

Megatrends in e-learning provision Project

Report on Spain, Italy, Portugal, Greece and Malta

REPORT ON SPAIN, ITALY, PORTUGAL, GREECE AND MALTA

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to promote eLearning; however, there are more generic and horizontal plans that indirectly promote eLearning projects.

Following the eLearning initiative launched by the European Union in 2000, the Spanish government has developed a set of policies and initiatives to promote eLearning. The main points of this policy are:

- providing all schools with the equipment and facilities for accessing ICT;
- developing Internet courses and training;
- setting up an observatory and laboratory concerned with the educational applications of ICT, thereby supporting innovation and development in such applications;
- strengthening cooperation between Latin America and Europe in the area of ICT in education.

Moreover, several plans and projects are dedicated to eLearning for vocational purposes. These are supported by the Spanish Government through the European Social Fund, and through FORCEM (Continuing Training Foundation). It is indicative of the situation that 30% of all training plans presented in 2002 were related to eLearning. Moreover, the Ministry of Industry Tourism and Commerce has created FORINTEL, a program to promote the use of ICTs in enterprises, which offers eLearning courses. Currently, the Spanish government has launched the Plan España.es for the period 2004-05. One of the action points of the Plan is the promotion of accessibility to training and digital content.

The listing of Spanish universities is based on a research project undertaken by the Universidad de La Laguna in 2001². This project had the aim to analyze the use of virtual learning environments and content management systems in the universities of Spain. The fact that the results of this study are already 5 years old made it necessary to check every single institution in order to confirm that the data were still correct. In some cases the characteristics of platforms, design, courses and contents had changed considerably. None of the universities listed in the study had given up ICT-supported teaching. Only in the case of the University of Almería the ongoing use of a virtual campus could not be confirmed due to an apparently dead website.

The G-9 group³:

Nine of the listed universities belong to a consortium created in 1997 with the aim to deliver some courses online through a common platform. The main objective of this group, called G-9, is "to promote collaboration between them in terms of teaching and research activities and to stimulate student's virtual mobility."⁴ Currently the consortium is offering 70 courses to all the students of these universities. The enrolment in any of these courses can be done via the computer services of the institution each student belongs to.

² <http://www.edulab.ull.es/campusvirtuales/informe/documentos.htm>
<http://www.edulab.ull.es/campusvirtuales/universidades/mapa.htm>

³ www.uni-g9.net

⁴ SANGRÀ, Albert (2005). "E-Learning in Spain: The Consolidation of the Earliest Take-Off". In: DITTLER, U; KAHLER, H.; KINDT, M.; SCHWARZ, C. (eds.). *E-Learning in Europe – Learning Europe*. Münster: Medien in der Wissenschaft, vol. 35, pages 181-201.

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1.1. Universidad de Málaga

(www.uma.es / www.ieev.uma.es)

The institution offers both e-learning courses aimed to support f2f education and pure online courses.

MOODLE is the software used to generate the virtual learning environments. The university participates in a common project of 10 Andalusian universities that offer a total number of 30 online courses by means of a MOODLE-platform called Campus Andaluz Virtual (www.campusandaluzvirtual.es).

The number of courses offered is too small to consider Universidad de Málaga a mega-provider of e-learning.

1.2. Universidad S.E.K., Segovia

(www.usek.es)

Offers a "campus virtual" with administrative services like information, digital library, virtual classrooms, material as support to f2f classes.

This institution is not a mega-provider of e-learning.

1.3. Universidad Nacional de Educación a Distancia – UNED*

(www.uned.es)

"The UNED is a distance teaching public university created in 1972. [...] From the beginning, UNED had a traditional distance teaching university education model [...] mainly identified by paper based teaching materials supported by different means such as radio and TV broadcasts and video tapes, weekly face to face tutoring sessions in the associated centres spread out over the Spanish territory. [...] The 'Plan de Virtualización de la UNED' was made in 2000. In this plan, it was foreseen to systematically introduce online teaching services for different accredited degrees. The latest data show that 667 courses belonging to 25 different accredited degrees have already been put online."⁵

The institution started to use WebCT. Later it developed an open source platform under the name of aLF⁶.

The UNED has more than 180.000 students and declares itself the university with the largest number of online courses in Spain.

The institution's website does not offer clear figures regarding online courses and enrolments. Although the UNED seems to be a clear mega-provider of e-learning, this assumption still has to be confirmed. Our contact, Miss Julia González Mangada (infouned@adm.uned.es) has forwarded our request to the Vice president of Quality and Educational Innovation. We are waiting for reply.

⁵ SANGRÀ, Albert (2005). "E-Learning in Spain: The Consolidation of the Earliest Take-Off". In: DITTLER, U; KAHLER, H.; KINDT, M.; SCHWARZ, C. (eds.). *E-Learning in Europe – Learning Europe*. Münster: Medien in der Wissenschaft, vol. 35, pages 181-201.

⁶ <http://www.innova.uned.es>

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1.4. Universidad Camilo José Cela

(www.ucjc.edu)

Offers virtual environments as a support-tool for the students.

The UCJC is therefore not a mega-provider of e-learning.

1.5. Universitat de les Illes Balears

(www.uib.es) (<http://campusextens.uib.es>)

Member of the G9 group.

The University of the Balearic Islands uses WebCT for online education. Their virtual campus is called "Campus Extens" which provides over 200 courses and a considerable number of degrees. Nonetheless, the information given about the teaching model applied on this campus indicates that **the UIB cannot be considered a mega-provider of e-learning**: The courses offered on "Campus Extens" have a face to face component of 70% of the total number of learning hours and are therefore not what we could consider "online-courses" under the terms of the Megatrends Project.

The Universitat de les Illes Balears is part of the G9-group. It offers 6 online courses on this shared portal.

1.6. Universidad de Castilla-La Mancha

(www.uclm.es)

Belongs to G9 with a common offer of "asignaturas de libre configuración".

UCLM has 4 courses of a total of 74 within the G9 group⁷.

Offers an e-library, but the main portion of titles is only accessible from computers that belong to the university.

The UCLM is therefore not a mega-provider of e-learning.

1.7. Universidad de la Rioja

(www.unirioja.es) (campusvirtual.unirioja.es)

Takes part in the virtual training program G9.

The virtual learning environment used is WebCT.

Unirioja offers as online courses 2 full degrees that sum a total of 43 online courses or subjects. There are 2 master degrees and 5 specialization courses in the postgraduate program offering a total of 44 courses. In addition to that there are 3 online courses offered under the category "lifelong learning". All together the research on the university's website allowed identifying 90 online courses. There's no information given about number of students and/or enrolments.

The figures indicate that Universidad de la Rioja is not a mega-provider of e-learning.

⁷ www.uni-g9.net

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1.8. Universidad de Oviedo

(www.uniovi.es) (www.aulanet.uniovi.es)

The institution takes part in the G9-project and provides 12 online courses. It recently changed from an own VLE-design to MOODLE.

The number of online courses offered is not large enough to consider UNIOVI a mega-provider of e-learning.

1.9. Universidad de Cantabria

(www.unican.es)

UNICAN participates in the G9-project and offers 8 online courses within the common G9 program.

It uses WebCT mainly to provide web enhanced f2f courses.

The University of Cantabria cannot therefore be considered a mega-provider of e-learning.

1.10. Universidad de Zaragoza

(www.unizar.es)

The University of Zaragoza currently offers 9 virtual courses via the G9-portal.

The institution uses WebCT as the main VLE providing mainly support features for f2f courses. The service is called ADD – Anillo Digital Docente (Digital Teaching Ring). The university's website informs about one full degree and two diplomas that can be done virtually, but the links to further information do not work.

According to the information gathered, the Universidad de Zaragoza cannot be regarded as a Mega-provider.

1.11. Universidad Católica San Antonio de Murcia

(www.ucam.edu) (campus.ucam.edu)

No relevant information found regarding the megatrends criteria.

The "Campus Online" seems to be mainly used as a file server and for administrative means. **Nothing indicates that the UCAM can be**

considered a mega-provider of e-learning.

1.12. Universidad de Murcia

(www.um.es) (campusvirtual.um.es:8004/suma)

Own Virtual Campus called SUMA (Servicios Universidad de Murcia Abierta; Open University Murcia Services). The system offers in four different modules

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- a) administrative services,
- b) extracurricular functions like chats, forums general information panels,
- c) a commercial module aimed to possible contacts with organizations seeking for collaboration and
- d) a "modulo docente" with contents, self-assessment tools, discussion forums, chats, information about programas etc.

The system is used for technology enhanced on-campus courses.

Therefore the University of Murcia cannot be considered a mega-provider of e-learning.

1.13. Universidad Politécnica de Cartagena

(www.upct.es)

The UPCT uses WebCT for its virtual program.

59 subjects offered as technology enhanced on-campus courses. Teachers can apply for a space in the VLE in order to place material and activities related to their f2f courses. The UPCT offers their teachers 3 courses about virtual learning and teaching and shows several demo courses based on WebCT as models to be followed.

The UPCT can not be considered a mega-provider of e-learning.

1.14. Universidad de La Laguna

(www.ull.es) (www.campusvirtual.ull.es)

The Universidad de La Laguna uses MOODLE as its VLE.

Currently about 150 courses offered. The university's website does not offer clear information about how many of these courses are mainly online.

Information about the number of students and enrolments isn't provided either.

1.15. Universidad de Las Palmas de Gran Canaria

(www.ulpgc.es)

Current academic offer over the Virtual Campus:

5 full degrees, 7 master programmes, 23 specialization programmes that sum a total number of more than 450 online courses. The number of registered enrolments for these courses in the year 2005 was 12.237.

The vice-chancellor José Juan Castro Sánchez (928451019, vpc@ulpgc.es), is responsible for the implantation of the ULPGC's virtual campus.

The data facilitated by Mr. Castro clearly indicate that ULPGC is a mega-provider of e-learning.

1.16. Universidade de Santiago de Compostela

(www.usc.es)

The institution uses WebCT as their virtual platform.

No accessible information about online courses and enrolments.

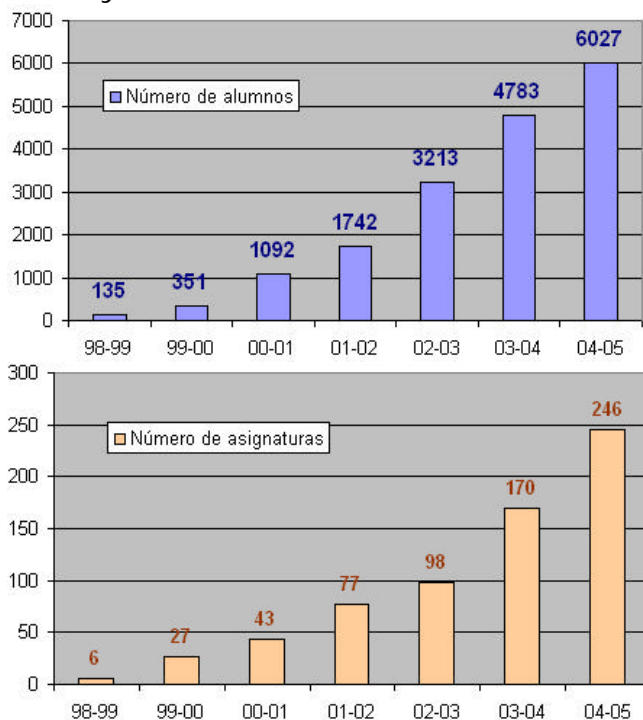
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1.17. Universidad del Pais Vasco

(www.ehu.es) (cv.ehu/campus)

The virtual campus of the University of the Basque Country has grown considerably in the last 7 years. The graphics offered on the university's website show that there were 6027 students enrolled in online programmes in the year 04/05 while the number of courses was 246.



However, the main part of these courses are a mere support for f2f teaching and learning.

The university's recent program (2005; 2006/07) for pure online teaching and learning counts 43 optional courses, 5 of which are offered as part of the G9 group's virtual learning program. (<http://www.uni-g9.net/portal/asignaturas.html>)

The University of the Basque Country can not therefore be considered a mega-provider of e-learning.

1.18. Universitat d'Alacant

(www.ua.es) (cv1.cpd.ua.es)

The University of Alicante uses its own VLE as a support tool for on-campus teaching. The environment has been developed by the Information Technology Services (Servicio de Informática) and the Secretary of New Technologies (Secretariado de Nuevas Tecnologías).

Contacts: Juan Fco. Pérez Ortiz: 965 90 34 00, Ext. 23 93;

innovacio.educativa@ua.es; JF.Perez@ua.es

and Pilar Arcas García: 965 90 93 93 cv@ua.es; Pilar.Arcas@ua.es

As the university does not offer any online courses that meet the criteria established by the project team, **the institution cannot be considered a mega-provider of e-learning.**

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1.19. *Universitat Jaime I*

(www.uji.es) (www3.fue.uji.es/campus)

This university uses MOODLE as a VLE in order to provide mainly web-enhanced f2f courses. This service is called "Aula Virtual" and can be accessed via the university's website. At the same time we can find the following address that leads us to 9 courses offered on WebCT:

www3.fue.uji.es/campus

The small number of courses that seem to be fully online takes us to the conclusion that **the University of Castellón (Jaume I) cannot be considered a mega-provider of e-learning.**

1.20. *Universidad Politécnica de València**

(www.upv.es) (www.upvabierta.net) (www.cfp.upv.es)

The "Área de Universidad Politécnica Abierta AUPA" is the university's institution in charge of promoting the use of ICT in teaching. It encourages the use of the VLE and offers teacher's training in order to improve online teaching. The AUPA also detects educational and technical needs in the context of e-learning.

The institution uses a VLE called "PoliformaT" which is a SAKAI⁸-based platform.

Currently there are almost 18.000 postgraduate online students that can enrol in more than 250 courses.

These figures indicate that the Universidad Politécnica de València is most probably a mega-provider of e-learning. We are waiting for detailed figures to be able to confirm this assumption.

1.21. *Universitat de València*

(www.uv.es) (www.adeit.uv.es)

The University of València provides technology-mediated courses via its foundation, the Fundació Universitat Empresa. The institution's annual report says that in the year 2004/05 a total number of 36 courses were provided. The total number of students enrolled in these courses was 1259. The VLE used is MOODLE.

The figures indicate that the University of València is not a mega-provider of e-learning.

1.22. *Universitat Autònoma de Barcelona*

(www.aub.es) (<https://interactiva.uab.es>)

⁸ To read more about the implantation of the SAKAI-platform in the UPV abierta, check this link:
<http://somi.cinstrum.unam.mx/virtualeduca2006/pdf/177-DRM.pdf>

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The Autonomous University of Barcelona has developed their own virtual campus. The main declared objective of this tool is providing the possibility of blended learning within the classical program of face to face courses. In the past academic year the UAB offered over 2500 courses to more than 27.000 students. About 1300 teachers used the virtual campus as a tool for mostly blended teaching and learning. The "Campus virtual de la UAB" has 6 main tools that provide students and teachers with 6 basic functions: communication, information, materials, works, self-assessment and control. The UAB underlines its preference for blended learning. **The online courses that would fit into the projects definition of e-learning are not enough to be able to call the UAB a mega-provider of e-learning.**

1.23. Universitat de Barcelona Virtual (UB-virtual)

(www.ub.es) (www.ubvirtual.com) (www.il3.ub.edu)

The UB-virtual is the result of a joint initiative carried out by "Universitat de Barcelona" - on the public side - and Caixa Catalunya and Santander Central Hispano, two important banks, that represent the private part of the operation. The declared goal of the joint venture is to strengthen and to harmonize the offer of postgraduate, continuous and complementary educational programs.

The two centers for continuous training and education that belong to the UB, **Les Heures-Fundació Bosch i Gimpera** (f2f teaching and training) and the **Universitat de Barcelona Virtual** (distance education) have recently merged to what is called IL3, the Institute for **Lifelong Learning**. This conceptual mixture is supposed to generate a new impulse to blended learning, for which there is a strong demand, according to the information on the IL3's website (www.il3.ub.edu).

The UB-virtual as the distance learning part of the joint institution offers a large number of online courses (over 60 master and postgraduate programs with their respective courses, almost 100 certificate online courses, more than 200 extension university diplomas) on WebCT. In the academic year 2004/05 21.890 students were registered in UB-virtual, which means that the number of enrollments clearly exceeds the minimum of 5000 necessary to qualify as a mega-provider of e-learning.

Universitat de Barcelona Virtual is therefore a mega-provider of e-learning.

Contact: Elena Subias; Tel.: 0034 93 4037631; esubias@ub.edu

Ignasi Cavalle; Tel.: 0034 93 4037631; icavalle@ub.edu

1.24. Universitat de Lleida

(www.udel.es) (<http://itaca.udl.es>)

The "Unitat de Docència Virtual" (Virtual Education Unit) belongs to the Institute of Educational Sciences and coordinates projects aimed to introduce or improve the use of ICT in the university's educational activity.

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The University of Lleida works with a SAKAI-platform. It only offers a few courses online and it is not clear if they would qualify under the terms of the Megatrends Project.

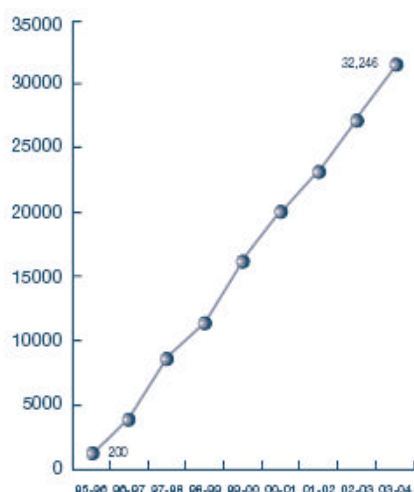
The University of Lleida cannot be considered a mega-provider of e-learning

1.25. Universitat Oberta de Catalunya (UOC)

(www.uoc.edu)

The Open University of Catalonia was created in 1994 and is the first entirely virtual university worldwide. Its educational activity has been frequently awarded (educational quality, best online and distance university, world's best digital opportunity, best European educational initiative) and has a constant and sustained organic growth.

Evolution of the Number of UOC Students



The UOC in Figures 2003-2004

Recognised Degrees, Main Campus	17
Recognised Degrees, Latin American Campus	12
Own Degrees	1
Postgraduate Programmes	158
Students*	32,246
UOC's Teaching Staff	128
Tutors	1,174
Counsellors	332
Subjects Offered*	1,584
Graduates with Recognised Degrees	2,836
Graduates with Master's and Postgraduate Degrees	2,197
Diplomas in Advanced Studies	109
Management Team	337

* Main Campus and Latin American Campus.

(http://www.uoc.edu/web/eng/university/memoria0304/pdf/presentacio_eng.pdf)

The university works with an own virtual campus which is also used to establish inter-university collaboration by creating a *metacampus*.

The Open University of Catalonia has become a reference point throughout the world in the area of virtual education, or e-learning, and aims to lead new initiatives in education, research and dissemination of knowledge.

The UOC clearly meets the Megatrend Project's criteria for mega-providers of e-learning.

1.26. CEPADE – Universidad Politécnica de Madrid (UPM)

(www.cepade.es)

Contact	Ana Ibis López Vara (anaibis@cepade.es)
VLE(s) used	CEPADE has been working with First Class. This new academic year (2006/07) they change to Moodle.

Data for year 2004/2005

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Number of online-courses offered	Total number of enrolments	Average number of enrolments per course
250	6000	24

CEPADE - Centro de Estudios de Postgrado de Administración de Empresas – (Centre of postgraduate studies of company management) was founded in 1971 to cover an increasing demand of knowledge in the field of company management. CEPADE belongs administratively to FGUPM (Fundación General de la Universidad Politécnica de Madrid, a foundation created with the aim to promote science, culture and education within the general objectives of the UPM) but is academically integrated in the UPM. As a result, all CEPADE degrees are in fact postgraduate degrees by the UPM.

According to the figures, CEPADE is a mega-provider of e-learning.

1.27. Universitat Politècnica de Catalunya

(www.upc.es)

The online learning programmes offered by the UPC are mainly blended courses and do not meet the criteria established by the project team. Also the number of ICT-enhanced courses offered does not seem to be high enough.

Therefore the UPC cannot be regarded as a mega-provider of e-learning.

1.28. Universitat Pompeu Fabra

(www.upf.es) (www.idec.upf.edu)

The Universitat Pompeu Fabra is one of the 3 public universities in Barcelona.

The institution offers online distance and blended courses via the Continuing Education Institute (IDEC – Institut d'Educació Continua). Currently there are 9 online master and postgraduate programmes offered which sum a total of 74 thematic modules. The online part represents only about 5% of the whole program offered over the IDEC. The UPF registered in the year 2005 nearly 8000 participants for the total provision of continuing education courses.

Considering these figures, the UPF cannot be regarded as a mega-provider of e-learning.

1.29. Universitat de Vic

(www.uvic.cat)

The University of Vic offers a service called "Campus Virtual" that aims to support students and teachers in their f2f courses.

The Universitat de Vic is not a mega-provider of e-learning

1.30. Universidad Pontificia Comillas

(www.upcomillas.es)

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The institution that belongs to the Catholic Church and is run by the Jesuits offers only 2 master degrees and 6 courses online. The virtual campus is mainly used as a support for face to face teaching. The total number of students in 2004/05 was 7.159⁹.

The figures indicate that UPCOMILLAS is not a mega-provider of e-learning.

1.31. Universidad Politécnica de Madrid

(www.upm.es) (www.gate.upm.es)

The UPM coordinates its ICT-based activities via the "Gabinete de Teleeducación – GATE". In the year 2005, the institution offered around 110 online courses that meet the criteria of the Megatrends Project. These courses cover the areas of optional graduate subjects (enseñanza reglada, cursos de libre elección), lifelong learning (formación continua) and staff training (PDI – personal docente investigador; PAS – personal de administración y servicios). UPM has registered more than 100 enrolments per course and states a total number of 14.000 enrolments regarding the provided online courses.

The figures indicate that Universidad Politécnica de Madrid can be considered a mega-provider of e-learning.

Contact person: Raquel Portaencasa; raquel.portaencasa@gate.upm.es; +34 91 336 61 58.

1.32. Universidad de Extremadura

(www.unex.es)

This university currently offers 10 online courses via the G-9 consortium.

The University of Extremadura cannot be considered a mega-provider of e-learning.

1.33. Universidad Pública de Navarra

(www.unavarra.es)

This university currently offers 8 online courses via the G-9 consortium.

The University of Extremadura cannot be considered a mega-provider of e-learning.

2. Italy

According to *Osservatorio ANEE-Assinform 2005*¹⁰ the overall value of the Italian e-learning market in the year 2004 ascended to 365, 6 million Euros, which was about 18,6 % of the total expenditure on training and education. The estimated growth of this value for 2005 was 17,9% with an increased

⁹ www.upcomillas.es/Presentacion/Documentos/Memoria_Academica_04-05.pdf

¹⁰ The executive summary of the report can be downloaded from:

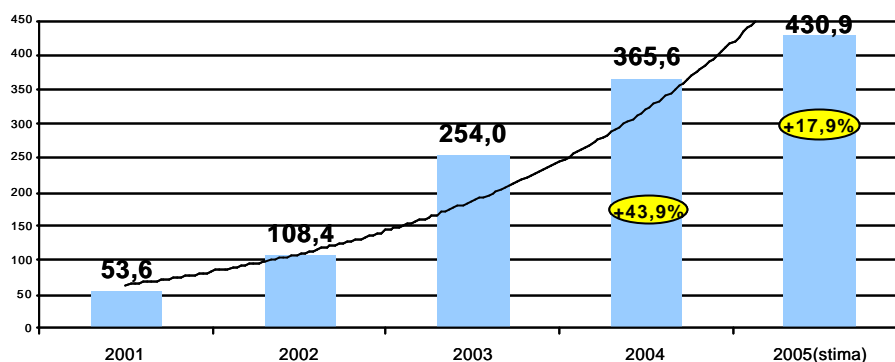
<http://www.anee.it/anee/osservatorio.htm#1>

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value of about 430 million Euros. The figures include content, technology and services/consultancy, the three main business areas of the Italian e-learning scenario.

Figure 1: Evolution of the expenditure on e-learning in Italy



Source: Osservatorio Anee/Assinform 2005

The same study indicates that users consider e-learning an efficient way of learning. Nevertheless, this positive attitude is still not reflected in a corresponding level of usage of the e-learning offer. The traditional classroom is still the most popular environment for almost 90% of the Italian learners, although the gap between the two teaching and learning modes tends to decrease.

The development of the e-learning provision undertaken by the Italian universities can be described as a growing process not only in quantity but also in quality and innovation regarding the offered e-learning solutions¹¹. The table below shows the growing number of universities providing e-learning and the spectacular increase of the number of universities that offer their e-learning courses on a virtual campus.¹²

Indicators	Osservatorio 2003	Osservatorio 2004	Osservatorio 2005
Universities that offer e-learning	72,2%	83%	85%
Universities with a Virtual Campus (Centro di ateneo)	26%	57%	82%

Source: Osservatorio Anee/Assinform 2005

The BSOLE eTEN project (2003)¹³ has identified a number of e-learning projects in Italy, as for example the platform "Postelearning", created by Poste Italiane in order to offer e virtual space for communication to all Italian employees. The initiative promotes the integration between blended solutions with traditional training methods (www.postecom.it). A second example would be the National Citizen Portal, www.italia.gov.it, a service that delivers free online training focusing on ECDL and the use of ICT.

¹¹ Osservatorio Anee/Assinform 2005. Executive summary, p. 9.

¹² Idem, p. 10.

¹³ www.bsole.com

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A third example worth to mention is the collaboration between the French AFPA (the national association for adult education) and the Italian Consorzio Nettuno (a network of 38 Italian universities and companies and the British open universities). AFPA is now broadcasting its programme on the Italian television channel Rai Nettuno Sat 1. AFPA has already programmed almost 150 hours in 5 domains: general education, practical skills of several professions, pedagogy, help in finding a job, social problems. The virtual training programme is supported by online services through the AFPA website¹⁴.

2.1. Sfera*

(www.sfera.it)

"In 1999, Enel (power and gas provider) has created Sfera, a knowledge provider for adult learning and human resources improvement. The learning methods are based on editorial instruments (accessible online) but also on tutoring and mentoring online, virtual classrooms, forum, chat and newsgroup. The e-learning delivery is based on a synchronous shared method because it is based partly on self-training, partly on virtual classrooms, tutoring interaction, online whiteboards, online tests, conferences, forum and chat. The learning contents supplied are the following: IT skills; English language (self-study and teacher-led); management (including a Master's degree online); technical skills for the power sector. Overall Sfera has supplied 1800 online courses¹⁵. In order to have access to the e-learning courses supplied by Sfera, it is necessary to buy an "eLearning card", which can be bought on the cited websites. This card can also be bought in some popular Italian libraries, or at some media suppliers. Sale points of the cards are presently located in 9 Italian Regions. The cards remain active for 6 months."¹⁶

The information available on the sfera-website seems to indicate that we are looking at a mega-provider of e-learning. Unfortunately it has yet not been possible to confirm the figures through personal contact with the representatives of the provider.

2.2. Università Telematica Guglielmo Marconi

(www.unimarconi.it)

The Università Telematica "Guglielmo Marconi" is the first Athenaeum in Italy which follows the "Open University" model, already attended in many European Countries. Being public, but not a state body, recognized by the Ministry of Education, University and Research (MIUR -M.D. 1 March 2004), it adopts innovating learning modalities by developing suitable research strategies for most advanced technological solutions and by integrating non

¹⁴ Interview with Maria Amata Garito, professor of Educational Technology in the Psychology faculty of "La Sapienza" University of Rome and director of NETTUNO (Network per l'Università Ovunque) on "Consorzio Nettuno": <http://www.mediamente.rai.it/mmold/english/bibliote/intervis/g/garito.htm>

¹⁵ Figures for 2004 are: 2000 online courses and 38.500 registered users. It is worth to mention that a considerable number of these online courses have a duration of only two to eight hours.

(<http://www.sfera.it/chi-siamo/cifre.asp>)

¹⁶ www.euser-eu.org

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residential communication tools (E-learning, chat, forum, videoconference, mobile learning, etc.) with in presence activities (workshops, seminars, etc).

Attempts to establish contact with a competent party of this university have, so far, been in vain.

2.3. Università di Trento

(www.unitn.it) Contact person: Giancarla Mase, Direzione Servizi e Comunicazione: giancarla.mase@unitn.it

The University of Trento provides some services in order to support the lecturers in online course design.

These services are addressed to:

- undergraduate and postgraduate students (on campus, distant and working)
- teachers and tutors
- lifelong education

The institution provides three types of eLearning formats:

- web-enhanced courses (in order to support the traditional face-to-face lectures);
- blended courses (lectures are partly face-to-face and partly online);
- entirely online courses.

The amount of our courses (mostly web enhanced - 90%) is 353 in the 2005/06 and the number of students enrolled is 6,048.

UNITN also provides:

- Copyright advice
- Design of multimedia contents
- Design of online assessment
- e-tutoring

The large proportion of web-enhanced and blended courses indicates that the University of **Trento is not a mega-provider of e-learning according to the criteria established by the project team.**

2.4. Università Telematica Leonardo da Vinci*

(www.unidav.it)

This institution has been founded is an initiative of the Università Gabriele d'Annunzio di Chieti-Pescara and of the foundation that carries the same name.

UNIDAV provides 5 graduate programmes that sum a total number of about 120 courses. In addition to that there are 6 master programmes that can be divided into more than 100 single courses or modules.

The university's platform called "Open Learning Center" is based on the "oracle iLearning" application.

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According to the information on the website, the institution seems meet at least the criterion on the number of courses. Unfortunately there is no information available about the number of enrolments.

Attempts to establish contact with a competent party have so far been in vain.

2.5. Scuola IaD – Università di Roma Tor Vergata

Denomination: Scuola IaD, Università di Roma Tor Vergata
(www.scuolaiad.it)

Contact	Aurelio Simone , Director Mail: direttore@scuolaiad.it Tel : ++390672594881 Andrea De Dominicis , Consultant International Relations Mail: dedomi@scuolaiad.it Tel: ++390672594881
Types of courses offered	first cycle degrees, master, Continuing Education in Medicine, IT education as ECDL, EUCIP, IT administrator and Linux and adult continuous education
Nr. of teachers: aprox 200 Online courses since: 2001	

Data for year 2004/2005

Number of online-courses offered	Total number of enrolments	Average number of enrolments per course
120	5000+	42

Scuola IaD is an interfaculty Unit of University of Rome Tor Vergata. It provides a wide range of online education courses (first cycle degrees, master, Continuing Education in Medicine, IT education as ECDL, EUCIP, IT administrator and Linux and adult continuous education).

Scuola IaD's institutional frame (a horizontal body through different faculties) facilitates the access to a significant pool of competencies and it exercised a pioneer role in the Italian online education scenario.

Scuola IaD is inserted in a prestigious and scientific-oriented University (<http://web.uniroma2.it/>) which provides research and technological support for online education development.

It is engaged in developing "continuous and adult education" and it has a long tradition of partnership with social and economic actors (both public and private) Scuola IaD Director is member of the University Ministry Working Group for Life Long Learning and E-Learning.

Scuola IaD is living laboratory to study innovation dynamics inside traditional academic environments. It is a member of EDEN and ICDE

Scuola IaD can be considered a mega-provider of e-learning.

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2.6. Nettuno-Network per l'Università Ovunque*

(www.uninettuno.it)

In addition to the information given earlier on, the Nettuno-website can be quoted as follows: "Nettuno is the first television and telematic University in Europe, using two satellite television channels RAI NETTUNO SAT 1 and RAI NETTUNO SAT 2, and an Internet-based Didactical Portal

(www.uninettuno.it). Promoted in 1992 by the Ministry of the University and Scientific and Technological Research, NETTUNO is a Distance University that starts off from traditional universities. Italian Universities, International Institutions and Universities and technological companies created a non-profit association and they jointly design methodologies and contents of degree courses, distance masters and professional training and re-training courses. [...] The didactic psycho pedagogical model is a mixed one that combines benefits offered by the traditional teaching and by guided learning, with those offered by a teaching distance model by means of new technologies. The same professors, who carry out research work on knowledge contents at traditional Universities, are also face to face, as well as distance courses teachers. [...] The delivery models are the following ones:

1. Traditional Method:

- Direct interactions between teacher/tutor and students;
- Seminars and practical assignments carried out at the University technological poles;
- Exams and assessments.

2. Distance Method:

- Academic lessons (video lessons broadcast on satellite television channels RAI NETTUNO SAT 1 and RAI NETTUNO SAT 2 and on the Internet via satellite);
- Practical exercises on the Internet via satellite even through virtual laboratories;
- Distance tutoring by audio and video chat, forum and videoconferencing."

In spite of this declaration in favour of a more blended approach, Nettuno also offers a number of full degree programmes completely online for students that are unable to attend on-campus activities. After having been contacted via e-mail, Dr. Maria Amata Garito, director of Nettuno, affirmed that the institution meets the criteria established by the project team, but concrete figures haven't been provided yet, nor has the survey been returned.

2.6. Università degli Studi Di Milano

(www.unimi.it)

The Milan University (Milano Statale) provides a "Piattaforma Ateneo" called "Ariel" (<http://ariel.ctu.unimi.it/corsi/portal/user/loginHome.asp>) This portal currently displays a variety of programmes and courses that are mainly based on blended learning approaches. The institution offers support to teachers that wish to provide online courses via the Centro Televisivo Universitario (<http://ariel.ctu.unimi.it/corsi/portal/user/loginHome.asp>).

The information given on the university's website does not suggest that UNIMI could be considered a mega-provider of e-learning.

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2.7. *Università Bocconi (Milano)*

(www.uni-bocconi.it)

This university calls its e-learning Project "B-Learning" and uses "Lotus Learning Space" by IBM as a learning platform. The information given about the e-learning efforts undertaken by UNIBOCCONI indicates that this institution uses ICT exclusively to support traditional learning scenarios.

Università Bocconi cannot therefore be considered a mega-provider of e-learning.

2.8. *Politecnico di Milano*

(www.polimi.it)

The portal "COL" (Corsi Online) exists since 1998 and is a free service that publishes the resources related to the face to face courses offered by the university. It also provides some communication tools in order to improve and facilitate contact between students and teachers.

Politecnico di Milano also offers a graduate programme (INGEGNERIA INFORMATICA) which is completely online. This course belongs and is accredited through "CampusOne", an experimental project promoted by CRUI, the Italian University Director's Conference and financed by the Ministry of Education, Universities and Science (MIUR). A total number of 68 Italian Universities have adhered to this project, providing over 270 courses altogether. The highest number of courses offered by one single institution is 5.

The data gathered on the website of Politecnico di Milano does not allow to consider the institution a mega-provider of e-learning.

2.9. *Università degli Studi di Napoli Federico II*

(www.unina.it)

The Naples University offers online services over a portal called DoL – Didattica online. (<http://www.dol.unina.it>)

These services have the unique objective to enhance f2f courses.

UNINA is therefore not a mega-provider of e-learning.

2.10. *Politecnico di Torino**

(www.polito.it)

Politecnico di Torino currently offers 7 graduate programmes fully online (6 in 2004/05). The website does not offer any further information about this e-learning provision. The institution has been contacted in order to receive more details.

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3. Portugal

"eLearning is not yet consolidated enough in Portugal to offer a viable alternative to traditional educational structures. In fact, no national policy specifically addressing eLearning exists. Within the most relevant instrument, the Portuguese Action Plan for the Information Society (PASI), no reference of an eLearning policy can be found other than action 2.3.1 "Develop e-learning courses" of measure 2.3 "Lifelong Learning" of item 2 "New Competences", which can hardly qualify as a structured policy. With respect to existing providers of eLearning, a look at the public sector is disappointing [...]. For their part, the two main distance learning providers in Portugal, the Open University - "Universidade Aberta", and the Mediatized Basic Teaching, "Ensino Básico Mediatizado", both combine traditional teaching methods with eLearning multimedia packages or video technology to provide basic education services to some populations. Similarly, some private sector training companies offer the alternative of offline eLearning (CD-ROM). Main providers on the Portuguese market appear to be CEAC, CCC and CampusEsine. Again, however, only one full eLearning course is provided by the Naval Centre for Distance Learning (Centro Naval de Ensino à Distância), which offers distance learning for Recurrent Secondary Education for a specific type of qualification: the Military Sergeants' Course."¹⁷

3.1. Universidade do Porto

(www.up.pt)

The institution has currently about 28.000 students at 15 different university schools or faculties.

Universidade do Porto started to offer e-learning activities on an experimental stage in 1998 and created for that aim a special service, the "Departamento da Universidade Digital". The main objective has always been to provide on-campus students with an additional channel alongside face to face studies. At the same time, online applications (the university uses WebCT and MOODLE) were used to improve internal communication and coordination between the different faculties.

Presently the University of Porto offers about 70 online courses for approximately 5000 students. These online courses however do not meet the criteria established for the Megatrends Project due to the fact that they are specifically designed to support f2f teaching and learning. In addition to that, the University of Porto does not yet consider the possibility of giving any accreditation for course content presumably covered by online, off-campus activities from a legal point of view. The assistance to f2f scenarios is, therefore, compulsory and it always represents the main proportion of the course content.

Nevertheless the Department for the Digital University is planning to increase the number of pure online courses in the future.

¹⁷ http://www.euser-eu.org/eUSER_eLearningCountryBrief.asp?CaseID=2251&CaseTitleID=1092&MenuID=117

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Unfortunately at this time Universidade do Porto can not be considered a mega-provider of e-learning.

Contact person: Rita Rodrigues Clemente Falcão Berredo Couceiro da Costa
Responsible for the "Departamento da Universidade Digital"

Telephone: 223 401 563

Mail: rfalcao@iric.up.pt

3.2. Universidade do Minho

(www.tecminho.pt)

The University of Minho uses WebCT to provide online courses to their graduate students. According to our contact person, Ana Dies (Ana Dias, e-Learning Manager in the Minho University Continuing Education Center (TecMinho); anadias@tecminho.uminho.pt ; Tel.: +351 253 510 594) the number of provided courses is not high enough to meet the Megatrends Criteria.

The e-Learning-Center TecMinho itself is a University Interface and deals with "Continuous Training Courses" for on-campus and off-campus targets (having around 10 e-learning courses per year). It is a technology transfer and training institution inside Minho University (like a Fundación Universidade Empresa).

The data that have been gathered about Minho University do not point to a mega-provider of e-learning.

3.3. Universidade Aberta

(www.univ-ab.pt)

Universidade Aberta, the Portuguese ODL state university, is currently offering about 100 post-graduate courses online, on a totally virtual mode. However, next year, following the implementation of the Bologna Process in Portugal, the university is going to almost double the current amount of post-graduate courses delivered online. On the other hand, Universidade Aberta is also on the process of converting its ODL graduation courses to e-learning. Consequently, it's expected by the end of the decade about 10.000 students will enrol every year on an e-learning or online course by Universidade Aberta.

According to these figures, provided by António Teixeira, Pro-rector for Innovation in Distance Learning (amt@univ-ab.pt), **Universidade Aberta can be considered a mega-provider of e-learning.**

4. Greece

Adult distance education in Greece became initially available in 1998 with the founding of the Hellenic Open University (EAP, www.eap.gr). The Open University offers the opportunity to study at home, at any time and pace of learning. Everyone who is over 23 years of age and has obtained a secondary education diploma can be accepted to the university's

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undergraduate programmes without preliminary examinations; the university also offers full Master's and PhD degrees. Courses at the Hellenic Open University are delivered exclusively at distance. And students communicate with professors via traditional (courier, telephone) and newer (fax, e-mail) forms of distance communication. Students must pay a tuition fee for each thematic unit they choose to follow; however, scholarships are offered as well. Studies are certified at five levels ranging from the beginning of tertiary education to a post-doctoral degree. The public in Greece has enthusiastically welcomed this new learning opportunity: For the academic year 2003-2004, the university had an enrolment of 8,976 undergraduate students, 5,133 Master's students and 24 PhD students. The university received 65,979 prospective student applications for the academic year 2004-2005 for a total of 5,257 places. So far, the number of Open University graduates has reached 2,083.

Most Greek universities are starting to develop eLearning platforms mainly for the use of their own students, but some also offer access to the general public. Examples, many of which are still in an early stage of development, include:

- Greek Universities Network Gunet (http://www.gunet.gr/index_en.php) - A catalogue of 66 available courses for Greek university students and professors, some of which are open to the general public.
- Ifigenia - Distance Education Courses - The University of Crete (www.uoc.gr) is currently developing web-based courses suitable for online distance education.
- Computer Networks and Telematics Applications Lab (CONTA) by University of Macedonia (www.uom.gr) - offers online seminars on Telematic Applications & Computer Networks, Information Systems in Education and Web-based Tele-Education.
- Vocational training centres are currently being developed by three Greek universities:
- Tele-education Centre by Athens University of Economics and Business (<http://www.stat-athens.aueb.gr/en/frames.htm>);
- Vocational Training Centre by Panteion University (<http://www.panteion.gr/uk/>);
- Vocational Training Centre - National and Kapodistrian University of Athens (www.uoa.gr).¹⁸

None of these institutions meet the criteria established for the Megastrends Project.

4.1. Hellenic Republic Hellenic Open University *

(www.eap.gr)

The HOU is the 19th Greek State University but the only one that provides distance education in both undergraduate and postgraduate levels via the development and utilization of appropriate learning material and methods of teaching. Promoting scientific research as well as developing technology and methodology in distance learning fall within the scope of HOU's objectives.

¹⁸ www.euser-eu.org

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The courses are designed according to the distance learning methodology. According to this methodology students study using books and study – guides designed to be compatible with the D.L. methodology, participate in 5 tutorials for each module taking place in 8 towns, communicate with the corresponding tutor by telephone, fax, email and letters, prepare 4 – 6 assignments for each module and finally take a final examination 10 months later, that is at the end of each module. The students of module are placed into several student – groups. A tutor is allocated for each group of a maximum 32 students who inhabit in a certain geographical region. For the academic year 2002/03, the website of this university provides the following figures:

1. Undergraduate students 8.251
2. Postgraduate students 4.436
3. PhD students 19
4. Number of Courses being offered 22
5. Number of Modules being offered 106

These figures seem to indicate that the Hellenic Open University is a mega-provider of e-learning. However, this assumption could not be confirmed to be right yet.

5. Malta

The current supply of e-learning courses in Malta is very weakly developed. There are three public providers involved with e-learning of which one, the University of Malta, is still developing its first online modules. The other two players are the Department of Further Studies and Adult Education and the Ministry of Investments, Industry and Information Technology. Each of them offers only one to two online courses¹⁹.

No mega-provider of e-learning could be identified in Malta.

¹⁹ See www.euser-eu.org