6	709

On-campus students are more likely to have received some form of training than ODL students. Almost seventy percent (69.4%) of on-campus students took either the ECDL or some other course (mainly through the schools). This is no doubt an effect of vigorous government policies on ICTs in schools since the early 1990s. Of the ODL students, not surprisingly, undergraduate IT students are more likely to have taken courses (64.8% of IT students, compared with 51.8% of BA students). A high proportion of Masters in IT students report not having received formal training and this may be explained by the fact that the most of the programmes followed by these students are aimed at graduates from non-IT backgrounds. Women are more likely than men to have taken formal courses (e.g. 17.5% of females took the ECDL compared with 11.8% of men). The older age groups are less like to have received training however, the most distinct variation is between the 18-22 group (i.e. mostly on-campus students, who have gone to university directly after school) and those aged 23 years and upwards. Just under one third (32.3%) of the 18-22 group have received no formal training compared with 43.6% of those aged over 23 years. The level of training is also linked with economic status. It is surprising to note that a high proportion of those in employment (44.1%) have received no formal training, compared with just under one third of students (30.2%) and 31.9% of those in the ‘other’ category (unemployed, retired).

## 10.6 EXPERIENCE OF ICTs IN LEARNING

### 10.6.1 USE OF THE INTERNET

Having established the level of access and expertise in using technology, respondents were given a list of five activities involving use of the Internet and asked to indicate the frequency of use in the previous three months. The responses are summarised in Tables 10.11 below.

**Table 10.11: Use of Internet in Previous Three Months**

Used Internet to:	% No Response	% Never	% Monthly	% Weekly	% Daily	% Total	N
Email students/tutors	11.7	26.0	34.1	20.5	7.7	100.0	751
Access educational material	4.0	7.9	28.1	47.0	13.0	100.0	751
Prepare Assignments	5.3	7.9	36.0	40.5	10.4	100.0	751
Video conference	17.6	77.4	3.5	1.2	0.4	100.0	751
Make Travel/holiday arrangements	13.8	32.0	45.5	7.9	0.8	100.0	751

As Table 10.11 shows, students made substantial use of the Internet for accessing educational material and for preparing assignments. Some 60% had used the Internet at least once a week in the previous three months to access educational material, and a further 28.1% had accessed on a monthly basis. The figures for preparing assignments are similar. However, just under 30% reported emailing fellow students or tutors at least once per week and just over one quarter (26%) reported that they had never done so. Over three quarters (77.4%) had never participated in a video-conference.

## 10.6.2 EXPERIENCE OF ICT IN EDUCATION

*I am not anti elearning but my experience of Pageout [a virtual learning environment developed by McGraw Hill publishers] proved to me that elearning has to improve a lot or be very good, before it can substitute for the tried trusted methods. Depends on subject matter too. Elearning can be a very useful aid in subject like history but is not a substitute for reading work by historians.* Female BA Respondent

The data on usage of email and accessing educational material were further analysed by programme, to establish if there are any variations in patterns of usage. Table 10.12 demonstrates clearly that students vary in their usage of the Internet depending on the programme on which they are registered, as well as mode of study. On-campus students made consistently more use of the Internet for both email and accessing educational material. Over half (55.5%) of on-campus students reported emailing fellow students or tutors at least once per week, compared with just 37.1% of ODL undergraduate IT students. ODL students in other programmes were even less likely to report emailing students/tutors. Just over one fifth (20.3%) of nursing students and 12.0% of BA student reported using email at least once per week. The data show that respondents reported high usage of the Internet for accessing educational material, however, again, rates of usage vary substantially by programme. Almost all (95%) of on-campus respondents had accessed educational material on the Internet at least once per week, compared with over two thirds (69.4%) of ODL undergraduate IT respondents. Again, BA respondents were least likely to have used the Internet; just over two fifths (41.8%) had accessed educational material at least once per week, compared with just under half (49.2%) of nursing respondents.

**Table 10.12: Use of Internet by Programme**

a) Used Internet to Email fellow students/tutors													
Programme		No response		Never		Monthly		Weekly		Daily		Total	
		N	%	N	%	N	%	N	%	N	%	N	%
ODL	BA	59	19.7	105	35.1	99	33.1	27	9.0	9	3.0	299	100.0
	IT	11	4.7	38	16.2	99	42.1	61	26.0	26	11.1	235	100.0
	Nursing	7	11.9	25	42.4	15	25.4	11	18.6	1	1.7	59	100.0
	MIT	4	10.3	5	12.8	19	48.7	9	23.1	2	5.1	39	100.0
On-campus	Psychology	7	5.9	22	18.5	24	20.2	46	38.7	20	16.8	119	100.0
Totals		88	11.7	195	26.0	256	34.1	154	20.5	58	7.7	751	100.0

b) Used Internet to access educational material													
Programme		No response		Never		Monthly		Weekly		Daily		Total	
		N	%	N	%	N	%	N	%	N	%	N	%
ODL	BA	23	7.7	41	13.7	110	36.8	111	37.1	14	4.7	299	100.0
	IT	4	1.7	10	4.3	58	24.7	128	54.5	35	14.9	235	100.0
	Nursing	0	0.0	6	10.2	24	40.7	25	42.4	4	6.8	59	100.0
	MIT	3	7.7	2	5.1	13	33.3	17	43.6	4	10.3	39	100.0
On-campus	Psychology	0	0.0		0.0	6	5.0	72	60.5	41	34.5	119	100.0
Totals		30	4.0	59	7.9	211	28.1	353	47.0	98	13.0	751	100.0

In an attempt to further probe the level of experience in using ICTs in educational contexts, respondents were asked to indicate the frequency of their involvement in a list of five educational scenarios (derived from the SPOTPLUS questionnaire): academic support and advice from a teacher by email; a course website with interactive features, such as assessment, online tasks or learning materials; an online discussion forum; video-conferencing; virtual learning environment (VLE) such as WebCT, Blackboard or Pageout.. As Table 10.13 shows, over half (59.2%) of respondents had received tutor support by email at least once. Just 39.5% had experience of a course supported by a website; less than one quarter (23.6%) had experience of an online discussion forum; 18% had participated in a video conference, and only 12.5% had experience of a VLE.

**Table 10.13: Involvement in Online Education**

Online educational activity	Several Times		Once		Never		Never heard of this		No response		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Tutor support	306	40.7	139	18.5	282	37.5	17	2.3	7	0.9	751	100.0
Course Website	172	22.9	125	16.6	397	52.9	50	6.7	7	0.9	751	100.0
Online discussion forum	127	16.9	50	6.7	526	70.0	36	4.8	12	1.6	751	100.0
Video Conferencing	84	11.2	51	6.8	571	76.0	31	4.1	14	1.9	751	100.0
VLE (e.g. WebCT)	43	5.7	51	6.8	491	65.4	154	20.5	12	1.6	751	100.0

When the data on involvement in online education are further analysed by programme, it is clear that ODL IT respondents and on-campus respondents are more likely to have experience of online education. Table 10.14 breaks down the figures for those who participated in the five activities at least once by programme. Over four fifths (84.6%) of postgraduate IT and over three quarters (76.8%) of undergraduate IT students received support by email from tutors, compared with less than half (47.1%) of BA respondents and one third (32.8%) of nursing respondents. Almost two thirds (63.0%) of on-campus respondents had received similar support. While involvement in the other four activities is considerably less, the pattern of disparities between the technical/non technical disciplines in the ODL group remains, as does the disparity between the on-campus/ODL groups.

**Table 10.14: Involvement in Online Education by Programme**

Online educational activity – at least once	ODL Respondents						On-Campus			
	BA	%	IT	%	Nursing	%	MIT	%	Psy	%
Tutor support	139	47.1	179	76.8	19	32.8	33	84.6	75	63.0
Course Website	81	27.6	123	52.6	8	13.8	21	53.8	64	53.8
Online discussion forum	43	14.7	86	37.2	5	8.6	12	31.6	31	26.1
Video Conferencing	34	11.7	72	31.3	6	10.3	10	25.6	13	10.9
VLE (e.g. WebCT)	25	8.6	49	21.0	1	1.7	5	12.8	14	11.8

The previous sections have analysed data in respect of respondents' access to technology, their expertise in using the technology, and the extent of their experience in using the Internet for educational purposes. These analyses have shown that respondents are not a homogenous group, and that the major differentiating factors are programme of studies and mode of study. Programmes of study vary in terms of their population by gender, age, economic status, motivation for study, and previous educational background. Respondents on technology programmes are more likely to be male, younger, employed, and motivated by extrinsic factors than students in the non-technical disciplines, who are largely female, older, less likely to be employed and more motivated by intrinsic factors. The technology group are also more likely to have greater access to technology, greater expertise in using the technology and more experience in ICTs in education. However, it is also useful to note that mode of study differentiates the groups. The on-campus group is concentrated into the 18-22 age group, and is more likely than the ODL group to use ICTs in education.

It is important to note that that even within conventional universities, levels of expertise and experience in ICTs vary considerably. Data on the percentage of respondents in the twelve universities involved in the SPOT+ survey who reported never having used eight technologies (word-processing, email, presentation manager software, online library database, course website, online discussion forum, video conferencing and email support from a teacher) were extracted and compared with the data on Oscail and QUB Belfast students. These data are summarised in table 10.15 below.

**Table 10.15: Percentage Who Had Never Used Selected Technologies By University**

University	Word processing	Email	Presentation Manager	Online Data base	Course Website	Online discussion Forum	Video Conferencing	Email support teacher
Aarhus	3.8	0.8	24.2	1.5	38.3	37.9	83.5	10.5
Abo	3.6	1.2	20.0	5.4	44.3	46.7	83.2	26.9
Bergen	2.5	0.0	21.7	4.3	36.1	35.9	85.4	18.2
Budapest	4.2	0.0	17.9	14.3	7.4	11.6	86.3	11.7
Edinburgh	1.2	3.1	40.5	11.0	39.8	66.5	83.0	21.3
Erlangen	7.5	3.8	33.3	3.7	46.9	56.8	90.1	37.0
Gdansk	4.0	14.0	34.2	10.6	49.0	30.5	78.8	62.9
Granada	13.2	8.6	24.0	13.9	59.6	55.3	62.9	50.0
Groningen	0.0	0.0	12.6	14.7	9.1	64.3	86.7	23.6
Krakow	6.9	4.6	13.8	26.4	73.6	47.1	82.8	47.1
Leuven	2.0	1.2	22.4	3.9	20.8	29.8	73.6	17.3
<b>Oscail</b>	<b>3.5</b>	<b>4.7</b>	<b>24.3</b>	<b>12.3</b>	<b>55.5</b>	<b>68.9</b>	<b>76.7</b>	<b>38.6</b>
Padova	4.3	0.0	8.7	11.1	43.5	56.5	41.3	23.9
<b>QUB Belfast</b>	<b>0.8</b>	<b>0.0</b>	<b>37.6</b>	<b>12.0</b>	<b>40.3</b>	<b>65.5</b>	<b>81.5</b>	<b>34.5</b>

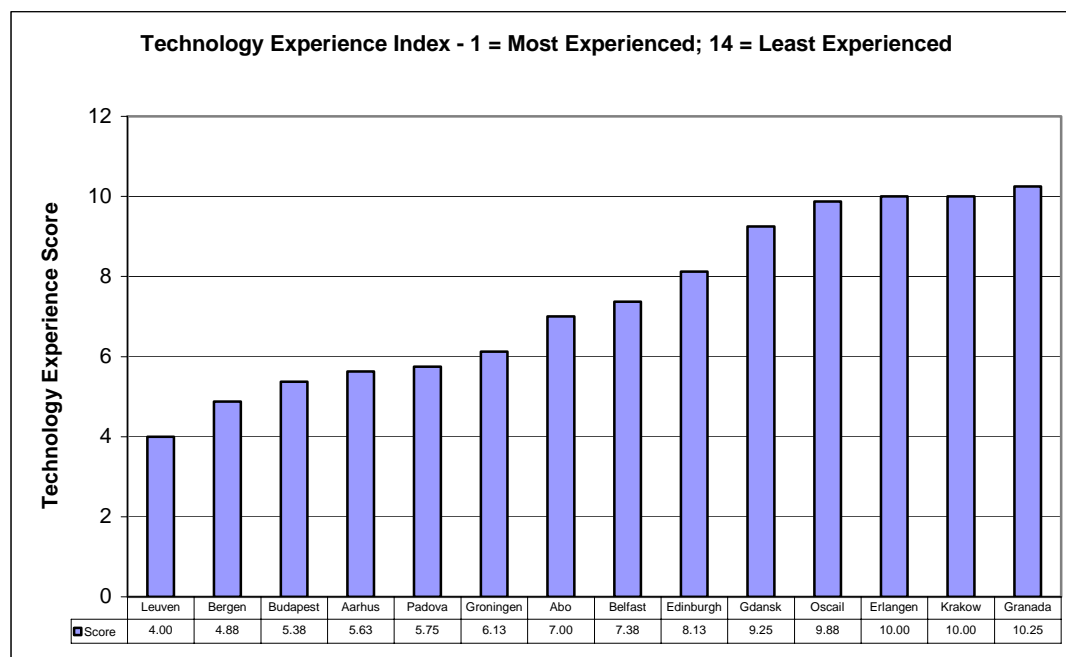
As Table 10.15 shows, while there was relatively little variation in use of word-processing and email software, those who had never used presentation manager software ranged from a low of 8.7% in Padova to 40.5% in Edinburgh; almost three quarters (73.6%) of Krakow students had never used a course website, compared with just 7.4% of Budapest students; and over two thirds (68.9%) of Oscail students had never used an online discussion forum, compared with 11.6% of Budapest students.

The variations in technology experience between universities are illustrated graphically in Figure 10.2. Each university was allocated a 'technology experience' score calculated as the average ranking across the eight technologies. The university with the lowest percentage of non-users in a specific technology was allocated a score of 1, whereas the university with the highest percentage of non-users was allocated a score of 14. Thus an average score of 1 would indicate a high level of experience in using technologies and an average score of 14 would indicate a relatively low level of experience. Examination of Figure 10.2 reveals that the University of Leuven with an average score of 4 had the highest level of technology experience; a group of four universities fell into a moderately high group with scores between 4 and 6 (Bergen, Budapest, Aarhus and Padova); a moderately low group with scores between 6 and 9 included Groningen, Abo, QUB Belfast, and Edinburgh, while the Oscail respondents were in the low technology group together with Erlangen, Krakow and Granada. The authors of the SPOT+ survey suggest that these differences are a reflection, not of student attitudes but of

their access to software or equipment needed to use them, especially in the case of presentation managers. The important message for the universities is to note the extent to which other universities are enabling their students to acquire important skills and the need in some cases to make progress quickly (SPOT+, 2003: 5).



**Figure 10.2: Variation in Experience using Technologies in Education Between European Universities**



In the next section attitudes to eLearning and the use of technology in education will be analysed.

## 10.7 ATTITUDES TO ODL/ELEARNING

*The necessity for human contact should always be kept in mind, as should the fundamental and traditional love of books and reading which is and should be an integral part of Humanities course in particular. Too much technology may be sterile, intellectually. Technology is here to stay but should be seen only as an aid to flesh & blood.* Male BA student

*The traditional methods of teaching should be erased completely.* Female On-campus student

*Technology cannot be allowed to disadvantage or marginalise sections of the population with no access. Technology should start by making resources available to all e.g. texts, library etc. ... Technology needs to provide active learning experience; reading text off the VDU is worse than text on page. Technology has a role to play in reforming antiquated academic structures in Ireland and Abroad.* Male BA student

*Technology especially Internet and advanced communications, is now a mainstay of many types of activity and not just economic and is a part of modern life. So it has to be given a bigger place in education. Distance learning, conventional courses and adult education are ideal areas for greater expansion.* Female BA Student

### 10.7.1 ATTITUDES TO ICTs IN EDUCATION – FACTOR ANALYSIS

A series of 40 Likert statements were drawn up to elicit attitudes to various aspects of ICTs in education. The statements were selected from a range of sources to cover the maximum

amount of nuances and to provide for checking of internal consistency. The list included statements designed to measure respondents' computer self-efficacy, their value on ICTs in education, their attitude to ICTs as a response to social demands on education and preferences for learning approach. Ten statements were drawn from the questionnaire used by Jill McMahon in her study of the attitudes of students in Queen's University Belfast (McMahon, 1997). These statements comprised two factors measuring 'computer confidence' (e.g. 'I would generally feel ok trying something new on the computer') and 'computer valuing' (e.g. 'All students should learn something about computers as part of their course'). A further twelve statements were derived from the SPOT+ questionnaire. These statements probed attitudes to both negative (e.g. 'Good access to a tutor requires face to face contact') and positive aspects of technology (e.g. 'I think that ICTs can improve my learning') as well as preferences for traditional learning approaches (e.g. 'I prefer reading from a printed text'). The remaining eighteen statements were derived from previous surveys carried out by the author on student attitudes to societal imperatives for technology in education (e.g. 'Access to the Internet is essential for the modern learner'), as well as the impact of ICTs on the quality of the learning experience (e.g. 'Computers reduce the quality of the learning experience' (MacKeogh, 2001a)). Respondents were asked to indicate the extent to which they agreed or disagreed with the statements and responses were coded 1 (strongly agree), 2 (generally agree), 3 (mixed views), 4 (generally agree) and 5 (strongly agree).

Table 10.16 summarises the mean response to each statement. Statement 38 taken from the McMahon study ('If I could afford to I would buy a home computer') caused confusion among some respondents who already owned a PC and who were uncertain about how to answer the question. This resulted in a higher non-response to this question compared to the other statements (53 students did not respond to this statement compared with the next highest non-response of 13 to question 23). Accordingly, this statement was withdrawn from the subsequent factor analysis.

Table 10.16: Attitudes to ICTs in Education

Source	Statement No	Statement (1 = strongly agree, 5 = strongly disagree)	Mean Response	Std. Dev	N
Oscail Surveys (MacKeogh, 2001a)	3	ICTs in education will disadvantage students who cannot afford the technology	2.14	1.09	749
	8	Course information should be available on the web	1.57	0.86	748
	10	Computer based conferencing would help learning	2.53	0.84	742
	11	Computer access to libraries is preferable to personal visits	2.65	1.17	746
	12	Access to the internet is essential for the modern learner	1.83	0.97	747
	13	We should use ICT in education because we live in the Information Society	2.08	0.92	748
	14	Time spent learning on the computer is time well spent	2.13	0.83	749
	22	ICTs in education will help to develop a European workforce qualified to compete against global competition	2.27	0.95	740
	24	Quality information is hard to find on the web (WWW)	2.93	1.15	744
	26	Computer based learning is the way of the future	2.21	0.92	746
	31	Courses should be presented on CD-ROMs	2.48	1.03	745
	32	Computers can bring students together to share ideas and problems	2.60	0.96	748
	33	Computers reduce the quality of the learning experience	3.23	0.96	748
	34	Computer based materials are more likely to be up to date	2.27	0.82	747
	35	Anyone can develop the skills needed to use new technology	2.08	0.81	747
	36	The web allows information to be made available at just the right time	2.24	0.84	744
	37	Investing in ICTs in education is a waste of money	4.20	0.77	742
	39	ICTs provide greater flexibility in learning	2.02	0.75	742
McMahon (McMahon, 1997)	2	I would generally feel ok trying something new on a computer	1.92	0.93	745
	5	I feel threatened by the thought of having to use a computer	4.29	1.01	749
	6	I avoid using computers whenever I can	4.26	1.10	744
	17	I feel fairly confident when working with computers	1.88	1.02	747
	20	I would like to know more about computers	1.85	0.94	749
	21	I'm often unsure what to do when using a computer	3.55	1.25	748
	25	All students should learn something about computers as part of their course	1.76	0.84	748
	29	I do not understand how people can enjoy working with computers	3.86	1.05	750
	30	I am generally quite good with computers	2.09	1.08	747
	38	If I could afford to I would buy a home computer	1.52	0.82	692
SPOT+ (SPOT+, 2002)	1	I prefer to learn on my own	2.58	0.94	746
	4	I prefer reading from a printed text	2.04	0.94	744
	7	Good access to a tutor requires face to face contact	2.56	1.15	750
	9	Computer based teaching/learning is lacking in 'human interaction' since there is no face to face contact	2.54	1.09	750
	15	Learning with ICT requires highly developed study skills	2.85	0.95	746
	16	If studying with a computer turned out to be too complex, I would like to return to traditional education methods	2.47	1.09	744
	18	I like to learn in teams or small groups	2.51	1.01	748
	19	I think that ICTs can improve my learning	2.17	0.85	746
	23	In general learning with ICT is very time consuming	2.89	0.98	738
	27	I think that in online courses, small-group learning may become disorganised	2.85	0.84	746
	28	I prefer to study with traditional education methods	2.85	1.02	744
	40	I would like to cooperate on learning tasks with people from different countries	2.38	0.97	741

The main functions of Factor Analysis are to reduce the number of variables and to detect structures in relationships between variables (Aron and Aron, 2003). Using SPSS to carry out the calculations, Principal Components Analysis identified eight factors with eigenvalues above 1 (the normal cut-off point for extracting factors (Cattell, 1966)). However, a Scree test indicated that no more than three factors (accounting for 40.2% of the

total variance) should be considered. The factors were rotated using the varimax method with Kaiser normalisation. This yielded the factor structure outlined in Table 10.17.

**Table 10.17: Factor Loadings Matrix**

Orthogonal Factor Loading Matrix for Factors			
<b>Factor 1: Computer Confidence</b>	Factor 1	Factor 2	Factor 3
I feel fairly confident when working with computers	0.859	0.092	-0.061
I am generally quite good with computers	0.846	0.110	-0.037
I feel threatened by having to use a computer	-0.826	-0.159	0.146
I avoid using computers	-0.804	-0.140	0.149
I'm often unsure what to do when using a computer	-0.777	-0.018	0.071
I would generally feel ok trying something new on a computer	0.737	0.176	-0.036
I don't understand how people enjoy working with computers	-0.575	-0.214	0.184
<b>Factor 2: Valuing ICTs</b>			
ICTs will develop European workforce against global comp	0.025	0.697	0.044
ICT should be used in the Information Society	0.129	0.689	-0.032
I would like to know more about computers	0.066	0.646	-0.241
I think that ICTs can improve my learning	0.236	0.641	-0.196
Time spent learning on the computer is time well spent	0.198	0.622	0.013
Computer based learning is the way of the future	-0.005	0.578	-0.037
All students should learn about computers	0.202	0.575	0.099
ICTs provide greater flexibility in learning	0.131	0.569	-0.150
I would like to cooperate on learning tasks with other countries	0.112	0.546	-0.025
Investing in ICTs in education is a waste of money	-0.186	-0.538	0.120
Access to the internet is essential for the modern learner	0.187	0.511	0.022
<b>Factor 3: Impact on Pedagogy</b>			
Computer based teaching lacks human interaction	-0.136	-0.161	0.660
ICTs in education will disadvantage poor students who cannot afford the technology	0.038	-0.029	0.588
Good access to a tutor requires face to face contact	-0.211	-0.035	0.572
Learning with ICT requires highly developed study skills	-0.126	0.168	0.541
I prefer to study with traditional methods	-0.318	-0.334	0.462
If studying with a computer turned out to be too complex, I would like to return to traditional education methods	-0.268	-0.305	0.454
Computers reduce the quality of the learning experience	-0.261	-0.321	0.361
Eigenvalue	10.25	3.27	2.15
% of Variance	26.28	8.39	5.51
Cumulative %	26.28	34.66	40.17
Cronbach's Alpha Coefficient	.9142	.8721	.7420

The reliability for each factor was evaluated using Cronbach's Alpha. The first factor, comprises seven statements from McMahon's computer confidence factor, accounting for 26.28% of variables. The reliability coefficient (Cronbach's Alpha) was .9142 suggesting that there was a high degree of internal consistency in the items loading on to this factor and confirms the robustness of that measure. The second factor, comprising eleven statements accounts for 8.39% of the variance. This factor appears to relate to positively valuing ICTs. Cronbach's Alpha was .8721. The third factor accounts for 5.51% of the variance and comprises seven statements which appear to relate to concerns about the impact of technology on pedagogy and the learning experience. The Cronbach's Alpha for this factor was .7420.

### 10.7.2 COMPARISON WITH SPOT+ SURVEY

As mentioned previously, a number of statements in the survey were drawn from a similar survey of students in twelve universities across Europe which yielded a response of 1,998. The SPOT+ respondents were mainly in full-time university education, with over 80% aged under 25 years (SPOT+, 2003: 2). The survey authors comment that

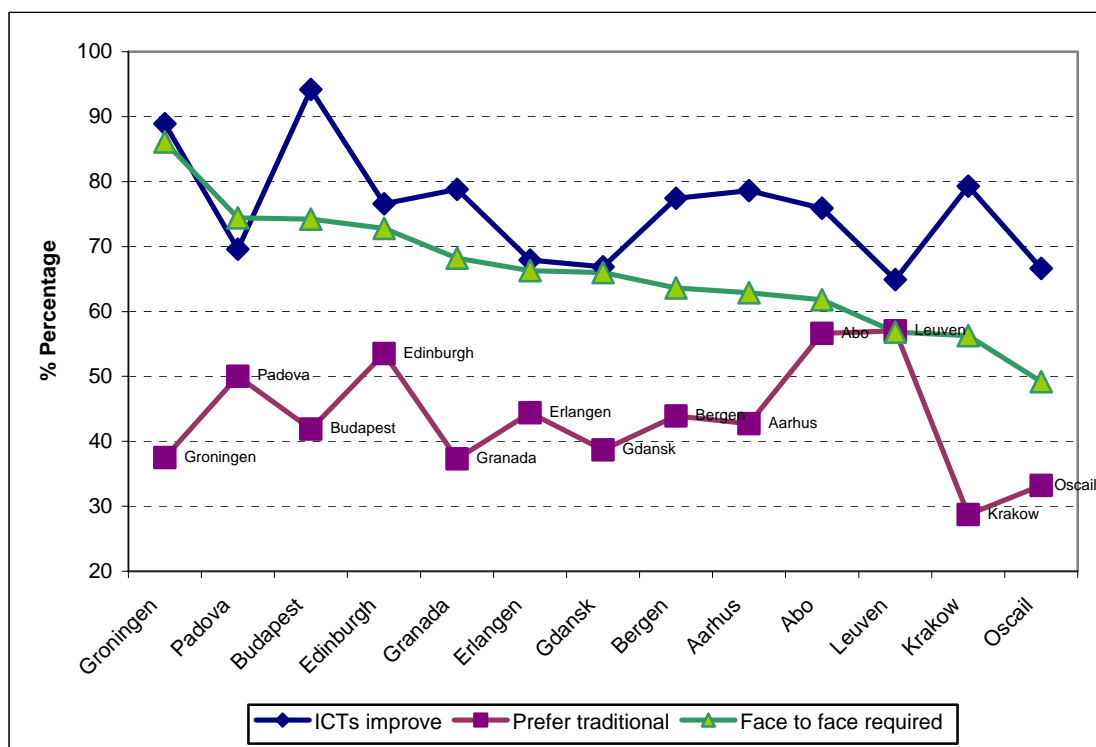
University students in our sample held a fairly positive view of the different advantages that ICT can bring to learning and education. However, this positive view of ICT was accompanied by a rather positive attitude towards learning with traditional methods and one which questioned the role of ICT in education (SPOT+, 2003: 8).

Three key statements used in both surveys were selected for ease of comparison between the Oscail and the SPOT+ groups. These were:

- I think that ICTs can improve my learning
- I prefer to study with traditional education methods
- Good access to a tutor requires face-to-face contact

Figure 10.3 graphically illustrates the percentage of Oscail and the SPOT+ respondents who agreed with these statements. Some interesting patterns emerge. To a certain extent, as might be expected in view of the different characteristics of the respondents, the Oscail group expressed quite different views to the SPOT+ group. The Oscail group was less likely to agree that ICTs would improve learning, to prefer traditional methods, and to require face-to-face contact with a tutor. Two thirds (66.6%) of the Oscail group agreed that ICTs would improve their learning (compared with 88.9% of Groningen students and 94.2% of Budapest students). However, attitudes varied among the other universities with three sharing relatively low levels of agreement (Erlangen 67.9%, Gdansk 69.9%, and Leuven 64.7%). This is perhaps surprising since Leuven scored highest in the technology experience index illustrated in Figure 10.2 above. Perhaps experience with technology has led to some degree of disillusion as to its impact on the quality of learning. It is surprising however, to note the positive correlation between positive attitudes to ICTs and agreement that face-to-face contact with tutors was essential (Pearson's  $R = .58$ ). The Groningen group which were most in agreement with the potential of ICTs were also the most likely to agree that face-to-face contact was required (86%), compared with less than half of the Oscail group, which are of course used to distance education methodologies. Not surprisingly, there is a slight negative correlation between positive attitudes to ICTs and preference for traditional methods (Pearson's  $R = -.2467$ ). Oscail respondents were also less likely to express a preference for studying with traditional education methods than any of the other groups with the exception of Krakow, of whom 28.7% preferred traditional methods.

**Figure 10.3: Comparison of Attitudes to ICTs in Education Oscail Survey and SPOT+ Survey**



It is beyond the scope of this thesis to delve further into comparisons between the attitudes expressed in the SPOT+ survey. However, it is useful to note that even within a group which is relatively homogenous with regard to age, differences in attitudes emerge, possibly related to organisational and national policy factors as much as to individual characteristics. The next section will turn to an analysis of the relationship between the characteristics of the ODL and On-campus respondents, and their attitudes to ICTs and technology in learning.

### 10.7.3 ATTITUDES BY CHARACTERISTICS OF RESPONDENTS

The often conflicting attitudes to ICTs are illustrated in the following comments from respondents:

*eLearning courses can be available to all with computers, Rural living does not hinder one's ability to access info/education. For this reason I fully support ELearning. Learning is not now restricted to those living beside colleges, institutions for education. It will give equal opportunity to all who wish to further their education. The cost etc may create inequalities.*  
Female BA respondent

*I would rather avoid computers outside work and find Oscail's existing methods suit me very well.* Female BA respondent

*I believe it is elitist. Not everyone has access to a computer. At home or in an Internet shop, if accessing the Internet, it all costs money, even to print is expensive. If you missed out going to college after secondary school and after working some years can just about afford to go to college through distance education then Internet access is an unnecessary expense.*  
Female BA respondent

*I would not like to see use of technology excluding people from education. I think it would be important for traditional methods of learning to exist side by side with the latest technology. However there is such a wealth of info available in compact form on cd-rom,*



*Internet etc. It would be a shame not to make use of it. It should be stressed that technology is only a tool, it does not replace the hard graft of learning.* Female BA respondent

The items loading onto each of the three factors were used to create scales for Computer Confidence, Valuing ICTs and Impact on Pedagogy. By summing up the items, respondents were allocated a score for each factor. Scores were then divided into three categories for easier analysis. The distribution of respondents according to factor scores cross-tabulated by programme and gender are given in Table 10.18.

From Analysis of Table 10.18, it may be deduced that ODL technology respondents, as would be expected, rate higher on the computer confidence scale than either ODL non-technology respondents or on-campus respondents. Almost all (90.5%) of ODL undergraduate IT respondents scored in the high computer confidence category, compared with just 52.4% of ODL BA respondents and 43.1% of on-campus respondents. Males were also more confident in their computer abilities than females: over three quarters of men (75.4%) compared with over half of women (55.6%) scored in the high computer confidence category.

Again, not surprisingly, technology respondents scored higher on the valuing ICT scale, with two thirds (66.4%) of undergraduate IT respondents rating ICTs highly, compared with just 43.6% of BA respondents. However, nursing respondents rated highly on this measure with almost three quarters of respondents scoring in the high value category (65.5%). There was little difference between men and women on this score with 55.6% of men and 50.0% of women scoring in the high value on ICT category.

**Table 10.18: Analysis of Attitudinal Factors by Programme and Gender**

a) Factor 1: Computer Confidence

		N	%	N	%	N	%	N	%
Programme		High Confidence Score (7-14)		Moderate Confidence Score (15-21)		Low Confidence Score (22-35)		Total	
ODL	BA	150	52.4	83	29.0	53	18.5	286	100.0
	IT	209	90.5	21	9.1	1	0.4	231	100.0
	Nursing	26	44.1	18	30.5	15	25.4	59	100.0
	MIT	30	78.9	7	18.4	1	2.6	38	100.0
On-Campus	Psy	50	43.1	45	38.8	21	18.1	116	100.0
Totals		465	63.7	174	23.8	91	12.5	730	100.0
Gender		High Confidence Score (7-14)		Moderate Confidence Score (15-21)		Low Confidence Score (22-35)		Total	
Male		224	75.4	56	18.9	17	5.7	297	100.0
Female		237	55.6	117	27.5	72	16.9	426	100.0
Total		461	63.8	173	23.9	89	12.3	723	100.0

b) Factor 2: Valuing ICTs

Programme		High Value Score (11-22)		Neutral Value Score (23-33)		Low Value Score (34-55)		Total	
ODL	BA	120	43.6	131	47.6	24	8.7	275	100.0
	IT	150	66.4	73	32.3	3	1.3	226	100.0
	Nursing	36	65.5	17	30.9	2	3.6	55	100.0
	MIT	18	50.0	14	38.9	4	11.1	36	100.0
On-Campus	Psy	46	39.7	68	58.6	2	1.7	116	100.0
Total		370	52.3	303	42.8	35	4.9	708	100.0
Gender		High Value		Neutral		Low Value		Total	
Male		159	55.6	119	41.6	8	2.8	286	100.0
Female		209	50.0	182	43.5	27	6.5	418	100.0
Total		368	52.3	301	42.8	35	5.0	704	100.0

c) Factor 3: Impact on Pedagogy

Programme		Negative Impact (7-14)		Neutral Impact (15-21)		Positive Impact (22-35)		Total	
ODL	BA	74	26.1	161	56.7	49	17.3	284	100.0
	IT	21	9.1	136	59.1	73	31.7	230	100.0
	Nursing	12	20.7	27	46.6	19	32.8	58	100.0
	MIT	5	13.5	21	56.8	11	29.7	37	100.0
On-Campus	Psy	13	11.0	74	62.7	31	26.3	118	100.0
Total		125	17.2	419	57.6	183	25.2	727	100.0
Gender		Negative Impact		Neutral Impact		Positive Impact		Total	
Male		44	15.0	188	63.9	62	21.1	294	100.0
Female		79	18.5	231	54.0	118	27.6	428	100.0
Total		123	17.0	419	58.0	180	24.9	722	100.0

Just over one quarter (25.2%) of respondents scored in the highly positive category on Factor 3: Impact of ICTs on pedagogy, while 17.2% were in the negative category. ODL BA respondents appear to be least positive towards the impact of technology on the student experience (17.3% were positive compared with 31.7% of IT or 32.8% of Nursing respondents). Women were slightly more likely to be negative (18.5%) or positive (27.6%) than men (15.0% and 21.1% respectively). It is interesting to note that over half (57.6%) of respondents fall into the neutral category, displaying a high degree of reservations and mixed views on the potential impact of technology on the educational experience.

#### 10.7.4 RATING OF POTENTIAL OF ICTs

Respondents were presented with a list of educational opportunities which could be enhanced by ICTs. Table 10.19 outlines the percentages of those who rated items as very important, broken down by programme. Only a small percentage of respondents rated these opportunities as not important, however it is interesting to note the variation in levels of importance ascribed to the different elements, with less support for elements which would directly impinge on the individual learner. As the data show, the highest levels of importance were ascribed to ICTs' potential to widen access to those in remote regions (74.9%), or to disadvantaged students (71.2%). There is also widespread acknowledgement of the importance of providing improved services and support to students (67.3% consider it very important that ICTs provide more effective feedback to students; 60.9% consider widening sources of information to students to be very important). There is less support for development of employability skills (55.9%). However, support drops substantially in respect of more collaborative learning approaches. Just over one third (35.4%) rated development of a more autonomous learner centred approach to be very important, compared with 14.9% who rated a more collaborative and less individual approach to learning as very important. Responses varied between programmes, with non-technical ODL students, and in particular nursing respondents, being more supportive of the potential of ICTs across the range of opportunities, whether for equalising access to higher education or for developing more collaborative approaches to learning. For example, 59.3% of nursing respondents rated development of autonomous learner centred approaches as important compared with just 29.9% of IT respondents, or 15.4% of MIT respondents.

**Table 10.19: Areas Enhanced By ICTs By Programme**

Opportunities which could be enhanced by ICT:	% Rating element 'Very Important'					Total
	% BA	% IT	% Nursing	% MIT	% Psy	
Access from remote regions to HE	80.8	73.2	81.4	57.9	66.4	74.9
Access by disadvantaged students to HE	74.7	68.8	79.7	42.1	72.4	71.2
Providing more effective/frequent feedback to students	72.0	67.0	78.0	53.8	55.5	67.3
Widening sources of information to students	61.2	60.7	64.4	56.4	60.5	60.9
Development of employability skills	61.0	56.0	61.0	38.5	46.2	55.9
Development of autonomous learner centred approach in HE	42.6	29.9	59.3	15.4	23.5	35.4
Collaboration between students in other countries	32.5	29.4	43.1	12.8	19.3	29.2
Internet courses between other institutions and countries	32.5	28.9	43.9	15.4	16.8	28.8
More collaborative/less individual approach to learning	18.6	12.1	18.6	12.8	10.2	14.9

#### 10.7.5 PREFERENCE FOR MODE OF STUDY

*Ideally, full-time, face-to-face with online support etc is the best method for learning. Unfortunately, this option is not available to all students. I feel it is essential that a combination of face-to-face interaction with tutors and other students along with a combination of printed texts and IT access will create a balance.* Female BA student.

Respondents were asked to rank a list of seven modes of study in order of preference (on-campus full or part-time lectures, or ODL, without online support; on-campus full or part-time lectures, or ODL, plus online support; or elearning, defined as a mix of written course materials, online materials, online tutorial support and interaction with other students and tutors). Table 10.20 shows the first preferences for mode of study broken down by programme.

**Table 10.20: Preferences For Mode Of Study By Programme**

Mode of Study	BA		IT(incl MIT)		Nursing		On-campus Psy		Total	
	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%
Full-Time + Online	2	23.3	2	25.2	5	7.5	1	58.4	1	28.8
ODL + online	1	25.7	1	29.1	1	37.7	7	0.0	2	23.4
Part-Time + Online	4	12.8	3	16.7	2	22.6	2	24.8	3	17.0
ELearning	5	9.7	4	16.7	3	13.2	4	4.4	4	11.6
Full-time – No technology	3	13.6	6	4.3	5	7.5	3	5.3	5	8.4
ODL – No technology	6	9.3	5	6.4	4	11.3	6	2.7	6	7.3
Part-time – No technology	7	5.4	7	1.7	7	0.0	4	4.4	7	3.5
N =	257	100.0	234	100.0	53	100.0	113	100.0	657	

As would be expected, on-campus students strongly support full-time on-campus lectures enhanced by online learning with over half (58.4%) ranking this as their first preference, while almost one quarter (24.8%) opt for part-time face-to-face lectures with online support as their first preference. Just 2.7% of the on-campus group rated ODL as their first preference. As would be expected, ODL students are more inclined to rank ODL enhanced by online support as their first preference, although this group tended to favour other options (only 37.7% of Nursing; 29.1% IT/MIT; and 25.7% BA selected online enhanced ODL as their first preferences). For the ODL IT and BA respondents, the next largest group allocated their first preference to full-time lectures enhanced by online learning (23.3% and 25.2% respectively rated this as first preference), whereas the second largest group (22.6%) of Nursing respondents opted for part-time lectures enhanced by online learning. From a number of comments it is apparent that the respondents' circumstances (employment status, distance from universities, and availability of flexible programmes locally) tend to dictate preferences and that for ODL students the choice of study mode is severely limited. One female BA student commented

*If I had the choice, on campus education would be the best option but distance learning is very flexible and compatible with home/work commitments.*

Of interest is the fact that four fifths of all respondents (80.8%) indicated their first preference for online enhanced learning (whether full-time, part-time, ODL or eLearning). This, of course, leaves a relatively large group who appear to reject any form of online enhancement to their studies. Rejection of technology is highest among ODL BA respondents (28.3% selected non-technology enhanced modes as first preference, compared with 18.8% of nursing respondents).

The 'technology resistant' group among ODL IT and on-campus respondents was somewhat smaller (12.4% of respondents in both groups selected non-technology enhanced modes as their first preference). However, even where respondents are supportive of online enhancement, there is still strong support for some element of face-to-face contact, with elearning being placed lowest of the four online enhanced modes of study (just 2.7% of on-campus respondents, compared with 16.7% of IT/MIT, 13.2% of Nursing and 9.7% of BA opted for elearning as their first preference). According to a female BA student

*Distance education enables those working to participate in courses they would otherwise not have access to. While online support is better than nothing I would not like it to be the only mode of communicating with students and tutors. If I was communicating with another student or students regularly without seeing a face I think it would freak me a little.*

An ODL MIT student also favoured face-to-face contact:

*Technology provides brilliant opportunities for improvement in learning. I am however of a disposition that favours personal contact in training and education. Some people I believe, learn much better when material is explained to them once (i.e. lectures).*

### 10.7.6 WHO SHOULD PAY?

*Generally speaking, I have nothing against the use of Internet to deliver the IT course. It is a matter of whether I can afford a computer and the Internet access. At the moment I can afford neither of them* Female IT Student

As a further measure of attitudes to the use of ICTs in education, respondents were asked ‘If a course requires you to purchase a personal computer, what is the maximum price you would be prepared to pay?’ The precoded responses included the option that the respondent could not afford to pay anything, or would not want to take a course requiring a PC. Analysis of Table 10.21 shows that just over one fifth (21.6%) of respondents either could not afford to pay anything, or would not want to take a course which required a computer. Just under one third (32.3%) would be prepared to spend up to €1,000 on a PC, while another third (33.0%) would be prepared to spend between €1,001-1,500.

**Table 10.21: Willingness To Pay For PCs By Programme**

Willingness to Pay	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Can't afford	31	11.8	16	7.0	4	7.3	2	5.4	40	33.6	93	13.2
Wouldn't want PC course	39	14.8	2	0.9	6	10.9	2	5.4	10	8.4	59	8.4
<€1000	71	27.0	75	32.8	15	27.3	10	27.0	56	47.1	227	32.3
€1000-1500	86	32.7	101	44.1	17	30.9	17	46.0	11	9.2	232	33.0
€500+	36	13.7	35	15.3	13	23.6	6	16.2	2	1.7	92	13.1
Total	263	100.0	229	100.0	55	100.0	37	100.0	119	100.0	703	100.0
Gender	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Can't pay M	4	5.1	6	3.7	0	0.0	1	3.8	10	52.6	21	7.3
Can't pay F	27	14.8	10	15.6	4	7.4	1	9.1	30	30.0	72	17.5
Won't pay M	14	17.9	1	0.6	0	0.0	1	3.8	1	5.3	17	5.9
Won't pay F	25	13.7	1	1.6	6	11.1	1	9.1	9	9.0	42	10.2

Willingness to purchase computers varied substantially according to programme and mode of study. Two fifths (42.0%) of on-campus respondents would not buy a PC (33.6% because they could not afford to pay and 8.4% because they would not want to take a course requiring a PC). Among ODL respondents, BA and Nursing groups are least likely to purchase PCs. A higher proportion of BA respondents state they can't pay for a PC (11.8% compared with 7.2% Nursing, 7.0% IT and 5.4% MIT). However BA respondents are also more likely to reject a course requiring a PC (14.8% compared with 10.9% Nursing, 5.4% MIT and just 0.9% IT). When the figures are further broken down by gender it is apparent that over one quarter (27.7%) of women would not purchase a PC compared with just 13.2% of men (17.5% women can't pay compared with 7.3% of men and 10.2% won't pay compared with 5.9% of men). While there is a disparity between men and women across the programmes, there is an interesting variation in the pattern of reasons for non-purchase. For example, while just 5.1% of male BA respondents cannot afford to pay compared with 14.8% women, male respondents on this programme are more resistant to taking a PC based course, with 17.9% stating that they would not want to take a course requiring a computer compared with 14.8% of female BA respondents. It is also interesting to note that over half

(52.6%) of male respondents on the full-time on-campus programme cannot afford to buy a PC compared with under one third of female respondents (30.0%).

Finally, respondents were asked an open-ended question ‘If access to personal computers and the Internet are compulsory in educational courses, who do you think should cover the cost?’

**Table 10.22: Who Should Pay For Access To PCs And Internet By Programme**

Who should pay?	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Student	69	26.8	71	35.1	12	23.5	17	48.6	2	1.8	171	25.9
Share costs	37	14.4	37	18.3	8	15.7	4	11.4	9	7.9	95	14.4
Others Pay	151	58.8	94	46.5	31	60.8	14	40.0	103	90.4	393	59.6
Total	257	100.0	202	100.0	51	100.0	35	100.0	114	100.0	659	100.0
Gender	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Student M should pay	23	30.3	54	37.2	0	0.0	14	51.9	0	0.0	91	34.1
F	45	25.3	17	30.9	12	24.0	3	37.5	2	2.1	79	20.4

As Table 10.22 shows, just over one quarter (25.9%) of respondents consider that the student should pay, a further 14.4% consider that the costs should be shared between the student and the institution, while over half (59.6%) consider that the cost should be borne by another source (institution, government, Internet providers etc).

Responses varied between programmes, with MIT respondents (i.e. those with the highest incomes) being most likely to suggest that the student should bear the cost. Almost half (48.6%) of MIT respondents compared with just over one third (35.1%) of IT and approximately one quarter of BA (26.8%) and Nursing (23.5%) respondents agreed that students should bear the cost. It is interesting to note that nine out of ten on-campus students (90.4%) felt that the cost should be borne by other institutions or organisations and only 1.8% considered that the student should pay. The response with regard to student payment was further broken down by gender. Male respondents were more likely to agree that students should pay (over one third (34.1%) compared with one fifth (20.4%) of females). This disparity persisted among male and female BA, IT and MIT respondents. The male/female disparity in the Nursing and on-campus groups does not emerge in view of the small number of males in the nursing cohort and the small number of on-campus respondents (2 in total) who considered that students should pay.

The key points to emerge from examination of respondents’ attitudes to payment for the basic tools required to utilise new forms of learning is that there is a sizeable group (approximately one quarter) who can’t or won’t pay for access, and an even larger group (almost three quarters) who consider that the student should not have to bear the cost of access alone. However, students are not a homogenous group, and the figures show that some groups are more likely to be amenable to investing in the technology: e.g. post-graduate level respondents, and those taking IT programmes are more likely to invest than humanities and on-campus students. It is therefore likely that a ‘one size fits all’ approach will be unsuccessful and that institutions must tailor their approaches to the financial and attitudinal circumstances of their target audiences.



## **10.8 ATTITUDES TO EU ROLE IN EDUCATIONAL POLICY-MAKING**

*Technology is not only required but essential in modern education. But involvement of the EU in the Irish education system would be very worrying at any level. Male IT Respondent*

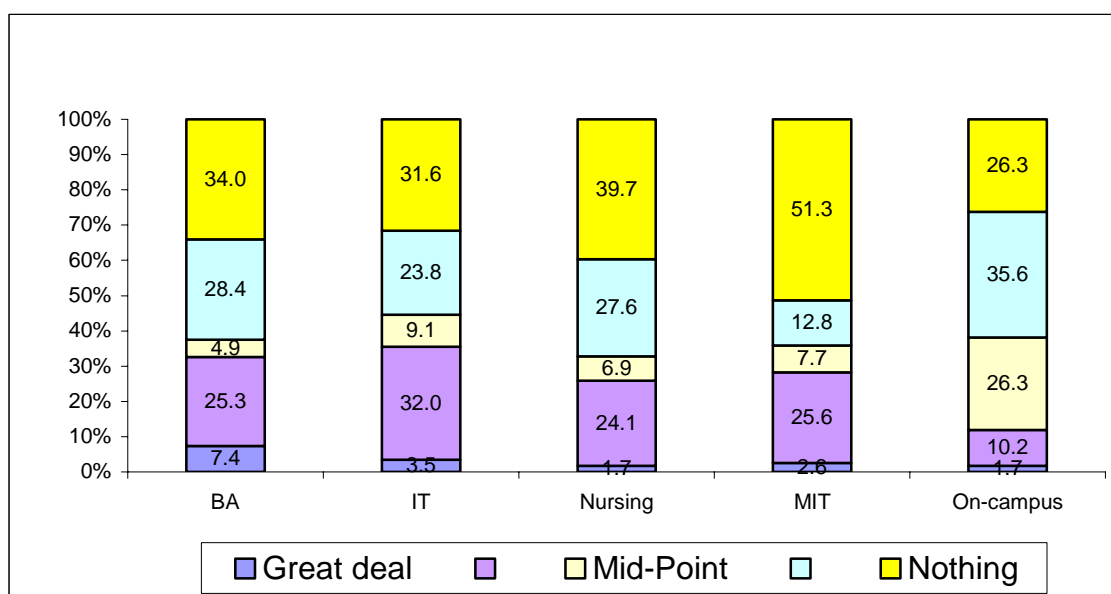
*Technology should be considered as a tool for helping people reach their potential The EU needs a qualified workforce if it is truly to become an international economic and social force for good. Not just for the people of the EU but for all people. Male IT Respondent*

### **10.8.1 AWARENESS OF THE EU**

This chapter started by posing the question: ‘How do EU policies on ICTs in education resonate with students? The previous sections have dealt with the question of how respondents react to technology in education. In this section, their response to the EU’s role in educational policy-making is analysed. Students were asked a number of questions designed to test their knowledge of the EU, their attitudes to the EU project, and finally their response to EU involvement in the specific area of education policy.

Respondents were asked to rate their knowledge of the European Union on a scale of 1 to 10, where 1 meant that the respondent knew nothing at all and 10 meant they knew a great deal. This is a standard question used on most Eurobarometer questionnaires. For ease of analysis, the ten-point scale was reduced to five categories (1-2 = no knowledge; 3-4 minimal knowledge; 5-6 moderate knowledge; 7-8 high level of knowledge; 9-10 great deal of knowledge). The response is illustrated graphically in Figure 10.4 below.

A survey of the Irish adult population in November 2002 found that 12% rated their knowledge in the highest categories (Sinnott, 2003). In contrast, respondents to this survey regarded themselves as more informed with IT and BA respondents rating themselves best informed. Approximately one third (35.5%) of IT respondents and BA (32.7%) respondents rated themselves as having a high level of knowledge or great deal of knowledge compared with approximately one quarter of Nursing (25.8%) and MIT (28.2%) respondents. It is of interest to note that only 11.9% of on-campus students rate themselves in the top two categories of knowledge. At the other end of the spectrum, MIT respondents were most inclined to rate themselves as having little or no knowledge of the EU. Over half (51.3%) of MIT respondents rated themselves in the lowest category, compared with in the region of one third in each of the other ODL programmes (39.7% IT, 34.0% BA and 31.6% IT). Over one quarter (26.3%) of on-campus students rated themselves in the lowest category of knowledge. Among the possible explanations for these differences would be the different cultural backgrounds between the ODL respondents (mostly Irish) and the on-campus respondents (mostly UK). A study of 1,000 British students in the early 1990s found that they were largely ignorant of the EU’s institutional structures and sceptical about specific EC policies (Allington and Jones, 1994).

**Figure 10.4: Self rated knowledge of the European Union by Programme of Studies**

Respondents were also asked a number of specific questions on the EU, including the number of MEPs representing Ireland (15) or Northern Ireland (3) and the method of electing the European Parliament. As Table 10.23 demonstrates, respondents were better informed about the method of election than about the number of MEPs. Over half (51.4%) correctly stated that MEPs were directly elected by citizens, while only 16.6% were able to give the correct number of MEPs. On-campus respondents appeared to be least informed in both cases, with just 2.6% listing the correct number of MEPs and only 12.8% giving the correct method of election. Levels of knowledge varied somewhat between ODL programmes, with BA respondents more inclined to provide the correct answer for number of MEPs (23.8% compared with 17.0% of Nursing, 15.4% of IT and 13.2% of MIT). Over three quarters (76.9%) of MIT respondents knew the correct method of election compared with almost two thirds of BA (64.3%), over half of IT (54.8%) and just 37.0% of Nursing respondents.

**Table 10.23: Knowledge of Number of MEPs and Method of Election by Programme**

Number of MEPs	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Don't know	134	48.4	121	54.8	35	66.0	21	55.3	104	90.4	415	58.9
Gave incorrect number	77	27.8	66	29.9	9	17.0	12	31.6	8	7.0	172	24.4
Gave correct number	66	23.8	34	15.4	9	17.0	5	13.2	3	2.6	117	16.6
Total	277	100.0	221	100.0	53	100.0	38	100.0	115	100.0	704	100.0
Election to EU Parliament	BA		IT		Nursing		MIT		On-campus		Total	
	N	%	N	%	N	%	N	%	N	%	N	%
Don't know	46	16.6	48	21.7	11	20.4	3	7.7	66	56.4	174	24.6
Gave incorrect answer	53	19.1	52	23.5	23	42.6	6	15.4	36	30.8	170	24.0
Gave correct answer	178	64.3	121	54.8	20	37.0	30	76.9	15	12.8	364	51.4
Total	277	100.0	221	100.0	54	100.0	39	100.0	117	100.0	708	100.0

## 10.8.2 ATTITUDE TO THE EU PROJECT

Respondents were asked a series of questions to assess their attitude to the European Union project. These included the respondents' level of attachment to Europe, whether membership of the EU was a good thing, whether the country had benefited from membership, whether the EU conjured up a positive or negative image, the extent to which they were in favour of unifying Europe and extending membership to additional countries, and finally the extent to which they were in favour of the common currency. The responses are summarised in Table 10.24, broken down by programme as well as by nationality. As can be seen there are clear differences between Irish and UK respondents' attitudes to the EU, with the UK respondents in each case being less positive than the Irish respondents. This mirrors the pattern of responses to Eurobarometer surveys where Irish respondents have been consistently more favourable to the EU project than UK respondents. As Table 10.24 shows, almost two thirds (65.4%) of Irish respondents compared with 42.0% of UK respondents are very or fairly attached to Europe. Over three quarters of Irish respondents consider that membership of the EU is a good thing, and that Ireland has benefited from membership (79.7% and 77.9% respectively) compared with less than half of UK respondents (47.8% and 39.1% respectively). While Irish respondents are more favourable to efforts to unify Europe the difference in attitude is not as marked (58.5% of Irish respondents favour unification of Europe, compared with 43.5% of UK respondents). It is interesting to note that the overwhelming majority of Irish respondents support the common currency (86.3%) compared with just 43.5% of UK respondents. In this the respondents reflect the attitudes of the general population in both countries. In the next section, the attitudes of respondents to specific aspects of EU involvement in educational policy will be examined.

**Table 10.24: Attitudes to the EU Project by Programme and Nationality**

	% BA	% IT	% Nursing	% MIT	% On-campus	% Irish	% UK	% Total
Very/Fairly attached to Europe	67.5	69.8	58.6	82.1	40.3	65.4	42.0	63.9
Membership of the EU is a good thing	78.3	85.8	78.9	87.2	49.6	79.7	47.8	76.5
The country has benefited from membership of the EU	80.4	83.8	82.8	94.9	31.1	77.9	39.1	74.5
Very/fairly positive image of the EU	78.7	81.1	84.5	87.2	51.7	79.4	47.8	76.1
Very much for/for to some extent - efforts to unify Europe	60.7	64.2	58.6	64.1	39.5	58.5	43.5	58.4
Very much for/for to some extent - extending membership of EU	75.2	74.2	60.3	69.2	37.8	69.7	46.4	67.4
Very much for/for to some extent - the common currency	84.6	89.2	82.5	94.9	52.9	86.3	43.5	81.4

## 10.8.3 ATTITUDE TO EU ROLE IN EDUCATIONAL POLICY

*I believe IT should be used primarily to help disadvantaged students. This is where the EU can have a role in making society more equal by funding access to elearning for people with low skills base/educational levels. Male MIT respondent*

*The interaction of students in a classroom environment enhances learning. Internet connection in Ireland is too slow and too costly to promote web-based learning. The EU might not always be committed to retaining the national identity of a country when implementing education policy. Male MIT Respondent*

*It should be accessible to everyone but not take the place completely of people interaction. It would be useful to increase communication with other European countries especially at*

*school level. European influence on our education system would be an advantage especially at national/secondary level* Female BA Respondent

Respondents were presented with a list of six statements concerning EU involvement in the area of elearning policy. They were also asked to indicate the extent to which they supported the EU taking a role in harmonising education systems. Table 10.25 summarises the responses by indicating the percentage of respondents who strongly agreed or agreed with the statements. With two exceptions, the statements were couched in negative terms. For the purpose of comparison, these statements were recast as a negative statements. Examination of the figures in Table 10.25 indicates that, in general, respondents appear to be relatively favourably disposed to EU involvement in this area of policy-making, although the scale of resistance varies depending on the area of involvement as well as the role of the EU in decision-making as opposed to provision of support. The highest level of resistance was to the EU taking a role in decision-making. Over two fifths of respondents (42.2%) agreed that only Member States should decide policies on elearning in their education and training institutions. A similar proportion (40.8%) agreed that decisions on introducing ICTs in education should not be made at EU level. Over one third (35.5%) of respondents agreed that the EU should not try to influence institutions about how they teach their courses. Just under one third (32.2%) agreed that a common EU approach to ICTs in education would lead to a loss of national culture and identity. Just under one quarter (24.8%) agreed that the EU should restrict its involvement to policies for training for jobs and employment. Resistance to harmonisation of education systems (defined as making the education systems in Member States more alike) was relatively low, with just 16.5% against this policy. Finally, a very small percentage (4.3%) agreed that EU support for eLearning would not result in an improvement in education and training in the Member States.

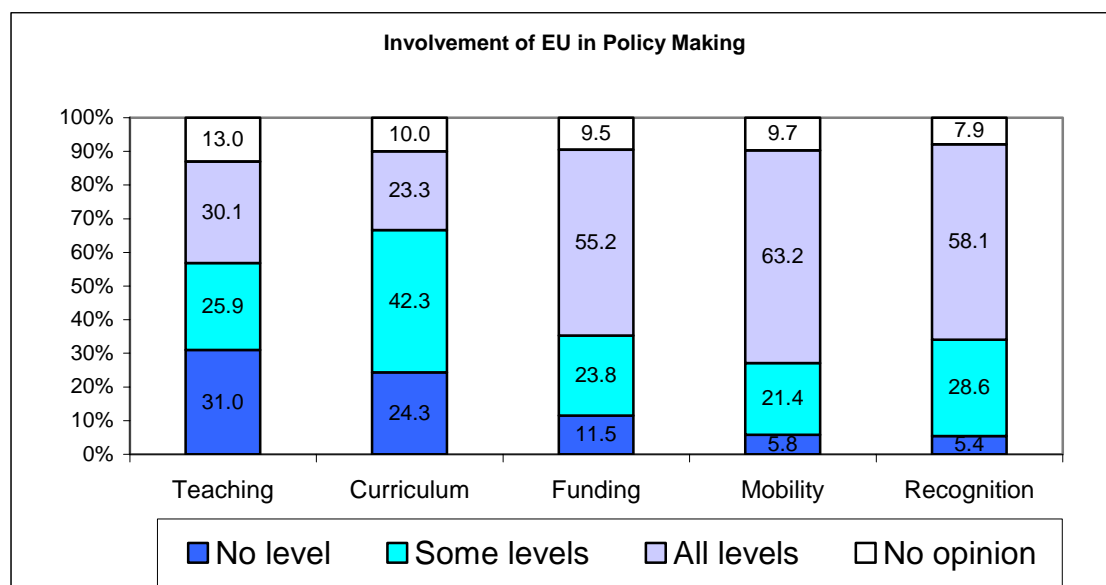
**Table 10.25: Resistance To EU Role In Elearning Policy-making By Programme**

% Respondents who strongly agreed or agreed with the following statements:	% BA	% IT	% Nursing	% MIT	% On-Campus	Total	%
Only the Member States should decide policies on eLearning	43.8	43.0	43.9	28.2	40.5	304	42.2
Decisions on introducing ICTs in education should [not] be made at EU level	45.4	37.6	39.3	48.7	34.2	296	40.8
The EU should not try to influence institutions about how they teach their courses	42.6	32.3	29.1	35.9	27.4	257	35.5
Common EU approach to ICTs in education would lead to loss of national culture and identity	33.6	24.6	35.1	46.2	37.9	234	32.2
The EU should restrict its involvement to policies for training for jobs and employment	23.2	27.1	26.8	33.3	20.5	180	24.8
Not in favour of harmonisation of education systems	14.4	15.2	12.5	25.6	23.1	121	16.5
EU support for eLearning may [not] result in an improvement in education and training in the Member States	6.6	2.2	5.3	2.6	2.6	31	4.3

Respondents were asked to indicate at what level (school level, higher education, vocational education and training, adult education), they considered the EU should have a role in deciding policy in the areas of curriculum, recognition of qualifications, funding, teaching methods, and student mobility. Figure 10.5 shows that a minority of respondents could be regarded as strongly resistant to EU involvement. Just under one third (31.0%) of respondents would reject EU involvement in teaching methods, and under one quarter (24.3%) would reject involvement in deciding on curriculum. Resistance to EU involvement in funding, student mobility and recognition of qualifications was lower (11.5%, 5.8% and 5.4% respectively rejected the idea of EU involvement in these areas at any educational

level). The areas in which there was most support for EU involvement at all levels was in mobility (63.2%), recognition of qualifications (58.1%) and funding (55.2%).

**Figure 10.5: Attitude to EU involvement in Educational Policy-making**



## 10.9 SUMMARY AND CONCLUSIONS

This chapter has discussed the findings of a survey of students' attitudes to ICTs in European education, carried out in late 2002. The questionnaire sought to answer the question 'how do EU policies on eLearning and ICTs resonate with students?' This is now a matter of perhaps belated concern to the EU in view of the relatively slow uptake of elearning approaches in many institutions. The survey covered five main areas: access to technology; expertise in using technology; experience of technology in education; attitudes to using technology in education; and attitudes to the role of the EU in education policy. A total of 751 students taking ODL and on-campus programmes in Ireland and the UK responded to a postal questionnaire survey. Respondents were classified into three broad categories: ODL technical, comprising largely male students, aged between 23 and 40, in employment, taking IT courses to improve their qualifications; ODL non-technical, comprising mostly female students, aged between 30 and 50, taking humanities courses largely for personal interest, or nursing courses to improve their qualifications; on-campus non-technical, comprising mostly female students, aged under 23 years, taking a psychology degree, motivated by career objectives.

This survey found that effectively 100% of respondents had access to PCs and the Internet at their university with just 6.8% having access to PCs and 15.8% to the Internet only at the university. Over half (53.4%) had extensive access (i.e. at home/work/university) to PCs and 39.1% have extensive access to the Internet. Some 39.8% had restricted access (i.e. home and university only) to PCs and 45.1% had restricted access to the Internet. However, the level of access to technology varied by programme and mode of study. BA respondents were most likely to have restricted access to PCs and Internet (46.5% have extensive access compared with 78.7% of IT respondents). Women experienced more restricted access to technology than men. Almost two thirds (64.9%) of men compared with less than half (45.5%) of women had extensive access to PCs. Just under half (49.3%) of men compared with less than one third (31.8%) of women have extensive access to the Internet. The level and location of access to technology also varied by age, prior educational level and

economic status and programme. Access to technology declines among older age groups, among those with second level education only, and among those who are out of the paid workforce.

Despite the apparent widescale access to the technology, further analysis revealed disparities in the quantity and quality of access. For optimum use of elearning technologies, students require flexibility with regard to time and location of access. Yet, four out of every five (82.2%) on-campus students reported problems in accessing PCs at the university. Of these, 82.8% referred to restricted opening hours, while 41.4% found that there were not enough PCs to go around. Of concern, in view of the potential of ODL and elearning for lifelong learning, there were considerable restrictions on ODL respondents using work-based PCs for educational purposes. Less than half of BA respondents could access work-based computers for educational purposes, compared with almost three quarters (74.6%) of IT respondents. Of those respondents permitted to use PCs at work, only 32.0% had no time restrictions, while almost two thirds (62.9%) were restricted to using PCs outside working hours. Just over one quarter of respondents actually owned a home based PC. However, of the 67.4% who shared a home based PC, just 5.5% reported that they had problems in using the PC when they wanted it.

The survey revealed variations in technological expertise. The majority of respondents were confident in their ability to use wordprocessing (87.7%), email (88.1%), and Internet browsers (93.7%). However they were less confident in their skills in using spreadsheets (68.3%), bibliographic databases (62.8%), or presentation manager software (53.5%). Just over one fifth (22.7%) could use computer conferencing unaided. Two fifths of respondents (41.9%) had no formal training in IT, while 15.5% had taken the ECDL and a further 42.6% had received some form of training course. Comparisons with respondents to a survey of full-time students in twelve universities throughout Europe found that ODL respondents were in the lower levels of technology expertise, however, that survey also found variations in expertise among traditional universities, arising from different institutional practices on the development of ICT skills (SPOT+, 2003).

Almost two thirds of respondents had used the Internet at least once per week in the previous three months to access educational material and prepare assignments. On-campus students reported greater use of email to contact fellow students and tutors than ODL students. They were also more inclined to use technology for accessing educational materials and preparing assignments than ODL students. ODL IT students and on-campus students reported higher levels of involvement in online educational activities than ODL BA or nursing respondents.

Attitudes to technology were gauged through factor analysis which identified three main factors related to respondents' attitudes to technology: computer confidence; valuing of ICTs in society in general; and concerns with the negative impact of technology on learning and pedagogy. ODL IT respondents scored higher on the computer confidence score than either ODL BA or Nursing or on-campus students. Some 90.5% of ODL IT respondents scored in the high computer confidence category, compared with 52.4% of BA and 43.1% of on-campus respondents. Over three quarters of men (75.4%) were in the high computer confidence category compared with just 55.6% of women.

Over half (52.3%) of respondents placed a high value on ICTs in general, with ODL IT, MIT, and Nursing respondents more positive than ODL BA and on-campus students. While



just 17.2% of respondents considered that ICTs would have a negative impact on learning and pedagogy, just over one quarter (25.2%) felt that ICTs would actually improve learning. The remaining 57.6% felt that at best ICTs would have a neutral effect. Again, ODL BA respondents were most negative about the impact of ICTs (26.1% of ODL BA respondents considered that ICTs would have a negative impact compared with 9.1% of ODL IT and 11.0% of on-campus students). Comparison with the SPOT+ survey showed that ODL respondents were less likely than most on-campus students in the twelve universities to agree that ICTs would improve their learning, although levels of support for ICTs varied considerably between universities.

Respondents judged the potential of ICTs to extend access to those in remote regions and to disadvantaged students as most important; almost three quarters (74.9%) of all respondents rated access from remote regions to higher education as important or very important. However there was less support for using technologies to change learning approaches in education. Just over one third (35.4%) felt that development of autonomous learner centred approaches in higher education was important; 29.2% agreed that collaboration between students in other countries was important and only 14.9% thought that a more collaborative and less individual approach to learning was important.

There was an overwhelming support for using ICTs to enhance rather than replace existing forms of learning. Thus ODL respondents were inclined to choose ODL enhanced with online support as their first preference while on-campus respondents tended to select on-campus education enhanced with online support as their first preference. Over two thirds (69.2%) of respondents opted for technology enhanced forms of education as their first preference, however, only 11.6% of all respondents ranked elearning (defined as a mix of written course materials, online materials, online tutorial support and interaction with other students and tutors) as their preferred mode of study. However, almost one fifth (19.2%) of respondents could be classified as totally resistant to learning with technology. There was resistance to removing face-to-face and personal contact from the learning experience even among those who were supportive of technological enhancement.

Over one fifth (21.6%) of respondents either indicated that they would be unable to afford to pay for a PC (13.2%), or wouldn't want (8.4%) to take a course requiring a computer. One quarter (25.9%) of respondents felt that students should fund access to technology or contribute to the costs (14.4%). However, over half (59.6%) felt that the cost should be covered by others (the university, government or employers).

Irish respondents tended to be more positive about the EU and its impact than were UK respondents. For example over three quarters (79.4%) of Irish respondents compared with less than half (47.8%) of UK respondents held a positive image of the EU. Respondents were less resistant to the EU having a role in educational policy-making with regard to funding (11.5%), student mobility (5.8%) and recognition of qualifications (5.4%). However, they were more resistant to EU involvement in deciding teaching (30.0%) and curriculum policy (24.3%).

What then are the implications of these findings for institutions and EU policy makers? It is interesting to note the way in which the fears and concerns about elearning expressed in this survey are echoed in the following statement on elearning by ESIB – the National Unions of Students in Europe, representing mainly on-campus students:

ELearning will be an issue of the future that will need to be addressed, however there will need to be close monitoring of the future of eLearning. It is currently seen as the answer to all the potential problems that currently face education, whether being perceived as enabling access or being seen as a cheap way of delivering education to a large number of people. Whilst there is a grain of truth in some of these claims, it is not the entire situation by any means. There must remain the importance of the value of physical mobility and having real contact with the teachers and the support structures associated with traditional HEIs and education systems. ELearning has some benefits in the context of higher education, however Virtual Mobility does not exist as it is the education rather than the student which is moving.

ELearning will be a valuable tool in some cases such as facilitating lifelong learning and ensuring greater access to traditional education but should not be seen as a replacement for it. It will also play a role as an addition to traditional learning through access to information and other aspects. When it comes to the question of eLearning, in the future, the issue of quality and quality assurance will become a centre point of discussion. A need for discussing the quality issues and finding necessary tools is fairly obvious.

Since eLearning will be further developed, it is necessary that the question of access of individuals to infrastructures is resolved not to create a technology gap between different regions in and beyond Europe. Further more, it should be noted that eLearning stipulates the necessity to devise new teaching and learning paradigms and that investment into hardware has to be met by investment into teacher and student training, and design of teaching modules to help to make eLearning a beneficial learning arrangement (ESIB, 2003).

These concerns are indeed reflected in the results of the survey analysed in this chapter. The figures show that access to PCs and the Internet is available, in theory to all respondents. However, it becomes obvious when investigating the quality and availability of access that there are many forms of digital divide. If programmes are designed on the assumption that students have unlimited access at any time, any place, to the appropriate technology then this scenario does not reflect the actual circumstances of real students, particularly those who are unable to attend on-campus. Furthermore, the skills gap becomes apparent with students unfamiliar with some of the basic skills required to participate in online learning. Even where access and expertise do not pose a barrier, a number of students will resist removal of some form of face-to-face contact in the learning experience. There is considerable support for the use of technology as an enhancement, not a replacement for good traditional forms of education. Finally, the survey shows that respondents are relatively positively disposed towards the EU taking a role in educational policy, by supporting and encouraging developments, but leaving decision-making at national and institutional level. There is more resistance to EU involvement in decision-making with regard to curriculum and teaching methods, than in funding and recognition of qualifications.

One of the key findings from this survey is that students are not a homogenous mass of end users and that disciplinary, attitudinal, and institutional differences affect the degree of receptivity to new technologies. Many surveys of student attitudes to technology focus on a group within one discipline (often IT based courses, or educational technology) and they do not take a comparative perspective. In this study, it is apparent that groups studying technology-based disciplines continue to be more favourably disposed to using technology than those in non-technical disciplines. The challenge for institutions is to develop models which fit in with the reality of students' expectations, expertise, and personal circumstances. Students welcome the enhancements that technology offers including access to resources, and communication with students and tutors. However they fear the loss of human contact and indeed flexibility arising from an overly prescriptive application of technology. The cost

element and who pays is also of concern. Students motivated by extrinsic motivations may be more prepared to pay for the cost of technology than those taking courses for more intrinsic motivations.

Of concern to institutions and EU policy-makers is the level of resistance to technologies among up to one fifth of respondents and residual disquiet among an even greater proportion. It should be recalled that many students take ODL programmes because there is no other option available to them because of their life stage, domestic circumstances or location. If policies are introduced which serve to erect further barriers to participation, the pioneering work of ODL in extending access to education on a lifelong learning basis will have been severely undermined. The EU can use its powers to persuade students of the benefits of the new technologies, only if those benefits are actually realised and demonstrated through successful, sustainable programmes, presented in real-life situations, and the real concerns and fears of students are listened to and addressed.

## Chapter 11: Summary and Conclusions

### 11.1 INTRODUCTION

As this thesis has shown, distance education evolved as a major player in providing second chance education in the 1970s in Europe. It also pioneered, of necessity, the use of a range of media to deliver education to students who were unable to attend on campus. Distance education entered the mainstream of EU policy-making in the late 1980s when it was seen as the solution to a range of problems besetting the EU at the time. Regrettably, with the exception of Tait (1995) and Hodgson (2002), there has been no systematic attempt to evaluate the role of distance education in the EU policy-making apparatus, or indeed, how EU involvement has impacted on distance education. Indeed, up to the early 1990s, education policy in the EU received relatively little attention from researchers, mainly, it is true, because up till then, education and training had played a relatively minor role in the EU's policy platform. The gradual accretion of soft law, which grew up around the EU's activities in education and training through a series of action plans and initiatives, culminated in Articles 126 and 127 in the Maastricht Treaty signed in 1992. These articles provided the first firm legal basis for Community action in education and training, although the principle of subsidiarity was also written into the Treaty to protect Member State autonomy. Nevertheless, researchers began to take note of the increased EU powers in this area and the volume of research on EU higher education policy has grown considerably, especially since the mid 1990s (see for example Barnard, 1995; Brine, 1995; Corbett, 2000; 2003b; De Witte, 1993; Ertl, 2003; Field, 1998; Gellert, 1993b; Hackl, 2001; Hodgson, 2002; McCann, 2001; Neave, 1994; Nihoul, 1999; Tait, 1995). The expansion in the EU's involvement in education policy is not universally welcomed. In his 1998 book on European dimensions Field states:

I do not share the assumption that the European Union, and, more particularly, its involvement in education and training, is essentially and invariably benign. If some form of supranational co-ordination is probably inevitable in a Europe which is visibly disoriented and worried by its future, then we must study the EU every bit as critically as we would examine our own government's performance (Field, 1998: vi).

This thesis represents the first study to track the course of EU policy development on distance education, starting with the inception of the EU in 1957, and finishing in 2004 with the enlargement of the Community to encompass 25 Member States. But it also extends beyond an historical examination of the key milestones of EU policy-making by identifying the changing goals of these policies; the actors responsible for driving the policies; analysing the implementation of these policies; and investigating the obstacles, both technological and attitudinal, to implementation. This thesis adopted a case study approach, combining qualitative and quantitative methods; involving extensive analysis of EU documents produced between 1961 and 2004; archival research; structured interviews with key individuals in the Commission, ODL networks, and ODL providers; and a large-scale questionnaire survey of over 750 students. The following research questions formed the framework for analysis of the impact of EU policy on distance education:

- How and why did ODL and elearning evolve as an instrument of EU policy between 1957 and 2004?
- Who are, and were, the actors involved in the ODL and elearning policy development process, and to what extent do insights from political science contribute to an understanding of their role?
- Is there a gap between the rhetoric and the reality of implementation of these policies?

- What are the consequences of the technological imperative for social cohesion; is there a digital divide in Europe, and if so, what is the response from Member States?
- How do distance education and elearning policies developed by the EU resonate with students?
- What is the cumulative impact of EU policies on ODL; or to what extent has EU policy encouraged the development of distance education in Europe?

This chapter will review some of the main findings of this research before coming to conclusions on whether the EU has had a benign impact on distance education, that is, has it ‘encouraged the development of distance education’?

## **11.2 THE EVOLUTION OF ODL AND ELEARNING POLICY IN THE EU 1957-2004**

This thesis found Kingdon’s (1995) policy streams concept to be 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, and how it subsequently declined in prominence as an instrument of EU policy. Kingdon used the policy streams metaphor to explain how some ideas become accepted into the policy stream when they are matched with problems which the political stream decides it is necessary to solve. At certain stages or junctures, often triggered by crises or ‘moral panics’, a policy window opens to admit an idea into either the problem, policy or politics stream. As Chapters 4, 5 and 6 demonstrated, from the early 1960s, the problem stream turned to the education and training system to solve a range of problems including: retraining of workers from the obsolete industries; redressing disadvantage and contributing to social cohesion; contributing to the completion of the internal market; developing a Citizens’ Europe; making the process of lifelong learning a reality; stimulating growth, competitiveness and employment; and creating the Information and Knowledge Society. The Lisbon process is the most recent example of the EU turning to education and training to meet its objectives; in this case making Europe the most competitive economy in the world.

It is generally acknowledged that the importance of ODL for the EU was first recognised in 1987 by the European Parliament when it adopted a resolution on the Open Universities (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 Guidelines (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). Following an initiative from the Irish Presidency, the Commission prepared a *Memorandum on Open Distance Learning* in 1991 (CEC, 1991b); 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.

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, 2001a: 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.

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 the late 1970s. As discussed in Chapters 4, 5 and 6 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, 1987b).

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. 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.

It was the proposal to initiate a European Open University which had a galvanising effect on 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). Following an initiative of the Irish Presidency 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, 1991b). 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 been inserted into the draft Maastricht Treaty (Corbett, 1993: 304).

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 hang 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. However, by 1993 the high profile of distance education began almost imperceptibly 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 encountered a series of new as well as recurring problems, 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. By the end of the 1990s, ODL was seen as synonymous 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). According to the Director General of DG Education and Culture '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' (van der Pas, 2002: 6). In addition to the usual challenges of globalisation, competition and demographic change, 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 (see Figure 9.1 Chapter 9). 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 conclusions set explicit aims and guidelines which Member States were expected to adopt in their education policies by 2010, including reduction by 50% of 18-24 year olds with lower secondary education who are not in further education. 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>405</sup> Yet, the Commission ignores the proven potential of distance education (whether using technology or not) to meet the demand for lifelong learning, while demanding the use of technologies, usually with the unproven assertion that these will be more cost-effective, despite the known barriers of the digital divide as discussed below.

'eLearning' has been adopted as a central pillar for the achievement of the EU Lisbon strategy. However, this new policy favourite represents not just a change in terminology,

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<sup>405</sup> SCADPLUS Concrete Future Objectives of Education Systems updated 17 June 2003; available at <http://europa.eu.int/scadplus/> accessed 7 July 2004.

rather it signals a change in policy direction, away from the egalitarian concerns of distance education to redress disadvantage and extend access to higher education, to a more technocratic commitment to compelling the education and training system to adopt the ICTs for the purpose of preparing the citizens of Europe for the Information Society on a lifelong learning basis. Despite rhetorical references to the potential of the ICTs for contributing to social cohesion, the reality is that the Commission's policies are now primarily technologically driven. As Mason points out

While most of the excitement and rhetoric about virtual education is that it will serve the disadvantaged, the remote, the unemployed, and the lifelong learner, in reality, the early adopters are the opposite: employed, urban, well educated, and well off (Mason, 1999: 87).

As this thesis 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 political consciousness until the Maastricht Treaty. 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 had been mainstreamed. Little empirical evidence was found to support this view. In contrast, examination of the key documents, and interviews with Commission Officials and ODL practitioners support the contention that distance education, rather than being mainstreamed, had been submerged, and had effectively disappeared from the EU policy arena.

### **11.3 THE KEY ACTORS IN EU ODL POLICY**

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. As demonstrated in Chapter 7, 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*, 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.

Political scientists have found Haas's (1992) epistemic community and Sabatier's (1988a) advocacy coalition concepts helpful in explaining how certain policy ideas become accepted. However, this thesis found 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, 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 question is at what cost? 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, the three other networks mentioned in the Commission's *Memorandum* went out of existence in the early 1990s.

Chapter 7 established 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, it is clear that 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 disappeared from the collective memory.

As Chapter 7 concluded, a small number of policy entrepreneurs with drive and vision were responsible for spearheading ODL policy in the EU between 1987 and 1993. However, competition between networks prevented a consensus on how distance education should develop on the European stage. 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 2004 that they no longer occupied 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.

## **11.4 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. As discussed in Chapter 8 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, 2001c). 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, 2004c: 26). However, an examination of the institutions involved in these partnerships shows only one fifth of projects had partners or coordinators from ODL institutions. 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).

As Chapter 8 concluded, there is a 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. It is worthwhile revisiting Bates’s warning on the double-edged nature of the Commission’s programmes:

The importance of these programmes cannot be too strongly emphasised. They provide much needed resources for educational institutions under strong financial pressure from their own governments, and provide opportunities for trans-border activities which otherwise would not exist. They are a marvellous stimulus to innovation and technological development for learning and teaching. But they also have their dangers as well as benefits for EADTU institutions. Although support for EADTU activities has been heartening to date, we have no exclusive claim to these funds for distance teaching activities. If we do not meet the criteria - or even if we do - other institutions whom we may see as hitherto insignificant players in the distance education game are also eligible for funding. Furthermore, the policy and agenda either explicit or implicit in the EC’s



programmes are not always in harmony with the policies and agenda of individual EADTU institutions (Bates, 1990b: 17).

By 2004, ODL institutions had, indeed, largely ceased to participate in these projects, and as forecast, the Commission's policies cannot be said to be in harmony with those of distance education providers.

Nevertheless, as the case studies of project participation indicated, 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. Some ideas generated through projects became 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.

## **11.5 OBSTACLES TO ELEARNING: THE DIGITAL DIVIDE**

Despite the Commission's commitment to technological solutions there are significant obstacles to their implementation, in the form of the digital divide, and attitudinal factors which will be discussed in the next section. As stated before, one of the primary aims of distance education was to redress disadvantage by extending access to education to students who were unable to attend a campus for geographical, occupational, domestic or personal reasons. Distance education has used a wide range of methods to meet this objective, largely based on the technologies available to students and tutors. Distance education systems can only move at the same pace as their students and teachers. Even in the US, Zemsky and Massy found that the hype surrounding the elearning revolution was unwarranted since

On and off college campuses, e-learning could not take off until wide-bandwidth internet access was readily available, until smart classrooms were constructed, and until all faculty and students had access to computers (Zemsky and Massy, 2004: 8).

Chapter 9 found that access to technology in Europe is unequally distributed, despite the growth in PCs and Internet connections. There is a digital divide between Member States with over two thirds connected in the Nordic countries and the UK, compared with less than one fifth in Greece, Spain and Portugal. The latter group of countries are also those with the greatest degree of educational disadvantage. Even within countries there are structural divides based on occupation, income, educational attainment and age. All Member States have developed strategies to increase access to technology, however, most of these initiatives have focused on equipping schools with Internet connections or training teachers. There has been very little progress on ensuring that every home has access to a high-speed network. If elearning is to succeed, access to the Internet should not be an optional luxury, but should be seen as part of the package of essential services delivered to every household, such as electricity, water, telephone etc. Even when this ideal situation has been achieved, it will be seen that access to equipment and technology is not the only barrier to technology led solutions in education. The assumption underlying the 'if we build it they will come' approach (The Masie Centre, 2001) fails to recognise the role of learners' attitudes, motivations and individual circumstances as discussed below.

## **11.6 OBSTACLES TO ELEARNING: STUDENT ATTITUDES**

This thesis sought to find out how the EU's policies on ODL and elearning in Laffan's (1998) term 'resonate' with the key stakeholders who are rarely consulted: the students. It is not clear that the concentration in EU policy on increasing the supply of high technology



learning is met by a demand from the general public. A recent study of elearning in the United States has found that the assumption that 'the kids will take to e-learning like ducks to water' to be unfounded. Students 'do want to be connected, but principally to one another; they want to present themselves and their work...elearning is at best a convenience, at worst a distraction' (Zemsky and Massy, 2004: ii). Zemsky and Massy's study also finds that no viable market for elearning products had emerged in US higher education, with the exception of PowerPoint and course management systems such as BlackBoard (Zemsky and Massy, 2004: ii). Nor have the original forecasts that elearning will radically change the way subjects are taught: 'For the most part, faculty who make e-learning a part of their teaching do so by having the electronics simplify tasks, not by fundamentally changing how the subject is taught.' (Zemsky and Massy, 2004: 52). This discordance between what the policy-makers are trying to promote and what the learners actually want or can achieve is of increasing concern among educationalists, as Carey suggests:

The extent to which nations can exploit the potential economic, social and educational benefits of information technologies is dependent upon the individual citizen's perceptions of and attitudes toward that technology, the amount of access these individuals have to computers and their experience in using those technologies. Even the most aggressive national endeavors to strengthen the economy or raise educational levels through implementation of information technologies will fail if a nation's populace does not perceive computers as useful, valuable, or necessary (Carey, et al., 2002: 3)

A survey of over 750 students distributed between on-campus and distance education groups, and among different disciplines, revealed that students are not a homogenous mass of users. All students had access to PCs and the Internet in their universities and less than 10% relied solely on the university for access. However, this figure masked a range of disparities with regard to the quality and quantity of access. To attain maximum benefit from the potential of elearning, students need unrestricted access to high-speed Internet connections whenever and wherever they wish to study. Few students experience this optimum scenario. Most students experienced restrictions with regard to the time or place of access to the technology. In addition, the survey revealed that a significant proportion of students lacked the IT skills needed to fully benefit from elearning. Respondents also varied in their levels of confidence in using ITs as well as their value on ICTs in general with, as might be expected, students taking technology courses being far more positively disposed to technology than those taking non-technical subjects. Many students were concerned about the potentially negative impact of technology on pedagogy. While less than one fifth of students could be said to be actively resistant to any form of technology in education, just one in ten would welcome a totally online form of education. The majority of students wanted technology to *enhance*, rather than *replace*, their current form of learning, whether distance education or on-campus. Respondents were generally favourably disposed to the EU and welcomed its involvement in funding and mobility programmes. However, there was considerable resistance to EU involvement in dictating teaching methodologies in the Member States.

The key message here is that there is no 'one size fits all solution' and what may be appropriate for younger students taking technology courses for work related reasons will not appeal to older students taking humanities subjects for personal interest. Distance educators and policy makers must take into account the reasons why students take distance education programmes: they need the flexibility of studying at their own pace, at a time of their choosing, and in a place of their choosing. Computers, the Internet, print, audio-visual materials are all means to achieving these ends, but they are not the driving force.

## 11.7 ENCOURAGING DISTANCE EDUCATION?

This thesis sought to establish to what extent the EU has ‘encouraged the development of distance education’ in Europe. Interviews with Commission officials confirm that the Commission view is that ODL and elearning have been mainstreamed in the general education and training system, although no systematic evidence has been produced to indicate that this is the case, and recent research from the US would dispute these views. The problems which distance education was originally designed to address remain. While the number of ‘second chance’ students is reducing, they are being replaced by increasing numbers of ‘lifelong learners’ who need flexible and accessible opportunities for learning new skills, upgrading qualifications, or generally pursuing personal development goals. The Lisbon objectives include increasing the percentage of those aged 25 to 64 participating in education and training, yet, there are no references to the potential of ODL or elearning in meeting these objectives.<sup>406</sup>

Almost imperceptibly, the Commission has, with the turnover in key officials, experienced a form of policy amnesia about the original egalitarian role of distance education and its contribution to redressing disadvantage and contributing to social cohesion. Despite the rhetoric of lifelong learning, and social cohesion, ODL has almost vanished off the policy agenda as a separate form of education. The Commission has ceased to consider distance education as a means of providing lifelong learning opportunities to adults, while compelling initial education, mainly at first and second level to adopt new technologies in teaching and learning. A recent survey suggests that most universities in Europe are using technology to varying degrees in teaching on-campus students (PLS Ramboll, 2004). However, the use of technology does not automatically extend access to off-campus students. If the course of EU policy in ODL can be seen as a process of mainstreaming it is arguable that this process is only partial. What has been mainstreamed is the use of technology in education; however, it is debatable if the flexibility which distance education offered off-campus students has been mainstreamed in the conventional system. It is ironic that already privileged on-campus students are the beneficiaries of the investment in technology.

The Commission’s policy is characterised by a faith in technological solutions, while ignoring the real problems of implementing elearning; inequalities in access, the disputed pedagogical and cost benefits of much of what passes for elearning; as well as resistance not only from students but from academics as well, to what is perceived as a potential threat to the quality of the teaching and learning experience. It is interesting to note that the Sixth Framework programme has adopted the terminology of ‘technology enhanced learning’ rather than elearning or distance education for one of its action lines. This thesis suggests that this is the kernel of the problem. Distance education has always used technology to *enable* those who were unable to, or did not wish to, attend conventional campus-based education, to learn and acquire qualifications. In doing so it has chosen appropriate and available technologies. The demographic decline in most of Europe has led to reducing enrolments in conventional age students, causing universities to target mature students as a potential market. However, if universities and policy makers believe that mature students will provide a convenient source of enrolments to replace younger students in full-time on-campus education, they will fail to acknowledge the reality of adults’ lives. Not all adults can afford the financial, domestic and emotional disruption involved in studying full-time on-campus. Technology is not the solution to the problem if other aspects of flexible provision characteristic of most distance education systems are absent: modularisation,

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<sup>406</sup> SCADPLUS Concrete Future Objectives of Education Systems. Last Updated 17 June 2003 available at <http://europa.eu.int/scadplus/> accessed 8 July 2004.

credit accumulation, paced assessment, and above all, use of accessible and affordable media to deliver learning at a time and place convenient to the student.

Has the EU succeeded in encouraging the development of distance education in Europe to the extent that no further action is required? It would appear that the Commission considers that this is the case since the plans for the new generation of action programmes in education and training, while proposing an 'ICT action' make no provisions for an action on ODL or indeed elearning (CEC, 2004a). Despite protestations that the new elearning drive has recognised 'the need to move beyond the technocratic view of technology and education' (Reding, 2003a) there is little evidence to show that this is actually the reality. The new ICT action will once again focus on 'innovative' uses of the new technologies, while the other actions in the proposed programmes have no specific proposals to meet the special needs of adult students studying at a distance. There are good arguments to support programmes testing out high-risk next generation technologies which may never be implemented. However, there are equally good arguments to insist that space should be afforded to testing and embedding good pedagogical practice through using the affordable, accessible technologies which are available to current ODL practitioners and students operating in the world of today. While many national governments are funding such efforts on a national level, the absence of EU support removes the scope for the European dimension, and transnational exchange of ideas and expertise is thereby reduced if not lost entirely.

The information and communications technologies have transformed many aspects of economic and social life in the latter part of the twentieth century, and education must prepare students to work in a society that requires technological literacy. However, there are real concerns that the introduction of the ICTs in distance education will lead to a digital divide, and will serve to increase, rather than reduce, social exclusion. The issue of cost and pedagogical effectiveness of the new technologies is still a matter for debate, and there is by no means any certainty, as this thesis and other research has shown, that students will universally welcome elearning approaches (Clegg, et al., 2003; MacKeogh, 2003; Zemsky and Massy, 2004). As discussed above, part of the original mission of ODL (or at least state funded ODL) was to redress unequal access. Through lower fees, open access policies and flexible presentation, adults were offered a 'second chance' to enter higher education. Yet across Europe, access to technology is divided on the basis of income, occupation, class, educational attainment and geographical location. As pointed out in Chapter 9, the danger is that by increasing the entry price to education through the requirement to have access to the Internet and a PC, as well as the skills to use the new technology, ODL institutions could lose their 'market' among the disadvantaged while replacing it with a more affluent clientele of lifelong learners, interested in updating skills in the context of the Information Society.

There is, therefore, a tension between policy makers imposing innovation from a top-down perspective and the concerns of potential adopters – institutions, teachers and students. The successful adoption of ICTs in education requires a receptive environment which includes access to the technology, expertise and efficacy, and positive attitudes to learning with technology. It is suggested that much more needs to be done to resolve the most appropriate use of technology in distance education, and also to demonstrate that there is more to innovation than just using technology. The European Union has certainly encouraged experimenting with the use of technology in education, but traditional learners appear to have been the major beneficiaries of this encouragement. It cannot be argued that the EU has sufficiently encouraged the use or expansion of distance education in the Community. Indeed, rather than being mainstreamed in 2004, ODL has actually been submerged in EU policy discourse beneath the rhetorical weight of the Information Society with its constant recourse to technological fixes for social and economic problems.

## **11.8 FUTURE DIRECTIONS**

This thesis has documented the onset of policy amnesia at EU level with regard to its commitment to encouraging the development of distance education. The post-Maastricht period saw many political and economic changes in Europe. Education and training policy expanded within the renewed lifelong learning paradigm and has become a central pillar of the Lisbon process. Distance education should be one of the key instruments in achieving the objective of bringing learning closer to home, and contributing to social cohesion in the context of lifelong learning. Yet, the Commission's assumption that a commitment to extending access to off-campus learners has been mainstreamed in higher education institutions is unduly optimistic and unfounded. Further encouragement and support is essential to ensure that distance education survives in the long term as an instrument of national and EU policy. In the immediate future, research is required to monitor the scale of participation in distance education programmes in Europe as well as the impact on society and community of participation in these programmes. Other areas to be investigated include: the cost and pedagogical effectiveness of a range of new as well as older technologies; obstacles to participation in the form of attitudes, expertise, and access to technologies; support and guidance for students; training of academics, administrators and technologists; and political and financial support mechanisms.

Over the years, various reports and recommendations have suggested the establishment of a European institution with varying degrees of responsibility for distance education. It is perhaps now timely to revisit the possibility of establishing a European Institute, similar in structure to the European University Institute in Florence, which would form a permanent forum for research and development in distance education within a lifelong learning paradigm. Had a foundation for distance education been established in the early 1990s, with a remit to monitor developments in ODL at a European level, it is possible that distance education might not have slipped from the policy arena to the extent that it has. It may be ironic that the distance education institutions' resistance to the idea of a separate ODL institution at European level has served to diminish rather than enhance the position of distance education in Europe today. It is hoped that the findings of this thesis will form a 'wake up' call for distance education institutions as well as policy-makers at EU and national level on the need to re-evaluate and renew the commitment to encouraging the development of distance education as a key pillar for achieving social cohesion in Europe within a lifelong learning paradigm.

## References and Bibliography

### Arrangement

- A. References Cited in the Text
- B. EU Documents
  - B.1 Treaties/Acts
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  - B.3 Council Resolutions And Decisions
  - B.4 European Parliament Committee On Youth, Culture, Education, Information And Sport Opinions And Recommendations
  - B.5 European Parliament Committee On Culture, Youth, Education And The Media Opinions And Recommendations
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  - B.8 Committee Of The Regions Opinions
- C. Archives
- D. Secondary Sources
  - D.1 Newsletters
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#### **B.4 European Parliament Committee on Youth, Culture, Education, Information and Sport Opinions and Recommendations**

- 1987 *Report on Open Universities in the European Community drawn up on behalf of the Committee on Youth, Culture, Education, Information and Sport, rapporteur Mrs Winifred Ewing (A2-69/87) Luxembourg: OOPEC.*

#### **B.5 European Parliament Committee on Culture, Youth, Education and the Media Opinions and Recommendations**

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- 1997 Resolution on the Information Society, culture and education. OJ 0151. Debated 13 March 1997.
- 1997 Resolution on the Commission *Green Paper: education, training and research. The obstacles to transnational mobility*. OJ 0094. Debated 14 May 1997.
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## **B.7 Economic and Social Committee Opinions**

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## **B.8 Committee of the Regions Opinions**

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- 2001 Opinion of the Committee of the Regions of 19 September 2001 on the *Report from the Commission: The Concrete Future Objectives of the Education System*. COM(2001)59 Final. COM-7/033. Brussels, 23 October 2001.
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## **C. Archives**

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Glyn Martin personal papers, Open University, United Kingdom  
Chris van Seventer personal papers, Heerlen, The Netherlands.

## **D. Secondary Sources**

### **D.1 Newsletters**

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### **D.2 Theses**

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## Appendix 1: Text of EU Treaties Relating to Education and Training

- Treaty of Rome signed 25 March 1957<sup>407</sup>
- Maastricht Treaty signed 7 February 1992; took effect 1 November 1993<sup>408</sup>
- Amsterdam Treaty signed 2 October 1997 took effect 1 May 1998<sup>409</sup>
- Nice Treaty 2001<sup>410</sup>
- Draft Treaty Establishing a Constitution for Europe; Adopted by Consensus by the European Convention on 13 June 2003. Submitted to the President of the European Council in Rome 18 July 2003 2003/C 169/01

### Part 1: Principles

#### Article 2 (Rome)

The Community shall have as its task, by establishing a common market and progressively approximating the economic policies of Member States, to promote throughout the Community a harmonious development of economic activities, a continuous and balanced expansion, an increase in stability, an accelerated raising of the standard of living and closer relations between the States belonging to it.

#### Article 2 (as amended in Maastricht)

The Community shall have as its task, by establishing a common market and an economic and monetary union and by implementing the common policies or activities referred to in Articles 3 and 3a, to promote through the Community a harmonious and balanced development of economic activities, sustainable and non-inflationary growth respecting the environment, a high degree of convergence of economic performance, a high level of employment and of social protection, the raising of the standard of living and quality of life, and economic and social cohesion and solidarity among the Member States.

#### Article 2 (as amended in Amsterdam and Nice)

The Community shall have as its task, by establishing a common market and an economic and monetary union and by implementing common policies or activities referred to in Articles 3 and 3a, to promote throughout the Community a harmonious, balanced **and sustainable** development of economic activities, a high level of employment and of social protection, **equality between men and women**, sustainable and non-inflationary growth, a high degree of **competitiveness and** convergence of economic performance, **a high level of protection and improvement of the quality of the environment**, the raising of the standard of living and quality of life, and economic and social cohesion and solidarity among Member States' (bold indicates added material).

A new 'recital' in the preamble to Article 2 was inserted in the Amsterdam Treaty and adopted in Nice:

DETERMINED to promote the development of the highest possible level of knowledge for their peoples through a wide access to education and through its continuous updating

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<sup>407</sup> Text downloaded from scanned version of text as published in *Official Journal* Traites 1957/CEE volume 1, EN (available on request from Office for Official Publications of the European Union, Dissemination Unit, Products Section).

<sup>408</sup> Maastricht Treaty <http://europa.eu.int/en/record/mt/>

<sup>409</sup> Treaty of Amsterdam 1997 OJ C340 40 10 November 1997

<sup>410</sup> Treaty of Nice 2001 OJ C 80 10 March 2001

### **Article 3 (Maastricht, Amsterdam, Nice)**

For the purposes set out in Article 2 the activities of the Community shall include, as provided in this Treaty and in accordance with the timetable set out therein:

Art3 (p) Maastricht Art 3 (1.q) Amsterdam and Nice:

A contribution to education and training of quality and to the flowering of the cultures of the Member States

### **Article 3b (Maastricht, Amsterdam and Nice)**

The Community shall act within the limit of the powers conferred upon it by this Treaty and of the objectives assigned to it therein. In areas which do not fall within its exclusive competence, the Community shall take action, in accordance with the principle of subsidiarity, only if and in so far as the objectives of the proposed action cannot be sufficiently achieved by the Member States and can therefore, by reason of scale of effects of the proposed action be better achieved by the Community. Any action of the Community shall not go beyond what is necessary to achieve the objectives of this Treaty.

### **Part 3:**

Title III: Free movement of persons, services and capital (Rome)

Replaced by:

Title VIII: Social Policy, Education, Vocational Training and Youth (Maastricht)

Replaced by:

Title XI: Social Policy, Education, Vocational Training and Youth (Amsterdam & Nice)

## **Chapter 1: Social Provisions**

### **Article 118 (Treaty of Rome)**

Without prejudice to the other provisions of this Treaty and in conformity with its general objectives, the Commission shall have the task of promoting closer collaboration between Member States in the social field, particularly in matters relating to:

- Employment;
- labour law and working conditions;
- basic and advanced vocational training;
- social security;
- prevention of occupational accidents and diseases;
- occupational hygiene;
- the right of association, and collective bargaining between employers and workers

To this end, the Commission shall act in close contact with Member States by making studies, delivering opinions, and arranging consultations both on problems arising at national level and on those of concern to international organisations. Before delivering the opinions provided for in this Article, the Commission shall consult the Economic and Social Committee.

### **Article 118 (amended Maastricht); renumbered Article 137 Amsterdam and Nice**

Reference to basic and advanced vocational training omitted.

## **Chapter 2: The European Social Fund**

### **Article 123 (Treaty of Rome)**

In order to improve employment opportunities for workers in the common market and thus contribute to raising the standard of living, a European Social fund is hereby established in accordance with the provisions set out below; it shall have the task of rendering the employment of workers easier and of increasing their geographical and occupational mobility within the Community.

### **Article 123 (amended Maastricht); renumbered Article 146 Amsterdam and Nice**

In order to improve employment opportunities for workers in the **internal market** and to contribute thereby to raising the standard of living, a European Social Fund is hereby established in accordance with the provisions set out below; it shall aim to render the employment of workers easier and to increase their geographical and occupational mobility within the Community, **and to facilitate their adaptation to industrial changes in production systems, in particular through vocational training and retraining.** (additions to Rome text highlighted in bold)

### **Article 125 (Treaty of Rome)**

1. On application by a Member State the Fund shall, within the framework of the rules provided for in Article 127, meet 50% of the expenditure incurred after the entry into force of this Treaty by the State or by a body governed by public law for the purpose of:

(a) ensuring productive re-employment of workers by means of:

- vocational retraining;
- resettlement allowances

### **Article 125 (amended Maastricht); renumbered Article 148 Amsterdam and Nice**

The Council, acting in accordance with the procedure referred to in Article 251 and after consulting the Economic and Social Committee and the Committee of the Regions, shall adopt implementing decisions relating to the European Social Fund. [no reference to vocational training]

### **Article 128 Treaty of Rome – replaced by new Articles 126 and 127 Maastricht; renumbered Article 149 and 150 Amsterdam**

The Council shall, acting on a proposal from the Commission and after consulting the Economic and Social Committee, lay down general principles for implementing a common vocational training policy capable of contributing to the harmonious development both of the national economies and of the common market.

## **Chapter 3: Education, Vocational Training and Youth**

### **Article 126 Maastricht; renumbered Article 149 Amsterdam and Nice**

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 organisation of education systems and their cultural and linguistic diversity.

2. Community action shall be aimed at:

- developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States;

- encouraging mobility of students and teachers, inter alia by encouraging the academic recognition of diplomas and periods of study;
  - promoting cooperation between educational establishments;
  - developing exchanges of information and experience on issues common to the education systems of Member States;
  - encouraging the development of youth exchanges and of exchanges of socio-educational instructors;
  - encouraging the development of distance education.
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.
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 (**Article 189b in Maastricht**), 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

**Article 127 Maastricht; renumbered Article 150 Amsterdam and Nice**

1. The Community shall implement a vocational training policy which shall support and supplement the action of the Members States, while fully respecting the responsibility of the Member States for the Content and organisation of vocational training.
2. The Community action shall aim to:
  - Facilitate adaptation to industrial changes, in particular through vocational training and retraining;
  - Improve initial and continuing vocational training in order to facilitate vocational integration and reintegration into the labour market;
  - Facilitate access to vocational training and encourage mobility of instructors and trainees and particularly young people;
  - Stimulate cooperation on training between educational or training establishments and firms;
  - Develop exchanges of information and experience on issues common to the training systems of the Member States.
3. The Community and the Member States shall foster cooperation with third countries and the competent international organisations in the sphere of vocational training.
4. The Council, acting in accordance with the procedure referred to in Article 251 (**Article 189c in Maastricht**) and after consulting the Economic and Social Committee and the Committee of the Regions, shall adopt measures to contribute to the achievement of the objectives referred to in this Article, excluding any harmonisation of the laws and regulations of the Member States.

**Draft Treaty Establishing a Constitution for Europe – under discussion**

Proposed articles relating to education and training:

**Article II-4: Right to Education**

1. Everyone has the right to education and to have access to vocational and continuing training.
2. This right includes the right to receive free compulsory education.
3. The freedom to found educational establishments with due respect for democratic principles and the right of parents to ensure the education and teaching of their children in conformity with their religious, philosophical and pedagogical convictions shall be

respected, in accordance with the national laws governing the exercise of such freedom and right.

#### SECTION 4: Education, vocational training, youth and sport

##### Article III-182 (formerly Article 149)

1. The **Union** shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and **complementing** their action. It shall fully respect the responsibility of the Member States for the content of teaching and the organisation of education systems and their cultural and linguistic diversity.

The Union shall contribute to the promotion of European sporting issues, given the social and educational function of sport.

2. Union action shall be aimed at:

- (a) developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States;
- (b) encouraging mobility of students and teachers, inter alia by encouraging the academic recognition of diplomas and periods of study;
- (c) promoting cooperation between educational establishments;
- (d) developing exchanges of information and experience on issues common to the education systems of the Member States;
- (e) encouraging the development of youth exchanges and of exchanges of socio-educational instructors **and encouraging the participation of young people in democratic life in Europe;**
- (f) encouraging the development of distance education;
- (g) **developing the European dimension in sport, by promoting fairness in competitions and cooperation between sporting bodies and by protecting the physical and moral integrity of sportsmen and sportswomen, especially young sportsmen and sportswomen.**

3. The **Union** 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.

4. In order to contribute to the achievement of the objectives referred to in this Article,

(a) European laws or framework laws shall establish incentive actions, excluding any harmonisation of the laws and regulations of the Member States. They shall be adopted after consultation of the Committee of the Regions and the Economic and Social Committee.

(b) the Council of Ministers, on a proposal from the Commission shall adopt recommendations.

##### Article III-183 (formerly Article 150)

1. The **Union** shall implement a vocational training policy which shall support and **complement** the action of the Member States, while fully respecting the responsibility of the Member States for the content and organisation of vocational training.

2. **Union** action shall aim to:

- (a) facilitate adaptation to industrial change, in particular through vocational training and retraining;
- (b) improve initial and continuing vocational training in order to facilitate vocational integration and reintegration into the labour market;
- (c) facilitate access to vocational training and encourage mobility of instructors and trainees and particularly young people;
- (d) stimulate cooperation on training between educational or training establishments and firms;
- (e) develop exchanges of information and experience on issues common to the training systems of the Member States.

3. The Union and the Member States shall foster cooperation with third countries and the competent international organisations in the sphere of vocational training.

4. European laws or framework laws shall contribute to the achievement of the objectives referred to in this Article, excluding any harmonisation of the laws and regulations of the Member States. They shall be adopted after consultation of the Committee of the Regions and the Economic and Social Committee.



## **Appendix 2: List of Interviewees**

1. Joergen Bang (President, EADTU & COIMBRA) 19th May 2004, telephone.
2. Ulrich Battis, (former President EADTU) 3rd March 2004, email.
3. Ricardo Charters d'Azevedo (Task Force Human Resources) 4th September 2003, email.
4. Richard Corbett (MEP) 1<sup>st</sup> March 2004, email.
5. Chris Curran (former Director, Oscail) 30th March 2004, Dublin.
6. Coen de Vocht (EADTU & Commission) 29th September 2003 & 1st April 2004, Heerlen.
7. Proinsias de Rossa (MEP) 3rd July 2004, Dublin.
8. Jim Devine (former Oscail staff member; project coordinator; member of SATURN) 19th March 2004, Dun Laoghaire.
9. Claudio Dondi (SCIENTER) 12th May 2004, telephone.
10. Peter Floor (ODL Liaison Group) 23<sup>rd</sup> April 2004, email.
11. Michael Foley (EUROSTEP, now World Bank) 27<sup>th</sup> April 2004, telephone.
12. Seamus Fox (Oscail) various dates, Dublin.
13. Maruja Gutierrez (Head of Multimedia Unit, DGEAC) 17 May 2004, Dublin.
14. Sean Harkin (International Section, Department of Education and Science) 12th May 2004; Dublin.
15. John Hayden (former Secretary HEA) 29th April 2004, Dublin.
16. Piet Hendrykx (Secretary General EADTU) 2<sup>nd</sup> April 2004, Heerlen.
17. Corinne Hermant (Multimedia Unit for Education, Training and Culture DGEAC) 22nd February 2001; 23rd September 2003, Brussels.
18. Brian Holmes (Principal Administrator, Multimedia Unit for Education, Training and Culture DGEAC) 1<sup>st</sup> April 2004, Brussels.
19. Elisa Mancinelli (SCIENTER) 25th September 2003, Bologna.
20. Glyn Martin (former President of Saturn) 26th September 2003, Geneva.
21. Henry McLoughlin, (DELTA project & UCD) 29<sup>th</sup> April 2004, email.
22. Fred Nickolmann (EADTU & EADTU) 19th May 2004, email.
23. Thomas Niklasson (DGEAC, Lifelong Learning) 22nd February 2001, Brussels.
24. Judite Nozes (SATURN) 17th May 2004, Dublin.
25. Sally Reynolds (EADTU/Eurostep) 2<sup>nd</sup> April 2004, Rosbeek, Leuven
26. Chris van Seventer (former Secretary General EADTU) 1<sup>st</sup> April 2004, Heerlen.

### **Appendix 3: Perceptions of ICT in European Education Questionnaire**

Quesno:

## Perceptions of ICT in European Education Questionnaire 2002

Dear Student

In recent years developments in information and communications technologies (ICTs) have presented the possibility of transforming the way we teach and learn. The term eLearning now covers a range of technologies in education, based on the use of personal computers, the Internet and the World Wide Web. The PICTURE project (funded by the European Union) aims to investigate the views of students in Denmark, Ireland, and the United Kingdom on the role of ICTs in education. We hope you will take a few minutes to complete this questionnaire as your views will help us to shape the use of ICT in education. Please be assured that any information you provide will be confidential and all data will be presented in aggregate form. Personal details are requested purely for comparative purposes.

Kay MacKeogh

Project Coordinator

Oscail – National Distance Education Centre, Dublin City University, Dublin 9, Ireland

### Section 1: Access to Technologies

Please indicate whether you have access to the following technologies *(please tick ✓ the relevant statement)*

	At home <i>and</i> work	At home <i>only</i>	At work <i>only</i>	University <i>only</i>	Home <i>and</i> University	Other location <i>only</i>	No access	Don't know
1. Mobile phone	1	2	3	4	5	6	7	8
2. Desktop Computer	1	2	3	4	5	6	7	8
3. Laptop computer	1	2	3	4	5	6	7	8
4. CD-ROM drive	1	2	3	4	5	6	7	8
5. Internet connection	1	2	3	4	5	6	7	8
6. Modem	1	2	3	4	5	6	7	8
7. FAX	1	2	3	4	5	6	7	8
8. Digital TV	1	2	3	4	5	6	7	8
9. ISDN line	1	2	3	4	5	6	7	8
10. DVD player	1	2	3	4	5	6	7	8

11. If you are in paid employment, to what extent would your employer allow you to use workbased computers for study purposes? *(Please tick ✓ the relevant statement)*

Not at all      Outside work hours      During work hours      During and after      Not applicable (not employed, no  
[ 1 ]                      only                      only                      work hours                      facilities in workplace)  
[ 2 ]                      [ 3 ]                      [ 4 ]                      [ 5 ]

12. Which of the following statements reflects the level of access you have to a personal computer in your home *(please tick ✓ the relevant statement)*

1	There is no personal computer in my home
2	I own a personal computer which I do not share with any one else in the household
3	I share a personal computer with others in the household, but I have no problems in using it when I need to
4	I have difficulty in gaining access to the computer because the children monopolise it.
5	I have difficulty in gaining access to the computer because my partner and/or other adults in the household monopolise it.
6	I have difficulty in gaining access to the computer because my children/partner and/or other adults in the household monopolise it.

Please indicate below the types of use you have made of the Internet in the last three months *(please tick ✓ the relevant statement)*

	Never	Daily	Weekly	Monthly
13. Email to fellow students/tutors	0	1	2	3
14. Accessing educational material	0	1	2	3
15. Preparing assignments	0	1	2	3

	Never	Daily	Weekly	Monthly
16. Video conferencing	0	1	2	3
17. Preparing for travel/holiday	0	1	2	3
18. Other (please specify)	0	1	2	3

Where have you accessed the Internet in the last three months? *(Please tick all options which apply)*

	Never	Daily	Weekly	Monthly
19. Home	0	1	2	3
20. Friend's/relation's home	0	1	2	3
21. Office/workplace	0	1	2	3
22. University/college	0	1	2	3
23. School	0	1	2	3
24. Cybercafe	0	1	2	3
25. Public library	0	1	2	3
26. Other public internet access point (e.g. public telephone kiosk)	0	1	2	3
27. Nowhere	0	1	2	3

28. If your course required you to purchase a personal computer, what is the maximum price you would be prepared to pay? *(Please tick ✓ the appropriate response)*

Nothing – I could not afford to pay [ 1 ]	Nothing – I would not want to take a course which required a computer [ 2 ]	Less than €500 [ 3 ]	€501-1000 [ 4 ]	€1001-1500 [ 5 ]	€1501-2000 [ 6 ]	€2000+ [ 7 ]
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29. If your course required you to have access to the Internet from home, what is the maximum monthly sum you would be prepared to pay in charges to the Internet provider?

Nothing – I could not afford to pay [ 1 ]	Nothing – I would not want to take a course which required internet access [ 2 ]	Less than €10 [ 3 ]	€11-30 [ 4 ]	€31-60 [ 5 ]	€61-90 [ 6 ]	€91+ [ 7 ]
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30. If access to personal computers and Internet are compulsory in educational courses, who do you think should cover the cost? *(please tick ✓ the appropriate response)*

Educational institutions [ 1 ]	The European Union [ 2 ]	The Government [ 3 ]	Students [ 4 ]	Other (specify) [ 5 ]	No opinion [ 6 ]
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## Section 2: Expertise in ICTs

What is your level of expertise in the following technologies *(please tick ✓ the appropriate response)*

	I can do this by myself	I would need help to do this	I have never done this type of task
31. Word processor e.g. type up a well formatted essay, using tables, and figures	1	2	3
32. Spreadsheets (enter data, sort, filter, calculate etc)	1	2	3
33. Email (send messages, attach files)	1	2	3
34. Presentation manager (e.g. create a short talk with slides)	1	2	3
35. Internet browser (e.g. use Netscape or Internet explorer to look up a specific website)	1	2	3
36. Bibliographic database (use an online database to search for a specific publication)	1	2	3
37. Computer conferencing (e.g. interact with other students and tutors in an online conference)	1	2	3

Please indicate how often, if ever, you have used or been involved in one of the following *(please tick ✓ the appropriate response)*

	Several times	Once	Never	Never heard of this
38. A course with a website with interactive features, such as assessment, online tasks or learning materials	1	2	3	4

	Several times	Once	Never	Never heard of this
39. An online discussion forum	1	2	3	4
40. Video conferencing	1	2	3	4
41. Virtual learning environment such as WebCT, Blackboard or Pageout	1	2	3	4
42. Academic support and advice from a teacher by email	1	2	3	4

### Section 3: ICTs in Education

Please read the following list of statements and indicate the extent to which you agree or disagree with the statements. (Please tick ✓ the relevant code)

	Totally agree	Mostly agree	Mostly Disagree	Totally disagree	No opinion
43. I prefer to learn on my own	1	2	3	4	5
44. I would generally feel ok trying something new on a computer	1	2	3	4	5
45. ICTs in education will exclude students who cannot afford the technology	1	2	3	4	5
46. I prefer reading from a printed text	1	2	3	4	5
47. I feel threatened by the thought of having to use a computer	1	2	3	4	5
48. I avoid using computers whenever I can	1	2	3	4	5
49. Good access to a tutor requires face to face contact	1	2	3	4	5
50. Course information should be available on the web	1	2	3	4	5
51. Computer based teaching/learning is lacking in 'human interaction' since there is no face to face contact	1	2	3	4	5
52. Computer based conferencing would help learning	1	2	3	4	5
53. Computer access to libraries is preferable to personal visits	1	2	3	4	5
54. Access to the internet is essential for the modern learner	1	2	3	4	5
55. We should use ICT in education because we live in the Information Society	1	2	3	4	5
56. Time spent learning on the computer is time well spent	1	2	3	4	5
57. Learning with ICT requires highly developed study skills	1	2	3	4	5
58. If studying with a computer turned out to be too complex, I would like to return to traditional education methods	1	2	3	4	5
59. I feel fairly confident when working with computers	1	2	3	4	5
60. I like to learn in teams or small groups	1	2	3	4	5
61. I think that ICTs can improve my learning	1	2	3	4	5
62. I would like to know more about computers	1	2	3	4	5
63. I'm often unsure what to do when using a computer	1	2	3	4	5
64. ICTs in education will help to develop a European workforce qualified to compete against global competition	1	2	3	4	5
65. In general learning with ICT is very time consuming	1	2	3	4	5
66. Quality information is hard to find on the web (WWW)	1	2	3	4	5
67. All students should learn something about computers as part of their course	1	2	3	4	5

	Totally agree	Mostly agree	Mostly Disagree	Totally disagree	No opinion
68. Computer based learning is the way of the future	1	2	3	4	5
69. I think that in online courses, small-group learning may become disorganised	1	2	3	4	5
70. I prefer to study with traditional education methods	1	2	3	4	5
71. I do not understand how people can enjoy working with computers	1	2	3	4	5
72. I am generally quite good with computers	1	2	3	4	5
73. Courses should be presented on CD-ROMs	1	2	3	4	5
74. Computers can bring distance education students together	1	2	3	4	5
75. Computers reduce the quality of the learning experience	1	2	3	4	5
76. Computer based materials are more likely to be up to date	1	2	3	4	5
77. Anyone can develop the skills needed to use new technology	1	2	3	4	5
78. The web allows information to be made available at just the right time	1	2	3	4	5
79. Investing in ICTs in education is a waste of money	1	2	3	4	5
80. If I could afford to I would buy a home computer	1	2	3	4	5
81. ICT allows for effective sharing of experiences	1	2	3	4	5
82. I would like to cooperate on learning tasks with people from different countries	1	2	3	4	5

The following is a list of opportunities that might be enhanced by ICTs. Please indicate how important you think each of them is (please tick ✓ the relevant responses).

	Very important	Important	Not very important	No importance at all	No opinion
83. Enabling European students to take courses and modules via the internet from higher education institutions in their own and other countries is	1	2	3	4	5
84. Enabling students to collaborate on academic work with other students in their own and other countries is	1	2	3	4	5
85. Enabling students from less-favoured social backgrounds to access higher education more easily is	1	2	3	4	5
86. Enabling students from remote geographical regions to access higher education more easily is	1	2	3	4	5
87. Developing employability skills such as teamwork, problem-solving, self-learning capability, presentation skills etc. is	1	2	3	4	5
88. Developing a more autonomous and learner centred approach in university teaching is	1	2	3	4	5
89. Developing a more collaborative and less individual approach to learning is	1	2	3	4	5
90. Widening the range of sources of information and knowledge available to students is	1	2	3	4	5
91. Providing more effective and/or frequent feedback to students on their learning progress is	1	2	3	4	5

Given the choice, which of the following study methods would you prefer? (Rank 1 to 8):

Rank	Mode
	92. On campus, full-time, face to face lectures and tutorials
	93. On campus, full-time, face to face lectures and tutorials plus online support including websites, online access to library databases
	94. On campus, part-time, face to face lectures/tutorials/labs
	95. On campus, part-time, face to face lectures/tutorials/labs plus online support including websites, online access to



	library databases
	96. Distance education, written course materials, with occasional face to face tutorials
	97. Distance education, mix of written course materials, online support, face to face tutorials
	98. ELearning, mix of written course materials, online materials, online tutorials
	99. Other (please specify)

#### Section 4: The European Union

How would you rate your knowledge of the European Union, on a scale of 1 to 10 where 1 means you know nothing at all and 10 means you know a great deal about the European Union? *(Please circle the relevant number)*

100. I know nothing about the EU 

1	2	3	4	5	6	7	8	9	10
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 I know a great deal about the EU

101. To what extent do you feel attached to Europe? *(Please tick ✓ the relevant code)*

Very attached [ 1 ]      Fairly attached [ 2 ]      Not very attached [ 3 ]      Not at all attached [ 4 ]      No opinion [ 0 ]

102. Do you think membership of the EU is a good thing, a bad thing, or neither *(please tick ✓ the relevant code)*

A good thing [ 1 ]      Neither good nor bad [ 2 ]      A bad thing [ 3 ]      No opinion [ 0 ]

103. Has [your country] benefited from membership of the EU? *(please tick ✓ the relevant code)*

Yes [ 1 ]      No [ 2 ]      Don't know [ 3 ]

104. In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? *(please tick ✓ the relevant code)*

Very positive [ 1 ]      Fairly positive [ 2 ]      Neutral [ 3 ]      Fairly Negative [ 4 ]      Very negative [ 5 ]

105. To what extent are you in favour of or against efforts to unify Europe? *(please tick ✓ the relevant code)*

Very much for [ 1 ]      For to some extent [ 2 ]      Against to some extent [ 3 ]      Very much against [ 4 ]      No opinion [ 0 ]

106. Are you in favour of or against extending the membership of the EU to additional countries? *(please tick ✓ the relevant code)*

Very much for [ 1 ]      For to some extent [ 2 ]      Against to some extent [ 3 ]      Very much against [ 4 ]      No opinion [ 0 ]

107. How many Members of the European Parliament (MEPs) represent [your country] *(please tick ✓ the relevant code)*

Don't know [ 1 ]      10 [ 2 ]      15 [ 3 ]      20 [ 4 ]      Other number (specify) [ 5 ]

108. How is the European parliament established? *(please tick ✓ the relevant code)*

Appointed by national governments [ 1 ]      Selected by the European Commission [ 2 ]      Elected directly by citizens of each country [ 3 ]      Not sure/don't know [ 4 ]

109. Can you name your local MEP?

Local MEP is: \_\_\_\_\_ I don't know the name: [ 2 ]

110. Have you ever voted in a European election? *(please tick ✓ the relevant code)*

All elections [ 1 ]      Some elections [ 2 ]      Never voted [ 3 ]      Not eligible to vote [ 4 ]

111. Have you ever visited other countries in the European Union? *(please tick ✓ the relevant code)*

Never visited [ 1 ]      Visited 1 [ 2 ]      Visited 2-5 [ 3 ]      Visited 6-10 [ 4 ]      Visited 11-15 [ 5 ]

For what purpose did you visit other European Union countries? (please tick ✓ all, which apply)

	Several times per year	Once per year	Once every few years	Once only	Never
112. Holiday	1	2	3	4	5
113. Work	1	2	3	4	5
115. Study	1	2	3	4	5
116. Erasmus exchange	1	2	3	4	5
117. Study visit funded by EU	1	2	3	4	5
118. Other	1	2	3	4	5

119. To what extent are you in favour of or against a common currency in Europe (please tick ✓ the relevant code)

Very favourable [ 1 ]      Favourable [ 2 ]      Not favourable [ 3 ]      Not at all favourable [ 4 ]      No opinion [ 0 ]

120. In your opinion, at what level should education policy be decided? (please tick ✓ the relevant code)

EU level only [ 1 ]      National level only [ 2 ]      Both EU and National [ 3 ]      No opinion [ 4 ]

121. To what extent would you favour the EU taking a role in making the education systems in the Member States more alike (e.g. common degree structures, common curricula etc) (please tick ✓ the relevant code)

Very favourable [ 1 ]      Favourable [ 2 ]      Not favourable [ 3 ]      Not at all favourable [ 4 ]      No opinion [ 0 ]

The EU is promoting the increased use of eLearning approaches in all levels of education (where eLearning means the use of internet and computer technologies to deliver education). Please indicate below your response to EU involvement in this area. (please tick ✓ the relevant code)

	Strongly agree	Agree	Disagree	Strongly disagree	No opinion
122. The EU should try to influence institutions about how they teach their courses	1	2	3	4	0
123. Decisions on introducing ICTs in education should be made at EU level	1	2	3	4	0
124. The EU should restrict its involvement to policies for training for jobs and employment	1	2	3	4	0
125. EU support for eLearning could result in an improvement in education and training in the Member States	1	2	3	4	0
126. Only the Member States should decide policies on eLearning in their education and training institutions	1	2	3	4	0
127. A common EU approach to ICTs in education could lead to a loss of national culture and identity	1	2	3	4	0

Should the EU have a role in deciding policy in the following areas (please write Y (yes) or N (no) or ? (don't know/no opinion) in the relevant box)

	School level	Higher Education	Vocational Education & Training	Adult education Lifelong learning	No opinion
128. Curriculum					
129. Recognition of qualifications					
130. Funding					
131. Teaching methods					
132. Student mobility between countries					

### Section 5: Personal Information

133. Gender (please tick ✓ appropriate code)

Male [ 1 ]

Female [ 2 ]

134. Age group (please tick ✓ appropriate code)

> 20 yrs [ 1 ]

21-30 [ 2 ]

31-40 [ 3 ]

41-50 [ 4 ]

51-60 [ 5 ]

60+ [ 6 ]

135. Marital status (please tick ✓ appropriate code)

Single [ 1 ]

Cohabiting [ 2 ]

Married [ 3 ]

Divorced [ 4 ]

Other [ 5 ]

136. Economic status

Student full-time

Employed part-time

Employed full-time

Working in the home

Retired

Unemployed

Other

(please tick ✓ appropriate code)

[ 1 ]

[ 2 ]

[ 3 ]

[ 4 ]

[ 5 ]

[ 6 ]

[ 7 ]

137. If you are working in paid employment outside the home, at what level do you work? (please tick ✓ appropriate code)

Supervisory  
[ 1 ]

Junior Management  
[ 2 ]

Middle Management  
[ 3 ]

Senior Management  
[ 4 ]

Professional  
[ 5 ]

Other  
[ 6 ]

Not applicable  
[ 0 ]

138. Location of main residence:  
(please tick ✓ appropriate code)

A rural area [ 1 ]

An urban area [ 2 ]

A metropolitan area (pop. over 1 million) [ 3 ]

139. Distance of main residence from campus  
(please tick ✓ appropriate code)

>5mls/  
>8kms

6-10mls/  
9-16kms

11-15mls/  
17-24kms

16-20mls/  
25-32kms

21-50mls/  
33-80kms

51-100mls/  
81-160kms

100mls+/  
160kms+

[ 1 ]

[ 2 ]

[ 3 ]

[ 4 ]

[ 5 ]

[ 6 ]

[ 7 ]

140. Previous highest level of education (please tick ✓ appropriate code)

Incomplete  
second level  
[ 1 ]

Completed  
second level  
[ 2 ]

Undergraduate  
certificate/diploma  
[ 3 ]

Bachelor's  
degree  
[ 4 ]

Postgraduate  
degree  
[ 5 ]

Professional qualification  
(e.g. nursing etc)  
[ 6 ]

Other  
(please specify)  
[ 7 ]

141. Programme on which you are registered in 2002 (please tick ✓ appropriate code)

BA	BScIT	BNS	MITA	MOPS	MSIS
[ 1 ]	[ 2 ]	[ 3 ]	[ 4 ]	[ 5 ]	[ 6 ]

142. Please indicate your primary motive for studying this programme (please tick ✓ appropriate code)

Personal interest	To prepare for career	To change current career	To upgrade qualifications	Other
[ 1 ]	[ 2 ]	[ 3 ]	[ 4 ]	[ 5 ]

Would you be willing to be interviewed by telephone as part of this study? Yes [ ] No [ ]

If yes, please print your name, telephone number (including STD dialling code), and email below:

Name: \_\_\_\_\_ Contact telephone: \_\_\_\_\_

Email \_\_\_\_\_ @ \_\_\_\_\_ (please print legibly)

Finally, have you any comments on the role of technology in education? Please use extra pages if required.

**Thank you for your cooperation.**

Please return the form **as soon as possible**, using the reply paid envelope to Kay Mac Keogh, Oscail, DCU, Dublin City University, Dublin 9, Ireland. If you prefer, a word version of the questionnaire can be emailed to you on request for completion online. If you wish to receive an email version, please send a message to

[kay.mackeogh@dcu.ie](mailto:kay.mackeogh@dcu.ie).