



Dr. Lutz P. Michel - Germany

Presentation on the ASEM eLearning Seminar, Session III

Seoul, Oct. 28, 2003

„Market Status and Policy for eLearning in Germany“



Content

- About the speaker
- Trends in professional training & education
- Market status of eLearning in Germany
- eLearning in universities
- Government programs in the field of eLearning
- Trends in eLearning standards
- Challenges and opportunities



About the speaker

- Dr. Lutz P. Michel - managing director of MMB institute
- MMB is a private, independent research and consulting company, located in Essen and Berlin, Germany
- The institute carries out studies in the field of education & training and labour market development
- MMB is specialised on research in the fields of eLearning and knowledge management in SME
- MMB is partner of the European Quality Observatory (EQO) on quality in eLearning and co-founder of the German eLearning Association

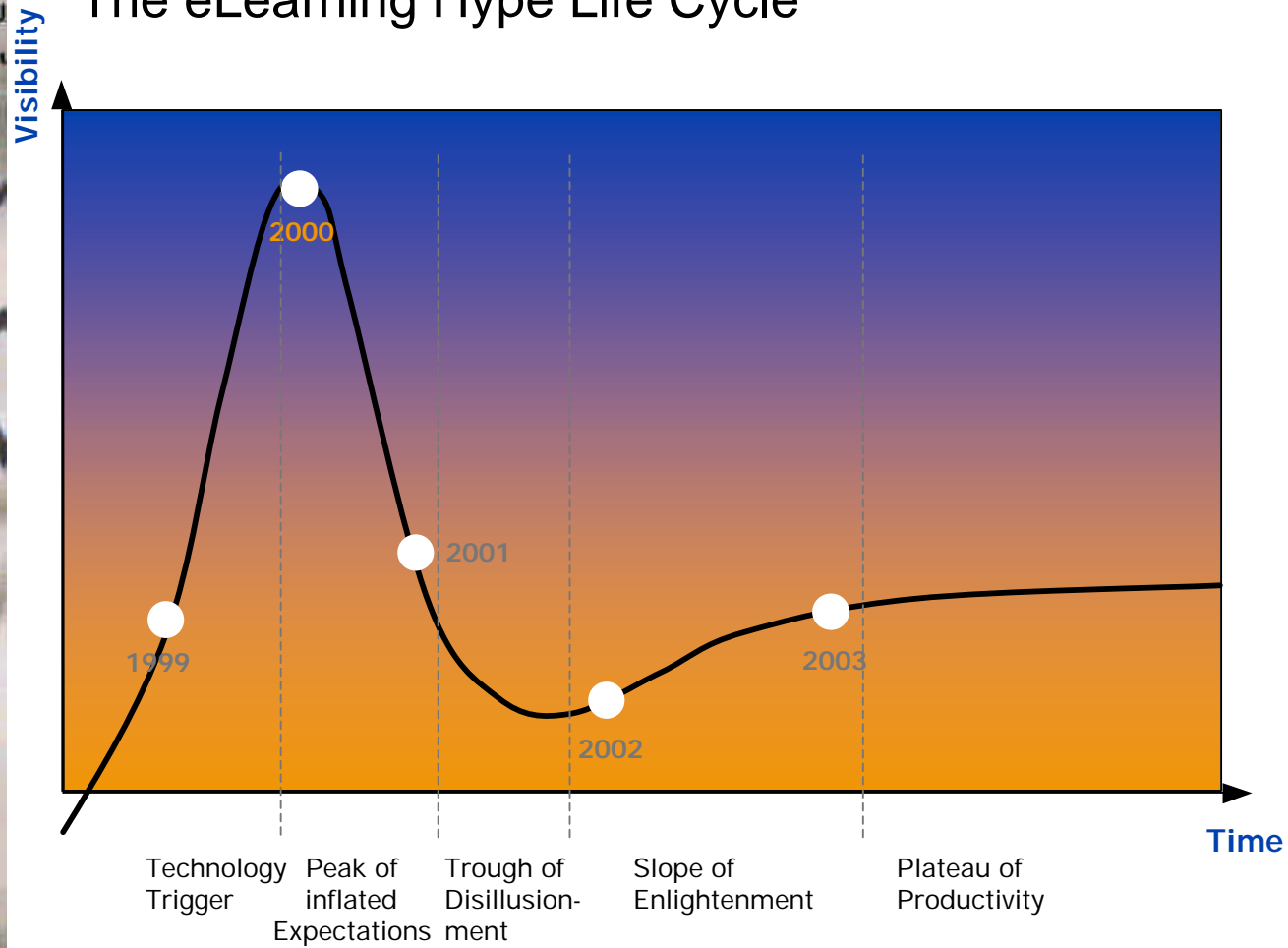


Trends in professional training & education

- Less time and money invested
- Short, modular courses prevail
- Certification of qualifications required
- Informal learning / learning on the job
- Internationalisation in the educational market
- Quantifying eLearning ROI
- „Mega-trend: L³“ (Live-long Learning)

Where are we today?

The eLearning Hype Life Cycle



MMB 2002; after: Hype Life Cycle Model of Gartner Group 2001



Market Status of eLearning in Germany [1]

- 11% of the German population claim to have used eLearning [53,5% have access to the internet]
- 40% say they could imagine to use eLearning in the future
- 24% of medium sized companies (50-1.000 employees) use eLearning
- 46% of big companies (1.000 and more employees) use eLearning
- But: in those big companies only 10% of employees are “eLearners” [32,7 work with a computer]



Market Status of eLearning in Germany [2]

- Highest **use of eLearning** by sector:
insurance (32%), electronics (31%), banking (28%),
and informatics/telecommunication (28%)
[average of the German industry: 15%]
- Highest **training activity** by sector:
banking; insurance; electronics; healthcare; transport
- **eLearning themes** in business training:
IT-standard software (67%), Commercial knowledge
(37%), Languages (37%), Product knowledge (33%)
..... Soft-skills (18%)



eLearning in Universities

- German universities offer about 2.300 eLearning courses
- 55% of all freshman students have eLearning experiences
- How many students use eLearning regularly? Sorry, nobody knows!



Government Programs in the field of eLearning

In the last 5 years several programs to foster the development and use of eLearning have been started, with hundreds of partners involved - from the European to the local level

2 examples:

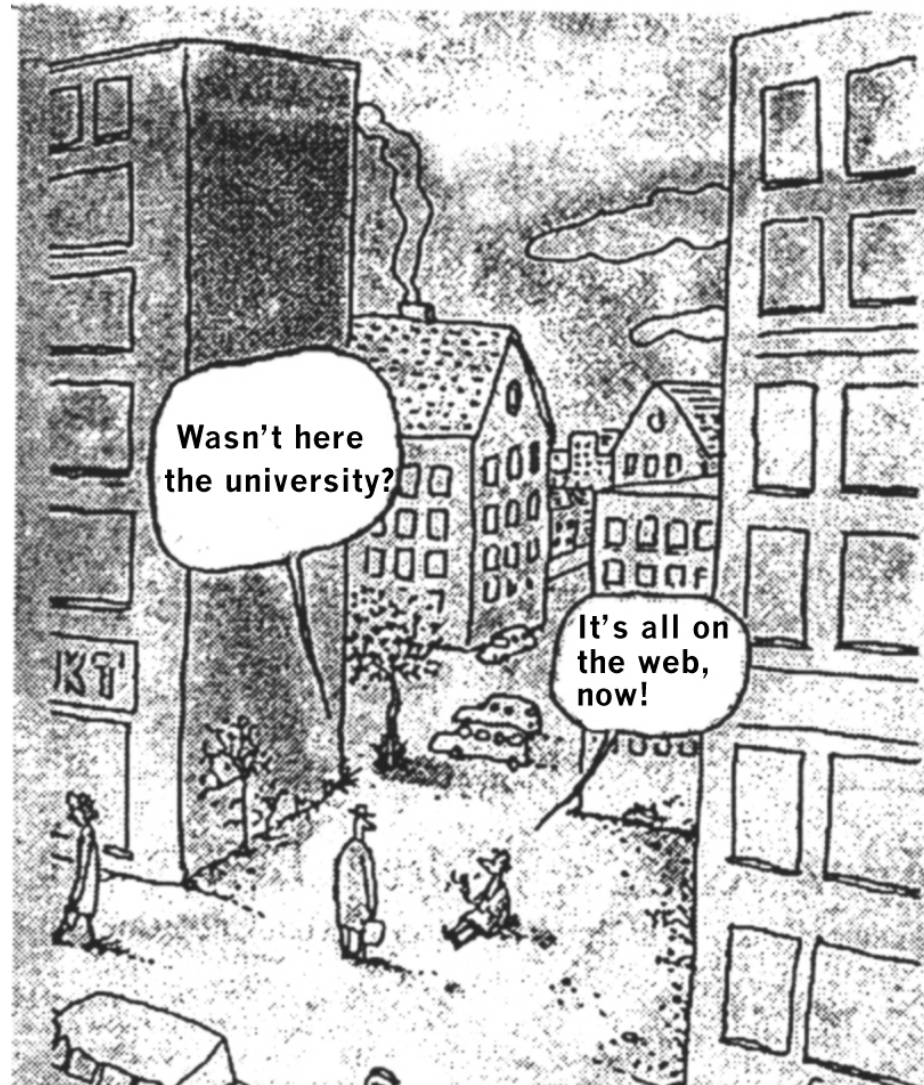
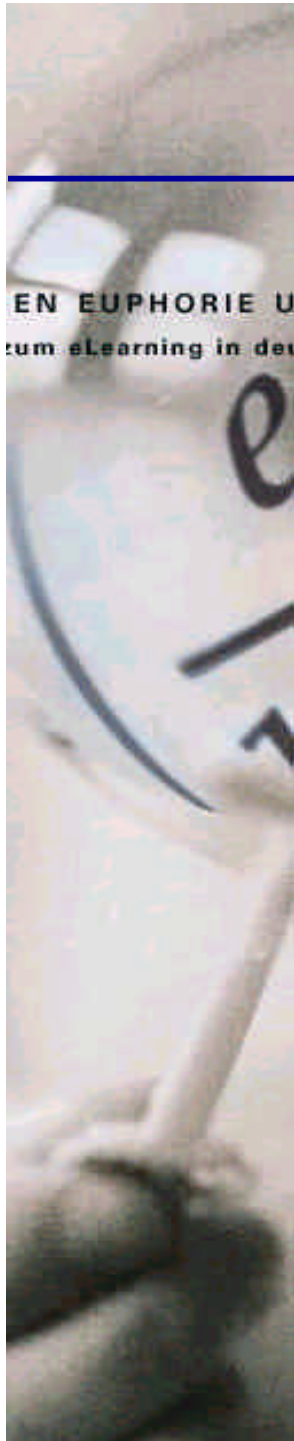
- “New Media in Education”: 100 joint projects in 140 study courses; funding: Euro 150 Mio. by Federal Ministry of Education (<http://www.gmd.de/PT-NMB/>)
- “LERNET - Net Based Learning in SME and Public Administration; funding: Euro 15 Mio. by Federal Ministry of Commerce (<http://www.lernet.info>)



Trends in eLearning Standards

- eLearning norms and standards are only an experts theme
- Integration into Enterprise IT-Systems is of high importance
- Re-usability of learning content can bring down costs for vendors and users
- There is no need for over-all standards (pluralism required)
- Coming up: German eLearning association

eLearning has to change, not to substitute traditional training & education





Challenges and Opportunities

- **eLearning content must meet the user's needs and possibilities**
- **eLearning must be integrated into overall strategies:**
 - ◆ **eUniversity = Campus Innovation**
 - ◆ **eGovernment = Innovative Administration**
 - ◆ **eHR = eLearning as part of eBusiness Strategy**
- **eLearning will not substitute traditional teaching (“blended learning”)**
- **International Co-operation is required**
- **A new learning culture is essential**



„3C“ of successful eLearning

C
CONTENT

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CONTEXT

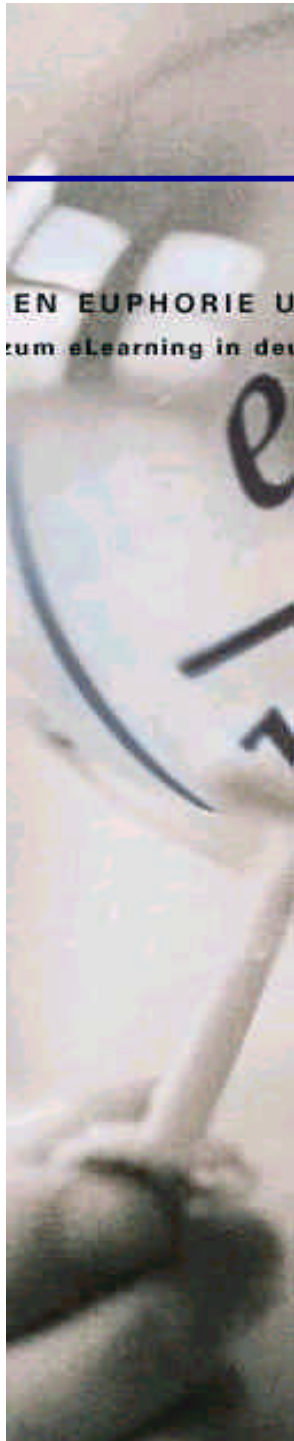
C
CULTURE

...and the relations must fit!

eLearning

or

eLearning?



Thank you very much for your attention

(For further questions: www.mmb-institut.de)



MMB Institute for Media and Competence Research