



## European-wide e-Learning Recognition Review Report

### -----EXECUTIVE SUMMARY-----

#### ***SMEs & e-LEARNING (SMEELEARN) PROJECT***

ERASMUS+ KA2 [2014-1-UK01-KA202-001610]

<http://www.sme-elearning.net>

**September 2015**

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## **European-wide e-Learning Recognition Review Report – Summary & Conclusion**

The aim of the Review Report is to study the conditions under which SME employees will be more likely to accept and use technology-based learning and make general recommendations as to what strategies SMEs need to adopt to gain the acceptance of their employees.

This European-wide e-Learning Recognition Review Report has been produced in association with all Project Partners who have fully contributed to its production. The first stage of the Report preparation was to prepare a Methodological Plan and then set about Data Gathering in order to inform the production of this Report.

The Methodological Plan set out how the Review was to be undertaken and the methodology for the data gathering which comprised two major elements:

- a European Literature Review, which included a series of Country Reports prepared by Partners and cover the UK, Spain, Italy, Slovakia and Greece (copies of each Country Report can be found at Appendices B to F); and
- A five Country survey was carried out from 1st May 2015 to 30th June 2015 in five European countries: United Kingdom, Spain, Italy, Slovakia and Greece using a mixture of questionnaires, focus groups, face-to-face and telephone interviews – copies of the field study questionnaires can be found at Appendix A.

For the project as a whole over 7,000 translated electronic questionnaires were sent to SMEs belonging to various business sectors randomly selected from national databases which provide contact details and financial information for registered companies.

E-learning is considered as one of the global driving factors for the development of education and economy in many countries. The recent developments of e-learning methodologies characterised by the diffusion of MOOCs, Open Educational Contents, cloud based tools and other elements have improved the effectiveness of the courses and reduced costs. However, there are still a number of issues that restrict the use of e-learning throughout Europe.

Anecdotal evidence suggests that there is a significant correlation between the level of IT infrastructures of a country and the adoption of technology-enabled educational tools such as e-learning by institutions or corporations in this country. Compared to the EU average, in more developed economies (UK) there are higher levels of Internet access whereas in less developed economies lower.

The European and Country literature review and questionnaire/survey highlighted a number of issues:

*The following important issues were highlighted after reviewing all responses from the five Countries (although there are differences in the different Countries).*

Throughout Europe our survey highlighted that the top three perceived important advantages of e-learning were (i) greater satisfaction in the learning, (ii) job related and (iii) multiple choice - with the least advantageous being "time flexibility" with the top three perceived important disadvantages of e-learning were (i) need for facilities nearby, (ii) course selection difficulty and (iii) need for skills.

As regards e-learning delivery methods around a quarter of respondents wished to undertake courses solely via the Internet, with an around third wanting Internet course assisted by face-to-face support.

The good news from the survey results was that over 65% of respondents felt that the training they received through e-learning would help them perform their job better.

However, SME owner/managers responders had little or no knowledge of the uses of e-learning, so there is work to do to promote the use of e-learning. The overwhelming method preferred by responders was through sharing best practice. This is borne out by the responders to our "Training Provider" questionnaire where only 21% were SME customers.

The e-learning market in **Greece** is rather underdeveloped. The deep economic crisis and the current situation in Greece could partly justify this fact. Despite this however, a set of actions need also to be undertaken. This set of actions should correspond to increased sophistication and adopt an inter-governance perspective, in order to build and effectively implement highly demanding education and training policy reforms, and to deliver both on a short-term and a long-term basis. Such an approach will allow these reforms to bring results, as it regards the learning outputs, in the next three-year period, with measurable up-skilling of human resources, through focused and advanced actions. An example of actions in line with this proposal includes the development of various models for the design of web-based electronic train systems (ETS) for Greek SMEs.

**Slovak** SMEs recognize that in order to increase their competitiveness and achieve more growth the education is an indispensable precondition. They are also fully aware that in terms of time efficiency, cost savings and overall flexibility, e-learning is the ideal choice compared to full-time form of education. However, when comparing the three main types of education (traditional – presence based, combined, e-learning), combined form continues to gain the best score among employees. In addition to frequently stated fear of losing personal contact between trainers and participants of the course, the lack of motivation or lack of information on the use of the system are other perceived disadvantages of e-learning.

This awareness is emerging also in **Italy**, although there is still a long way to go before a systemic implementation of the use of e-learning is reached. For instance e-learning is used mainly in large enterprises. In SMEs, at the moment, the implementation of e-learning systems is very slow and doesn't meet the expectations and/or needs of the users. The e-learning sector in Italy has a great growth potential but the current situation cannot be compared to other countries (USA, Northern Europe, Asia etc.). This is due to several factors among which there is definitely the lack of powerful infrastructures.

The slow diffusion of the broadband has a negative impact on e-learning implementation. For instance in **Italy** 22.000.000 of people don't have access to 20Mbps band. In 2014 64% of the Italian families have an internet access but there are still 21.9 million people that don't use internet. Among these people, elderly, children (1-6 years), Southern Italy and the islands. In these conditions, it is not surprising that the e-learning market in Italy is not comparable to the one of the developed countries and the teaching programmes are limited and technologically outdated.

Although e-learning has seen a huge increase in recent years, **Spain** remains below in terms of adoption of e-learning as an effective educational option, compared to the EU or the United States. Several studies found that there is no direct relationship between Internet penetration in the country and the demand for online training. In 2013 the penetration of e-learning accounted for 18% in Spain, above Portugal, Austria and Sweden, but clearly below other EU Member States.

The need to economise and to encourage growth in the **UK** suggests that e-learning can provide a 21<sup>st</sup> century alternative to traditional training packages. The "digital divide" may be interpreted in terms of generational use and although one should not generalise, it is apparent that younger employees of large organisations are more likely to consider e-learning as the preferred means of accessing training and information. Social media, including *Facebook*, *Twitter* and *LinkedIn* are often viewed as the preferred means of communication and SMEs, sole traders and larger organisations are becoming adept at sharing, trading and training via these technological hubs. Within these areas, e-learning and SMEs continue to develop a working relationship although there seems to be a gap between what is predicted, proposed and aimed for and what is happening in practice.

For SMEs generally the most frequent services required are e-learning training courses with tutorials and evaluation services. As the investment required in order to develop personalized platforms and courses is too high for many SMEs (taking into account that any European SMEs have less than 10 employees), the most common solution adopted is the purchase of e-learning courses. The content is standardised and the employees are treated individually, like the other participants on the course.

One of the most widespread problems in relation to distance education is the difficulty of tutoring courses. To do this, some centers are incorporating in their virtual campuses, intelligent tracking systems. These systems simulate real tutors and monitor the students throughout the virtual space in order to give each user the information required according to their knowledge and learning skills.

Although the use of the Internet by individuals throughout the EU has risen from 51% in 2007 to 75% in 2014 those individuals accessing the Internet for on-line training has only risen from 3% in 2007 to 6% in 2014.

Therefore there is a clear need to increase the quality of the e-learning offer.

The fragmentation of the initiatives, the waste of public resources and the lack of a common evaluation system are the main critical factors. There is no communication between e-learning providers and the best practices are not so visible and shared.

E-learning systems in Europe need to have a coherent strategy that foresees the definition of some parameters to plan e-learning courses, common evaluation guidelines and repositories to share good practices and common standards to manage the processes.

***“ ... e-learning has the potential to increase retention of information by up to 60%; nearly 25% of employees leave jobs because there is not enough room for training or development, whilst companies who offer e-learning are able to generate 26% more revenue per employee...” (e-Learning Industry, 2014)***

The publication of the “Best Practice Guide to e-learning for SMEs”, in January 2016, will address, as far as practicable, many of the specific issues raised in this Report to increase the use of e-learning, and its value to SME development and growth, and inform e-learning course developers of the concerns raised by SME employees and employers.

The full version of the European-wide e-Learning Recognition Review Report has been published on the Project website (<http://www.sme-elearning.net>) and is freely available to download to interested individuals and organizations.

## **SMEELEARN Project Summary**

***In order to place this Recognition Review Report in the context of the whole SMEELEARN Project the following section gives a summary of all the elements of the SMEELEARN Project and the importance of this Review Report to the outcomes of the whole Project.***

*This SMEELEARN Project, which has been funded by the European Union through the ERASMUS+ KA2 Programme, has as its aim to test and transfer e-learning practices that are common in the formal education sector to SMEs in order to address the vocational skills needed to develop and sustain SME growth in Europe. This will involve working closely with SMEs employees and managers and VET providers. Research has shown that SMEs have limited resources for offering training and what they really require is “informal” training for specific problems they encounter, at a time to suit them. Bespoke training is not usually on offer from traditional training institutions. Therefore e-learning offers a great opportunity. However, there is reluctance on the part of SMEs, and their employees, to engage in this form of learning, despite the many advantages.*

*The objective of this Project is to ensure, by way of the creation of an “SME e-Learning Portal”, that SMEs are aware of the e-learning opportunities available to them, and, more importantly, how these can be used to best advantage to ensure acceptance by the Managers and workforce. Throughout Europe SMEs are increasingly important to the economic well-being of the EU. It is estimated that they account for 99% of all business with 42% of all turnover.*

*Meeting the training needs of SME employees is a challenge that requires review; their very survival may depend on an appropriately trained workforce. Established to provide real solutions to the challenge of embedding e-learning in the training practices of SMEs, the SMEELEARN consortium seeks to promote the development of strong economies through the identification and use of innovative training systems.*

*The Project outcomes will include establishing a “SME e-Learning Recognition Review Group” to conduct research leading to the production of a “Best Practice Guide to e-learning for SMEs throughout Europe.”*

*This will include: a study of the conditions under which SME employees will be more likely to accept and use technology-based learning; recommendations as to what strategies SMEs need to adopt to gain the acceptance of their employees and the development of a “best practice approach” for SMEs when considering including e-learning as part of their training portfolio.*

*This project will:*

- *develop and promote a “SME e-Learning Portal” to ensure that innovative training practices are shared and made accessible to European SMEs,*

- *create associative opportunities to embed an e-learning culture within participating organisations,*
- *engage the target group in the processes of e-learning by ensuring that training materials are accessible and fit for purpose, and*
- *provide a web based Portal that will feature, promote and emphasise the importance of e-learning and blended learning as innovative, accessible and economically viable alternatives to traditional and often costly training practices.*

*The impact of the Project will be the direct promotion of e-learning as a viable training strategy, through the dissemination of the report and its findings, the transfer and embedding of innovative training practices in SMEs contributing to the sustainability and growth of SMEs within the EU.*

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