

**MEGATRENDS COUNTRY REPORT  
HUNGARY, SLOVAKIA AND SLOVENIA**

*Report compiled by the European Distance and E-Learning Network*

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## Introduction

The MegaTrends project's main objective is to identify and analyze examples of excellence that demonstrate sustainable and cost-effective large-scale e-learning provision. The partnership has developed strict criteria that had to be taken into account when selecting the examples for further analysis. The term "megaprovider" refers to institutions that offer more than 100 courses at any one time and has more than 5000 course enrolments per year. An appointed course only qualifies if at least 50% of it is normally completed by e-learning.

The present report aims to introduce three Eastern-European countries e-learning megaproviders. The situation of ICT and e-learning in the Central Eastern European region can best be understood by realizing that for these newly accessed countries the challenge of modernization and the building of the information society all starts from a drawback, and adds up to parallel, cumulative tasks. Certainly, in this field also, the accession played a very important part in the definition of the national strategy and priorities but there is still a lot ahead that they need to overcome and compensate the huge gap between them and Western Europe and the USA.

The main constraints on the researched region's providers to create a strong e-learning provision, are the following:

- difference in languages,
- difference in the state of the economy,
- difference in education and training systems,
- difference in the national curricula and examination,
- difference in cultures,
- difference in the market size.

The common features of Hungary, Slovakia and Slovenia are that they are all small countries with official languages not typically spoken beyond their borders. The cost of creating e-learning content in their national languages is very high. In the case of Slovenia, the differences are present even within the country: although a small one, the regional differences (from language dialects to economic developments) are surprisingly strong. Also, these countries have only joined the European Union relatively recently, therefore they are only slowly opening up their educational programmes to the larger public. Another commonly applicable phenomenon in these countries is that their larger-scale e-learning initiatives are mainly considering the development of mainstream education, slowly supplementing higher education (HE) institutions' programmes with e-learning elements, such as electronic administration portals and the use of Learning Management Systems (LMS-es). In most cases these initiatives are yet in a premature stage to meet the project criteria, but they are definitely strong and promising, and they are likely to reach a stage when some of them can be added to the MegaTrends list sooner or later.

There were several initiatives both national and union level which aimed at e-learning development and the building of the information society in general. One of the programmes which main aim was to support the national governments in their efforts for the development of the information society was the eEurope+ initiative in 2001. The eEurope+ was carried out with the participation of the then candidate countries, and the countries of the next round of accession (Romania, Bulgaria) and Turkey. The goals of the initiatives – mirroring that of the eEurope initiative – are the following:

- to foster the economic reforms and modernisation;
- to help the organizational development;
- to support competition and
- to facilitate social cohesion.

The goal of the program was to survey, to analyze and to stimulate and to support the national governments in their definition of the national action plan for the development of the knowledge society. In these initiatives, a strong emphasis was put on the commitment of the given government.

The surveys were concentrated on the following fields:

- the development of and the access to telecommunication infrastructure (bandwidth, the degree of digital divide, system security);
- the presence of ICT in education and in research;
- the existence of public e-points;
- access of those who are living with disabilities;
- the relation between ICT and gender: does a digital divide exist between genders, what is the proportion of women and men among Internet users, and what is the proportion of gender in IT education;
- how would it be possible to encourage the use, how often and where do people have access, and what is the purpose of their usage.

Besides education, the other two research topics were eBusiness and eGovernment. Considering eGovernment, it was surveyed what kind of on-line services are accessible to citizens and to businesses, the on-line presence in the healthcare sector, and the existence and level of the information flow between the different sectors. The report stated that the participating countries in the four years of the program were successful in many objectives or at least they are on the right way to meet them, but there are still a lot of steps ahead to create the knowledge society (the program made actual suggestions to the national governments).

### *MegaTrend research*

The investigation conducted by EDEN was two-folded. On one hand, using EDEN's professional experience, clearly relevant cases directly could have been identified; on the other hand, by the use of EDEN's extensive contact list, there was a great coverage of all three countries. The validation of the research's findings derives from the fact, that all of the EDEN network was invited to provide information about the state of the art of the e-learning in the selected countries and in the region in general as well as informing us of relevant case studies, providing us with contact of the major providers.

There was a lot of feedback from the network members although the majority of them came from the western countries. At the moment, the EDEN network has more than 850 members, representing almost 350 institutions, covering 50 countries (see the figure below).



**Figure 1** EDEN members' geographical coverage (a. NAP members, b. Institutions represented in the membership, c. Institutional members from left to right)

Given this massive coverage of the international e-learning scene, it was very apparent that the reason we did not receive any feedback from Slovenia and Slovakia about e-learning megaprovision was most likely the fact that there are not any. This assumption was later confirmed by the region's experts whom were contacted personally. The report is the result of formal and informal conversations with experts, feedback from the EDEN members and desk research conducted by the research team of EDEN.

## Hungary

Connected partly to the eEurope+ initiatives, in Hungary there were significant government programs in the recent years to develop the information society. The main obstacles of the development – similar to the other recently accessed EU countries, but different in degree and orientation – the relatively low individual consuming power, the high telecommunication and PC prices and the relatively highly cost sensitive e-learning market. The educational systems are burdened with general funding problems and the lower level of technological provision and Internet access is only slowly decreasing. The conservatism and the lack of funding of the educational institutions, furthermore the less consolidated market situation is proposing a further burden. It is obvious that the challenges of the modernisation and the informatics development can only succeed if it is carried out together with the strategic issues of human resource development.

However, regarding the e-learning provisions Hungary is most probably in the most developed state from the three investigated countries. The major obstacle of becoming a megaprovider in Hungary lays in the number of enrolments, that is due to the (relatively) small Hungarian speaking population and/or lack of foreign language courses. Theoretically, by the introduction of accreditation, many HE institutions could offer their courses to students from other EU countries, but practically this potential is not exploited to a satisfactory extent yet.

Among those elements that help the development of the e-learning market are

- the development of the e-learning culture,
- the development of infrastructure,
- government initiatives that stimulate demand (tax relief programmes, central funding of the developments of the institutions, government partnerships to help learners and teachers to get free software etc.),
- the development of the standards,
- the reliable certification systems,
- the development of accreditation, and
- the supporting of innovative pedagogy.

Our extended research in the field covered a wide spectrum of potential major providers. The investigated cases came from

- Distance education (DE) initiatives that are gradually transforming into e-learning programmes.<sup>1</sup> The expected results of the EU accession is that in accordance with the strategy of life long learning (LLL) – especially in public services and in business fields, in the non-profit region and for those working in HE – individual learning experiences gained through distance learning will play an important role and that distance education will also likely to gain more focus in the case of SMEs, given that the participation in traditional courses in their case results in shortfall in capacity.
- HE institutions that are introducing e-learning into their praxis. The use of e-administration is widely spread amongst HE institutions and the Virtual Learning Environments (VLE-s, or

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<sup>1</sup> New data from the National Statistical Institute show that distance education in Hungary is very popular at college level. In 2003/2004 educational year there were 140,491 students enrolled in distant education (26% of all students). From the total amount of students involved in distant education 64% studied at colleges. The share of students in adult education (who have already entered the job market) is not given.

LMS-es) are also becoming mainstream applications, especially since freeware programmes appeared on the “market” as well. Several institutions are known to develop their own, self-tailored LMS-es internally.

- Corporate organizations using e-learning that, by magnitude, can qualify as megaproviders (The Hungarian postal services, the army, banking corporations, insurance companies).

Considering all the formal and informal information gained through the EDEN network, it can be stated that surrounding e-learning, the illusions have gone, the previous euphoria gave place to a more down to earth consideration. After sobering, a slower but steadier growing is expected, the market will consolidate, and the need for newer generation, clean, more tailored to individual needs solutions will grow. The most important present processes is that the supply of on-line learning technologies and contents are growing, there is a convergence between technologies and methodologies, the different approaches cleared. The consolidation of market is expected as well as the appearance of mass products. It is also important to pinpoint, that the acceptance of e-learning products is changing for the better in every sector.

It is necessary that the e-learning reach that critical mass in the different educational sectors, from education, to vocational training, through higher education to corporate training, so that the advantages of technology can be used economically. Based on the surveys of the recent years, the main obstacles are the expensive ICT expenses, the lack of basic skills (there are mentions of 6,5 million digitally illiterates in the country of 10 million), and the missing home infrastructures. In Hungary according to people salaries, the Internet services are still very expensive, the needed infrastructure is still missing in many cases, same as the motivation. For example adult learning, although possibly one of the main fields of the use of ICT, is still under motivated by both the employees and the employers.

Hungary stepped into the leading pack of European countries for Internet access of schools by starting the “Sulinet” program in 1997 which is the national ICT and e-learning program for public education<sup>2</sup>. It is also the most important hardware and content provider in the field of education. The program encourages the acquisition of computers for children in private households as well and the parents to learn how to use them, through a parallel initiative, Sulinet Express Program which offered tax refund up to 50% when buying computers<sup>3</sup>. However, the Sulinet Express program did not result in an extensive growth in ICT inclusion: mostly those, who already possessed ICT infrastructure, have taken advantage of it. The program will be shot down from the 1<sup>st</sup> January 2007.

In 2004 the Ministry of Informatics and Communications has started its Public-net program in 2004 to provide all schools with broadband Internet access and multimedia laboratories. In addition to the above mentioned developments mainly focused at schools, the use of ICT spreads at a dramatic speed in Higher Education although the sector still lags behind well-developed western countries. There are significant achievements however:

- All higher education institutions are connected to the Internet with appropriate bandwidth through the National ICT Infrastructure Development (NIIF) network.
- Application information system: the nationwide application to higher-educational institutions is supported by local and national systems. The central information system is well suited for the present institutional structure. Further development of this system can be one of the pillars for other information systems in the future.
- Computer coverage: the 100000 PCs for approximately 400000 people show a moderate, but acceptable ratio.

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<sup>2</sup> Sulinet is mainly focusing on initial primary and secondary education in schools.

<sup>3</sup> In 2004, more than 16 billion HUF was claimed back by the taxpayers.

However, in the same time there is a lack of systematic learning methodology, which would be necessary to take the full advantage of what the technology makes possible. The question of quality is also a reoccurring issue.

The new paradigms of e-learning and ICT in education and training helped to gain a strong position for education and learning in the political climate. However, the faster consolidation is hindered by the fact that the political programs adopt these considerations without thorough preparations, lacking fundamentals. Also given the rhapsodic government changes in every four years resulted in a situation, where every new government wants to reform the education and the training system, so nothing ever gets carried out fully and evaluated properly. There is a need for coherent, long term and stable education policy and programs.

According to the Hungarian Gallup Institute (their detailed e-learning directory can be found here: <http://www.gallup.hu/oktatas/ip/elearning/magyar/mint.htm>), the main e-learning suppliers (although not meeting the project criteria of a megaprovider) are:

- “Sulinet” in collaboration with Ministry of Education (<http://www.sulinet.hu>)
- Kodolányi János University College (<http://www.kodolanyi.hu/>)
- “Gallup Távoktatási Központ” (Gallup Distance Education Centre): public educational quality development (<http://www.gallup.hu/english.htm#edu>)
- “Szaktanfolyam.hu”: Technical courses (<http://www.szaktanfolyam.hu/>)
- “Eszterházy Károly Foiskola” (Eszterházy Károly College): distance education and e-learning services (<http://www.ektf.hu/english/index.html>)
- eMenedger Online/Education
- Hewlett Packard/E-learning
- Internet Business Center Network
- “SZÁMALK” Open Business School (which operates the Denis Gábor College) (<http://www.szamalk.hu/English/Default.htm>)
- “Tr@iner” Education Centre (<http://www.trainer.hu/index.php>)

## Slovakia

In principle, the above listed general observations also apply to Slovakia, therefore, in this chapter only specific facts and considerations will be listed and discussed. These data and information are selected literal quotes from the “eLearning country report for SLOVAKIA” (to be found at <http://www.euser-eu.org/ShowCase.asp?CaseTitleID=606&CaseID=1244&MenuID=109>)

### *Current supply of e-learning courses (and related services)*

The Slovakian e-learning programmes are rather self-motivated initiatives, as (unfortunately) there are not any national policies for fostering e-learning yet.

Several **universities** have developed e-learning courses (partly thanks to grants from the Open Society Foundation, Bratislava). Most advanced in the area of e-learning are probably the following universities:

- University of Zilina (they have an e-learning programme in a pilot phase),
- Technical University of Kosice
- University of P.J. Safarik in Kosice
- the Slovak Technical University in Bratislava

Target groups of these courses are university students and participants of further professional education courses. Estimated number of participants is a few hundred.

Some e-learning activities are carried out also within the **Infovek Project** aimed at connection of all (secondary and primary) schools to Internet and provision of training activities (including e-learning).

Courses on a basis of e-learning are to a small extent delivered by a few **private training companies** (e.g. Elfa Ltd.) especially in the area of ICT and marketing (in most cases it is however blended e-learning).

Practically all large **IT companies and banks** provide e-learning training courses to their employees within their in house training system, but no official statistics could be tracked for this report. Probably the largest e-learning initiative in Slovakia is the CISCO Network Academic Program.

### *Role of distance education in the country*

It was indicated in the report’s Introduction, that perhaps the highest potential of becoming a megaprovider (in Central Eastern European countries) lays in the reform of traditional education and the innovation (digitalisation) of paper-based distance education. In fact, the importance of distance education, as the precursor of e-learning, for adult education in Slovakia has never been very big, as even the role of distance education in Slovakia is arguable.

In 1994 a big multi-country Phare project started which had two phases and finished in 1999. Five different local centres of distance education (DE) have been established within this project, all of them as so called “special purpose units” (local distance education centres) at the following Slovak universities: Slovak University of Technology in Bratislava, Technical University in Zvolen, Technical University in Kosice, Slovak University of Agriculture in Nitra, and University of Zilina. All of these centres were coordinated by the Slovak National Distance Education Centre based in Bratislava at the Slovak University of Technology. City University Bratislava acted as a methodological centre for the DE centres in Slovakia. After the end of the Phare project the centres tried to cooperate and establish

a solid base for DE provision. Most of them concentrated on provision of DE courses within further education. Only three of the centres have participated actively in the provision of DE university graduate courses at their home universities (University in Zvolen, Zilina, and Bratislava). The current situation in university graduate studies in a DE form is as follows: approximately 100 students study graduate program at the Slovak University of Technology (study branch Electrical Engineering), approximately 250 students at the Technical University in Zvolen (study branch Corporate Management), 60 students of bachelor study at the Technical University of Kosice (study branch Geotourism).

All of the above mentioned centres provide life-long education (mostly short term) courses in DE form. The number of students varies.

Slovakia has sizable ethnic minorities, mainly Hungarians. That may be the explanation why (as it was mentioned in the previous chapter about Hungary) the Dennis Gabor College is quite strongly represented here as well, therefore (in a way) can also be considered as megaprovider in Slovakia.

### ***Continuing education in Slovakia***

Another important factor enabling the initiation and spreading of the use of e-learning is adult education. Continuing education can be provided as:

- Education preparing participants for acquisition of a certain educational level; the acquisition of education leading to a desired educational level and to certain educational certificates. This is provided by primary schools, secondary schools and universities in accordance with special legislation (Law No. 29/1984 on Primary and Secondary School System (Education Act) as subsequently amended and the Law No. 172/1990 on Universities as subsequently amended);
- Professional education and training enabling participants to widen, deepen or replenish their knowledge and proficiency, or to attain a qualification to perform a certain activity. Professional education also includes retraining according to special legislation (Section 80 of the Law No. 387/1996 on Employment). Certificates confirming the acquisition of such education are issued by institutions of CE accredited as defined by this Law; and
- Special-interest education, civil education and other education, which enables participants to satisfy their interests and to become fully involved in the life of society. Certificates indicating the acquisition of this form of education are issued by the institutions providing this CE.

In Slovakia provision of non-degree education is not restricted to particular types of organisation (it is so called “unregistered trade”). Many small and medium-sized companies providing training courses have emerged recently. However, provision of CE by other types of educational institutions (i.e. secondary schools, educational institutions of municipalities, and professional organisations) fluctuated, while provision of CE by other types of organisations (including civic associations, educational institutions of state administration etc.) decreased.

### ***Overall supply-demand match with regard to e-learning in Slovakia***

Supply of e-learning is currently not sufficient and well developed, nor is statistical data demonstrating interest of the public currently available. In general, there is an interest in e-learning services, especially in courses leading international certificate. Actually not every course which is marketed as an e-learning course is a “full fledged” e-learning course. Demand, to some extent, is hampered by still low penetration of Internet, including connection of households to Internet.

Some new projects are underway within EU funded projects (e.g. Leonardo da Vinci programme – development of an e-learning web portal eEDUSER; development of a virtual incubator for training and support for high-tech SMEs), but (at the end of 2004) they are only in a development or pilot phase.

## Slovenia

As in the case of Slovakia, in principle, the CEE general observations also apply to Slovenia, therefore, in this chapter only specific facts and considerations will be listed and discussed. These data and information are selected literal quotes from the “eLearning country report for SLOVENIA” (to be found at <http://www.euser-eu.org/ShowCase.asp?CaseTitleID=607&CaseID=1245&MenuID=109>)

By way of introduction it is important to point out that a knowledgeable and reliable source and valuable personal EDEN contact, Ms Margerita Zgamažster, Deputy Directress of the Slovenian Institute for Adult Education<sup>4</sup>, has reported that there are no e-learning providers in Slovenia that would meet the MegaTrend requirements, even though Slovenia is one of the more advanced countries concerning penetration of the Internet and computer infrastructure<sup>5</sup>. DOBA Group is the largest (private) e-learning provider in Slovenia, but even their statistics (<http://www.doba.si/eng/facts.asp>) do not allow them to be nominated as megaproviders.

### *Traditional distance education in Slovenia*

The first activities related to introduction of distance education in Slovenia started in period 1991-1993 within the University of Ljubljana at the University Research and Development Centre and the Faculty of Economics. This period was characterized by studying distance education theory and cases of good practice in the field of distance education in Western countries. In 1994 Slovenia was involved in the Phare Programme, which lasted from August 1995 until autumn 1999.

In the late nineties the interest in distance education and e-learning within the higher education (HE) institutions in Slovenia has been growing. Many HE institutions implement projects in the field of e-learning, some are developing on-line courses as a mean for enriching traditional forms of education. Apart from HE institutions, there are other institutions embarking on e-learning development at the level of primary and secondary education mostly as a mean for enriching traditional forms of education. Nowadays, e-learning or on-line distance learning at tertiary education institutions through the Internet, at least in the form of individual subjects of study programs, is provided by 17% of surveyed institutions, whereas a complete study program is provided by 9% of institutions, with almost 35% of surveyed institutions preparing individual subjects for on-line distance learning, and one fifth institutions preparing whole study programs for on-line distance learning (Lesjak, D., Sulcic V., Trunk Širca, N., Vehovar, V.: Information and communication technology in tertiary education institutions in Slovenia. a prerequisite for e-learning; 2004).

In 2002, the Ministry for the Information Society with the help of the Ministry of Education, Science and Sport launched an interesting project entitled E-school, under which schools are opened up to everyone. Anyone can enter the classroom of e-schools and, with the help of a mentor who is always present, learn basic computer skills and how to find information, including about adult education through the Internet.

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<sup>4</sup> Slovenian Institute for Adult Education is the national institution for counselling in the field of adult education. Annually, the Institute perform 4.000 counselling hours- for institutions active in the field of adult education as well as for individuals who wish to get involved in education or learning. In addition to providing information by phone or directly, through personal contact, the Institute has established a Counselling E-forum within SIAE's web site. The wider public is being kept informed by public media.

<sup>5</sup> According to data issued by the Statistical Office of the Republic of Slovenia (2004), there were 47% households with access to the Internet and 673,453 Internet users who represent 43% of the Slovenian population aged 16 to 74.

### ***National policies for fostering e-learning***

At the government level, the former Ministry of Education Science and Sport in coordination with other ministries and state bodies held primary responsibility for the development of national strategies regarding e-learning, but so-called “national policy for fostering e-learning” has not been developed yet. What is missing at the moment in Slovenia is the existence of supportive deliberate educational policy fostering the development towards e-learning in order to provide stable conditions and keep pace with current trends in this field.

First projects and initiatives in the field of e-learning started in Slovenia in late nineties. In the framework of the frequently mentioned Phare Programme two on-line courses were developed and 20 persons were trained in the field of e-learning.

In the National Programme for Higher Education approved by Slovenian Parliament in February 2002 the clear priority is given to the further development of distance education and e-learning.

In order to fill the gap regarding e-learning, Ministry of Education, Science and Sport approved the project Distance Learning in Slovenia in 2002. The project’s main objective is to elaborate national strategy in the field of e-learning covering different aspects as organisational, didactical, economic, technological, legal etc. for different levels of education system in Slovenia. The partners in the project hope that the project aim will be achieved and that the proposed national strategy on e-learning will be officially approved and afterwards implemented very rapidly.

### ***Current supply of e-learning courses (and related services)***

According to an evaluation from 2001 (Steinbeis Transfer Centre, Germany) Slovenia is seen as having leading expertise in ICT applications for education and training within the region. However, the number of online courses offered by educational institutions is still rather small and investment in ITC-based course is somewhat sporadic.

According to recent data (D.Lesjak, N. Trunk Širca, V. Sulcic, Electronic Learning in Slovenia, 2003) there were 26 web pages in Slovenia through which distance education was performed. However, the majority of pages focus the primary and secondary school market or regular students in higher education.

**Learning languages** online are offered by the above mentioned DOBA, Vocational College Maribor. Online courses or alternatively CD-ROMs are offered to learn English or German. The students study independently at home in “virtual classrooms”. In addition, personal support service by mentors is available.

**Computing courses** online are offered by NEVRON do.o. Interactive solutions, a company with the mission to encourage the evolution of user-friendly, simple and effective e-learning solutions, mainly focusing on IT training. The “Virtual Academy” was established at the beginning of October 2004. Three methods of learning online are offered: “eCompanion”: independent learning through the Internet with the support of the automatic eMentor; “eCounsellor”: learning through the Internet with the permanent support of the mentor; eMentor: combined learning through the Internet with the intensive support of the mentor.

**Higher educational programmes** online are available through

- The “Virtual University” which provides links to faculties and schools of higher education that are members of the University of Ljubljana.

- [www.e-studij.net](http://www.e-studij.net) portal which is a source of information and knowledge about e-learning. It suits the need of various institutions as well as individuals interested in e-learning. Providers: Faculty of Economics, University of Ljubljana and Educational Institute DOBA in Maribor.
- DOBA which has begun in the study year 2000/2001 to implement the University Professional Business secretary programme in order to give an opportunity to educate people, who cannot attend traditional studies. The terms for matriculation are the same as for traditional study, but students must have multimedia computer equipment. Communication between the teacher and students is implemented mainly over electronic mail (transmission of study units) and Virtual chat rooms. The examinations are taken at the institution.
- The Faculty of Economics which is the higher educational institution in Slovenia delivering the whole degree/accredited distance education programme with more than 1600 students enrolled. That programme is based on different types of study materials (print materials as prevailing with elements of on-line delivery) and various study support services, which are available to the DE students (also by vide Conferencing).
- The Faculty of Management Koper which provides in the virtual classroom one course on-line (academic year 2004/2005), developed for part-time students. It is meant for enriching traditional forms of education.

#### ***Overall supply-demand match with regard to e-learning in Slovenia***

The supply of e-learning courses/services in Slovenia is relatively modest. According to the results of RIS survey, conducted in 2003, only 10% of Slovenian companies have already used e-learning or distance learning for training and learning support for their staff. The RIS survey also indicates that 6.6% of the labour force in Slovenia are already using e-learning.

There are some non-formal online language and computer courses, which may have to be further developed and formalised to reach a wider audience. The development of online learning programmes related to formal education (leading to the attainment of educational degrees) would encourage the demand and thus new supply.

E-learning has no long tradition in Slovenia and therefore a lot has to be invested into promotion, both online any by using traditional media (TV, radio, press).

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