Output 1 SCORE2020: Needs analysis for support in Open Education and MOOCs

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Output 1. SCORE2020: Need analysis for support in MOOCs en Open Education
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Desktop research

Introduction
The SCORE2020 project deals with establishing a network of expertise centres for open education in Europe. As part of this work a needs analysis is conducted in several iterations. This deliverable reports results from the final iteration. A desktop research has been conducted between December 2014 and July 2015. Each partner organisation in the project had the task to contribute 5 reports on national, regional and international level that deal with the question of needs of stakeholders with regard to open education and/or MOOCs. This initial collection of reports has resulted in 35 reports. In a next step, the authors of this report have mapped the questions treated in the reports to a framework. This result has been discussed and enhanced during several project meetings of the project and has been extended with data from several surveys.

Framework
As a framework for the collection of the reports and the later analysis and synthesis we have come up with a basic framework that helps to differentiate on the one hand the different stakeholders on three levels (micro, meso, macro) and on the other hand the different topical areas of needs in the open education context. To differentiate the different stakeholders in open education we have started from a micro-educational context dealing with the design of learning materials and educational contexts. On this level on the one hand the learners and potential others users of open education are the focus of interest but also teachers and educational developers who might use open education.

<table>
<thead>
<tr>
<th>Level</th>
<th>Stakeholders</th>
<th>Educational</th>
<th>Economic</th>
<th>Technological</th>
<th>Legal</th>
<th>Quality Assurance</th>
<th>Dissemination</th>
<th>Strategic</th>
<th>Accreditation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macro</td>
<td>European policymakers</td>
<td>1, 8, 7</td>
<td>3</td>
<td>1, 9</td>
<td>8</td>
<td>8, 9</td>
<td>1</td>
<td>1, 9, 7</td>
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<td></td>
<td>Governments &amp; national policymakers</td>
<td>1, 8, 4, 5, 6, 7</td>
<td>25, 3, 4, 5, 7</td>
<td>3, 7</td>
<td>8, 3</td>
<td>8</td>
<td>4</td>
<td>1, 25, 3, 4, 7</td>
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<tr>
<td>Meso</td>
<td>Local and regional actors</td>
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<tr>
<td></td>
<td>Organisational policymakers</td>
<td>1, 8</td>
<td>9</td>
<td>4</td>
<td>5, 6, 7</td>
<td>8, 3</td>
<td>8</td>
<td>4</td>
<td>1, 25, 3, 4, 7</td>
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<tr>
<td>Micro</td>
<td>Teachers/Educational Developers</td>
<td>8, 9, 4, 5, 6, 7</td>
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<tr>
<td></td>
<td>Learners, participants and citizens</td>
<td>7</td>
<td>7</td>
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</table>

On the meso level we focus on actors who are not directly involved in the concrete educational situation but more with the surrounding organisational context. These are organisational policy-makers but also local and regional actors who influence educational innovation or funding structures for example. On the macro level we go even further away from the concrete educational context and target on support needs of national and governmental policymakers. Last but not least the European policymaking context is included in this level.
Micro level

Needs of Learners and citizens

Student Success Toolbox supports transitions from thinking about study to the first weeks to increase retention and completion rates particularly for flexible learners (undergraduate adult, part-time and online/distance students) as this is a significant problem in the Irish Higher Education sector.

To achieve this aim the tool box provides flexible learners with a suite of digital tools. These digital tools assist flexible learners by helping them assess their own readiness, provide feedback and lay the foundation for successful programme completion. The digital tools also assist teachers and institutions in providing personalised and strategically targeted feedback to potentially at risk students for learning in the digital world.

The Student Success Toolbox project is supported by the National Forum for Teaching and Learning Building Digital Capacity fund. It is a collaborative project involving Dublin City University, Sligo Institute of Technology, Maynooth University and Dundalk Institute of Technology.

http://studentsuccess.ie/

Needs of teachers and educational developers

Norway Opening Universities (NOU) publishes a biannual ICT Monitor (Ørnes et al. 2015). This is a national survey on the use of ICT in the Norwegian higher educational system. The survey documents both student and staff use of ICT for teaching and learning. The Monitor finds that, when designing courses, faculty need to know how to choose pedagogical models that are suited to both the subject matter and the students. They also need incentives for converting classroom courses into open online courses.

Tillväxtanalys (Growth Analysis, the Swedish Agency for Growth Policy Analysis) has issued a report on MOOCS (Tillväxtanalys 2014), which is an analysis of the situation in four countries: Great Britain, the United States, India, and China. In the context of this needs analysis, Great Britain and the United States are the most interesting.

From these two chapters, it is evident that there is a need for more knowledge on what works and more qualified instructional designers in order to choose suitable forms of interaction and design learning environments that are motivational and easy to master. There is also a need for better understanding and navigation of intellectual property laws.

Yuan et al (2014) highlight in their report that the pedagogy deployed (with reference to MOOCs), will need to be tailored to fit the different disciplines, subjects and markets that MOOCs occupy. This report also highlights some of the needs and choices that learners will need to consider before commencing a MOOC, for e.g. the support, cost and accreditation of their learning.

The paper of Holland et al (2014) makes mention to the goals and reasons institutions may have in offering MOOCs. If institutions intent for MOOCs to “extend the reach and access to education”: then to attract these new students, albeit those that are less educated or less advantaged, their courses will have to be tailored to accommodate individuals who are less self-directed. For this purpose they will
need to incorporate motivational features and address difference in participants’ preparation levels.

The paper of Macleod et al (2015) provides an account of the analysis conducted by Edinburgh University on who their MOOC learners are and the place MOOCs hold in their online learning environment. Data produced from their analysis showed that their MOOCs learners were global, with the majority being well-educated (c70% with a first or second degree) and in employment. Their primary reason for taking a MOOC was to “learn new things”. They found no overall gender difference in the participation of the sexes in their MOOCs, other than that gender participation was strongly influenced by subject matter. The University has a strong interest in both reaching and encouraging young, less advantaged individuals. To achieve this end using MOOCs, they recognise that they need to do two things, partner with others and design MOOCs to attract these potential students’ attention. Hence their Football MOOC, and their participation and partnerships with projects in Rwanda and Uruguay. The university also promotes their “Introduction to Philosophy” MOOC among teachers of pupils in schools whose students are less likely to study subjects like philosophy at higher level.

The report of Haggard et al (2013) provides a comprehensive review of literature (over 100 documents) relating to MOOCs, and open and distance learning. With reference to learners the report finds that literature concurs with the idea that the high dropout rates for MOOCs are irrelevant. Many reasons are presented to argue this point, ranging from there being no penalty for leaving a MOOC, to high dropout rates in many types of learning. The report also posts that learner analytics technology, comes to the fore with MOOCs: this may enable students, based on their profile, being served with engaging materials or receiving intervention to ensure course completion. The report also highlights the lack of essential “MOOCable” skills among learners. It suggests that online autonomy, group formation, and the inclusion/exclusion feelings among learners are insufficiently understood. It surmises that these skills are not being currently addressed by the primary and secondary education curricula.

**Meso level**

**Needs of organisational policymakers**

The Accreditation Organisation of the Netherlands and Flanders (NVAO) has formulated in 2014 a position statement to react on the emergence of MOOCs (NVAO, 2014) and the possible impact on higher education institutions. In the report the authors deal with the question of recognition and accreditation of activities in open online contexts. 5 scenarios are drafted with regards to internal and external quality assurance processes and possible accreditation options. Critical aspects for recognition in the Dutch-speaking context are especially certificate types and provided details (authority of institution, studyload, assessment and examination conditions) but in the case of blended and online programs also details about the mix of learning activities.

The NVAO (2014) also provides details about the legal foundations in the Netherlands to integrate curricular components of other institutions into the curriculum. About one third of a curriculum can consist of external resources and learning activities leaving freedom for reuse of open education assets and activities.

The Norwegian Ministry of Education and Research has published a government white paper: MOOCs for Norway — New digital learning methods in higher education (Norwegian Ministry of Education and
Research 2014). For the HEIs to benefit from MOOCs, the Commission points to a need to develop employee skills in the use of technology and to further develop the digital skills of students.

When it comes to intellectual property rights, they have found a need for the educational institutions to clarify appropriate agreements for both student and employee rights to personal intellectual property when developing MOOCs. The Commission further suggests that production of open digital learning resources be stimulated and that knowledge and procedures be improved regarding labelling of learning resources with conditions for use.

They also point to a need to develop schemes for assessing the qualifications of individuals who have completed MOOCs.

In its latest ICT Monitor (Ørnes et al. 2015), NOU finds that higher educational institutions need to find secure modes of online examination as well as appropriate forms of certification for passing and/or completing open online courses.

In its report on MOOCs (Tillväxtanalys 2014), the Swedish institute, Growth Analysis, has found that, as HEIs begin to develop and offer MOOCs, they need to offer advice to improve understanding and navigation of intellectual property laws. When recruiting, it is necessary to acquire qualified instructional designers who know how to design interaction that is inspiring and provides the necessary scaffolding for the students. If institutions are to give credit for the MOOCs offered, they also need to find efficient and effective modes of examination and reliable ways to identify students.

The Babson Group publishes an annual survey about online education in the United States (Allen and Seaman 2015). This survey identifies no specific needs, however, in looking at their findings for 2014, we see that a decreasing number of institutions are planning to offer MOOCs. Furthermore, the number of leaders who believe that MOOCs increase institution visibility or drive student recruitment are down. Half of the respondents disagree with the statement that MOOCs are a sustainable method of offering courses (up from 28.5% in 2013), and 37% of leaders now disagree with the statement that MOOCs are important for institutions to learn about online pedagogy (down from less than 20%).

Accordingly, there is a need to clarify business models for MOOCS and to investigate the effects of MOOCs on institution visibility and recruitment, in addition to examining any positive effects on pedagogy. A summary of the survey findings on MOOCs may be found in the Chronicle of Higher Education (Kolowich 2015).

Yuan et al (2014) in their report titled “Beyond MOOCs: Sustainable online learning in institutions” address the following issues:- how institutions should respond to MOOCs, the impact they have on teaching and learning environment, the technology choices and finally the strategic challenges and opportunities they provide. The report concludes that institutions need to develop a viable business model that not only includes open online learning, but is also attractive to students and fits the characteristics and needs of a particular institution. Institutions need to be aware of the different costs involved when developing a MOOC, and also to be clear as to whether their involvement in MOOCs is intended to be profitable, cost neutral, or philanthropic. MOOCs also offer institutions the opportunity to unbundle the teaching and assessment of their course. This will results in institutions needing to identify new ways of packaging, planning and organising their courses, services and learning support activities. MOOCs could perhaps be embedded into existing face to face courses, or exams could be set
by the higher institution with the responsibility of running and supervising them delegated to a third party, for e.g. testing centres.

In their paper titled “Revenue Vs Costs of MOOC Platforms. Discussion of Business Models for XMOOC Providers, Based on Empirical Findings and Experiences During Implementation of the Project IMOOCX”, Fischer et al (2014) discuss the business models of 4 MOOC platforms and give a detailed account of the cost model of developing a MOOC. They conclude that the financing of both the content and platform of a MOOC are challenging. For this reason they advocate projects that concentrate the efforts of different universities. They also highlight the legal and ethical issues associated with the selling of successful attendees’ data and credit bearing certificates. They stress the need to solve these legal issues and to grow public awareness of MOOCs. Cultural questions pertaining to European students are asked for example, would European students pay for services in a system that is mainly publicly funded and free. The overall conclusion is that a working business model for MOOCs is not easy, but is necessary for the future of (online) education.

The paper of Holland et al identified a variety of institutional goals for offering MOOCs, which fall into the following categories:

1. Extending the reach of the institution and access to education
2. Building and maintaining brand,
3. Improving economics by lowering costs or increasing revenues:
4. Improving educational outcomes for MOOC participants and on-campus students,
5. Innovation in teaching and learning and
6. Conducting research on teaching and learning.

The authors of this report strongly recommend that before embarking on a MOOC institutions need to carefully consider their goals, and specifically whether a MOOC is the right solution for ascertaining them. With respect to the above-mentioned goals: the following needs were highlighted. To broaden access, (specifically to those less educated) multiple channels of communication must be identified, for example, social media, high schools, employment agencies, or community organizations in both home (in this case US) and abroad.

Considering that MOOCs are revenue low and cost high, they need to prove that they can provide a service or solve a problem more effectively than existing alternatives. One possibility that institutions may consider, is in their use to eliminate the duplication of similar courses across different universities, albeit if licensing issues can be resolved, and the courses can be repeated without significant modifications. The authors also recommend that data collection protocols be devised prior and post to MOOC offering to ascertain if institutional objectives are/were met.

**Macro level**

**Needs of governments and national policymakers**

The white paper, MOOCS to Norway (Norwegian Ministry of Education and Research 2014), finds a need for one or more MOOC platforms adapted to local languages. The Commission also concludes that there
is a need for a national support unit to promote competence in relevant pedagogy and technology at HE institutions. In this regard, they have found a lack of research-based knowledge on both the use of technology in higher education and learning design.

In order for MOOCs to fulfil their potential, the Commission asserts the need for massive government support — in particular, to incorporate the use of MOOCs in lifelong learning to address competency shortages in working life and to support the use of MOOCs to speed up the learning process for high school students.

Findings from the latest ICT Monitor (Ørnes et al. 2015) provided by NOU show that governments and national policymakers need to find secure modes of online examination as well as suitable forms of certification for passing and/or completing open online courses.

In its report on MOOCs (Tillväxtanalys 2014), the Swedish institute, Growth Analysis, describes a need for national policymakers to take steps to ensure and certify the quality of MOOCs. MOOCs differ from both campus and online courses and, therefore, require a particular set of quality assurance criteria. As the institutions start to offer credit for MOOCs, it is necessary to determine the best ways to award credit for completing MOOC courses, in addition to finding efficient and effective modes of examination and reliable methods of identifying students.

In their paper Fischer et al (2014) also make specific reference to the needs of governments stating that that while free or open content is great for the education of society, it needs an investor. The paper argues that as Open Educational Resources are matters for society itself; governments should be involved in bring this content to the public in order to assist teaching and learning.

The report of Haggard et al (2013) provides a comprehensive review of literature (over 100 documents) relating to MOOCs, and open and distance learning. This report posits that the two most pressing needs for MOOCs “are the exploration of a viable business model and the accreditation of MOOC learning.” With reference to the first theme the report concludes that literature confirms the maturation of MOOCs but whether this has provided a viable business model is still not confirmed, but will shortly be tested with the launch of low-cost accredited degrees (based on MOOCs) by some US colleges. With reference to the second theme, accreditation, the report concludes that its discussion in literature is mostly related to US colleges and revenue generation. It surmises that this discussion will gain importance in the UK, when the models for assessing learning become more developed. With reference to UK policy makers this report recommends the following actions: 1. Research initiatives are needed to understand the “disruptive potential” MOOCs may have in higher education and to track their development. 2. Policy development opportunities exist in the areas of accreditation, pedagogical innovation and also the part MOOCs can play in Continuing Professional development (CPD).
Survey research

Introduction

The MOOC hype in the media might be over, but investment and uptake of MOOCs are increasing significantly worldwide. By the end of 2015, approximately 4,200 courses were offered by 500+ universities to 35 million students. This has increased by 2016 to 6,850 courses by over 700 universities to 58 million students (Class Central, 2016). However, these figures exclude many European MOOC offering as Class Central mainly list MOOC offering of the big (commercial) MOOC platforms. Many European universities have built an own platform or use a regional platform with a limited visibility. Most universities are not accepted by the big MOOC platforms in the US by lacking the reputation (in ranking) and finances to become a partner. As such, European efforts in MOOCs are less visible. Also the efforts of OpenEducationEuropa (MOOC Scoreboard) were incomplete and stopped in 2016.

Consequently, also research data about MOOC participants, needs in society, etc. are strongly biased towards US dominance and lack evidence what really is going on in Europe. As many European MOOC efforts are local, there is a lack of coherent research at a European level. Only recently some efforts at European scale were conducted (MOOCKnowledge, IPTS, BizMOOC project and by Jansen & Goes, 2016). These results indicate a distinct European uptake of MOOCs related to different needs.

MOOCs are becoming mainstream in Europe. Already four independent European studies show a strong MOOC involvement of Higher Education Institutions (HEIs).

![Figure 1: Institutional profile in their MOOC offering compared between that of US surveys (US 2013, US 2014 and US 2015), the EU surveys (EUA 2013, EU 2014), Muñoz et al. (IPTS 2015) and HOME survey (S 2015)](image)

At least about 40% of HEIs in Europe are having MOOCs or planning to develop MOOCs soon against 12% in the US (Allen & Seaman, 2016, see figure 1). Strongest involvement is seen in those regions with supportive policies and structures (e.g., Muñoz et al., 2016). Note that for a long period the main players in the European MOOC game derive from Western Europe (Dillenbourg, 2013), with Eastern European HEIs only just joining in. These recent surveys show that the uptake in Eastern Europe is catching up. I.e., these surveys indicate an expected increased uptake of MOOCs in Poland, the Czech Republic and in Lithuania at levels equal to Western Europe.

Most European universities are not accepted by the big MOOC platforms (of the US) by lacking the reputation (in ranking) and finances to become a partner. HEIs are therefore looking for alternatives by
developing their own MOOC platform mainly based on OpenedX and Moodle (e.g., UNED, Fachhochschule Lübeck), using a cloud solution like Canvas (e.g., Derby), starting a regional collaboration (EduOpen in Italy, CADUV in Czech Republic), etc.

Consequently, many HEIs in Europe that want to be involved in MOOCs cannot connect to big MOOC players and are potentially left behind or need to invest in platforms, tools and services themselves. As MOOCs are for massive audiences and relate to scalability – joint strategic partnerships are essential.

That the uptake of MOOCs in Europe is maturing at a much higher level compared to the US, is mainly an achievement of the current, partially language-bound platforms. However, many European HEIs that want to develop MOOCs report that (regional) support structures are missing and/or existing structures are unknown to them. The regional differences in languages, cultures and pedagogical approaches hinder the development and uptake of MOOCs in large parts of Europe. Hence, effective collaborations and scalable services for emerging MOOC provisions have to be made available at a cross-institutional or even cross-national level.

SCORE2020 and surveys on the needs for support services
SCORE2020 (Support Centres for Open education and MOOCS in different Regions of Europe 2020 project) is stimulating the set-up of regional expertise centres on open education and MOOCs with the support of the European partnership of OpenupEd experts. Those regional expertise centres can for example promote, stimulate and activate the development and the delivery of MOOCs and other modes of open education as well as use of MOOCs in their region. Together, the regional expertise centres can form a European partnership of players in the field of open, online and flexible education.

This section provides an overview of the results of several surveys done by the SCORE2020 project or in collaboration with OpenupEd and other projects that incorporated SCORE2020 questions in their surveys. The focus here is on the needs analysis for certain shared services and the preferences for support structures. The ongoing evolution of technology also introduces opportunities for opening up education by providing a range of online support services. In the context of MOOCs, with their massive dimension, the important digital innovation is related to the scalability of many educational services. MOOCs are also opening up a discussion around the unbundling of such services. MOOCs are seen as part of the unbundling and re-bundling of education – and as such the focus of this study. Unbundling means that parts of the process of education are not provided by the university but outsourced to specialised institutions and providers. MOOCs are accelerating the process by outsourcing of for example marketing, branding, ICT-platforms, exams, learning analytics services, etc.

This section summarises the results of four different surveys related to the needs and support structures

1. Survey amongst participants of four different (multiplier/trainings) events organised by SCORE2020 in 2016 and early 2017 (references as Survey_SCORE2020)
2. OpenupEd2016: Survey amongst OpenupEd partners about their strategy to collaborate on certain support services (Survey OpenupEd)
3. Survey on MOOC strategy HEIs held end 2016 amongst decision makers of HEIs (referenced as S2016)
4. S2015: Survey on MOOC strategy HEIs held end 2015 amongst decision makers of HEIs (referenced as S2015)
The table below summarises the main characteristics of those surveys:

<table>
<thead>
<tr>
<th>Survey</th>
<th>Time frame conducted</th>
<th>Methodology</th>
<th>Number of respondents</th>
<th>Characteristics respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCORE2020 events (Annex I)</td>
<td>October 2016-December 2016-January 2017-February 2017</td>
<td>Online questionnaire for those attending the event</td>
<td>56 respondents out of 169</td>
<td>Attendees events, mainly educationalists (59%), strategic (14%) and technologic (11%) experts</td>
</tr>
<tr>
<td>The future of OpenupEd – 4 year review (Annex II)</td>
<td>September 2016</td>
<td>Online questionnaire open to everyone</td>
<td>18 respondents</td>
<td>OpenupEd partners (78%), EADTU members not partner of OpenupEd (11%) and the ‘Outer world’ (11%)</td>
</tr>
<tr>
<td>Survey on MOOC strategy HEIs (Annex III)</td>
<td>2016</td>
<td>Online questionnaire widely distributed among Higher Education Institutions in Europe</td>
<td>102 respondents</td>
<td>Higher Education institutions:</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>• Type of institution (Finance): 7 private, 84 public, 11 mixed</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Type of institution (Education): 72 campus, 8 online, 21 mixed</td>
</tr>
<tr>
<td>Survey on MOOC strategy HEIs (Annex IV)</td>
<td>2015</td>
<td>Online questionnaire widely distributed among Higher Education Institutions in Europe</td>
<td>150 respondents</td>
<td>Higher Education institutions</td>
</tr>
</tbody>
</table>

Table 1: Characteristics of 4 surveys including SCORE2020 question on support services.

The overall results of those surveys are available in separate reports and papers. This paper summarises the most important issues related to the setup of (regional) support centres and as such focuses on the kind of services most like to collaborate on, the most likely organisation level for collaboration, etc. The results of these surveys on these questions are described in Annex I to IV respectively.

Overall Results four different surveys
This section summarises the main results of those four surveys related to the SCORE2020 project.
Most important Support services to collaborate on according to survey respondents

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<tbody>
<tr>
<td>design and development of MOOCs</td>
<td>support OpenupEd partners with the design and development of MOOCs (expert seminars, training, guidelines, etc.)</td>
<td>design and development of MOOC materials</td>
<td>development of MOOC (materials)</td>
</tr>
<tr>
<td>co-creating MOOCs with other organisations</td>
<td>promote the sharing and reuse of MOOCs</td>
<td>co-creating MOOCs with other institutions</td>
<td>design of MOOCs</td>
</tr>
<tr>
<td>a quality assurance framework</td>
<td>support the improvement of the quality of MOOCs by offering a quality assurance framework and tools to partners (quality label, institutional quality review)</td>
<td>sharing and re-using of (elements of) MOOCs</td>
<td>co-creating MOOCs with other institutions</td>
</tr>
<tr>
<td>development/use of a MOOC platform</td>
<td>develop a network of regional/national MOOC, or other educational support structures</td>
<td>use of MOOC platform</td>
<td>re-using elements (for instance OER, tests) from MOOCs</td>
</tr>
<tr>
<td>learning analytics</td>
<td>recognition of each other's MOOCs</td>
<td>co-creating cross-national educational programmes based on MOOCs with other institutions</td>
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</table>

Table 2: Summary of response of the most important services to collaborate on. Bold are those services with highest score in respective service.

The least likely services to collaborate on are translation services (Survey SCORE2020, S2015 and S2016), Support on licensing-copyright-copyleft (S2016), Authentication, proctoring and certification services (S2016), mediate in offering a platform for MOOCs already hosted by some HEIs (Survey OpenupEd) and selling MOOC-data (e.g., for recruitment, advertisements)

Outsourcing or collaboration

The 2015 survey (annex IV) repeated the same question on collaboration of services but in addition asked about the likeliness of services that institutions would outsource to other providers. In general the likeliness to outsource these services is much lower. Most likely services to be outsourced are related to
the use of a MOOC platform and to co-creating MOOCs with other institutions in the context of cross-national educational programmes based on MOOCs with other institutions.

Consequently, a corporate academic mix seems less likely to occur in Europe, and a cross-institutional/regional collaboration, with some government support, seems much more likely. The survey demonstrates that many European higher education institutions are willing to collaborate on scalable services in MOOC provision, and that a regional collaboration is much more likely then outsourcing services to corporates parties.

**How to organise geographically**

Survey SCORE2020 events (annex I) asked about the geographical level on which collaboration, on the scalable services mentioned above, could best be organised. According to 29% of the survey participants, collaboration should take place on a European level. In total, 22% of the participants believed that MOOC support should be dealt with by each organisation separately. 26% of the respondents thought it was best to collaborate on a regional level. Only (16%) would like to deal with MOOC support at a global level, and 7% of the survey participants agreed that MOOC support is best dealt with on a national level. However, asking at organisation structure, the majority of the respondents (62%) of the SCORE2020 survey (annex I) were of the opinion that MOOC support is best done in collaboration with a set of organisations. Most reasons in favour for cross-institutional collaboration are related to beneficiaries of sharing, the scalability needed and a joint quality assurance. It should also be concluded that the (dis)advantage of using MOOCs, both strategically and for teaching itself are not well-known and need more visibility (and research).

**MOOC support in the development and use/uptake from MOOCs**

- **is best dealt by a global market player**
- **is most effectively facilitated by a European MOOC consortium**
- **is best to be done by collaboration in a regional/national support centre**
- **can easily be provided by each HEI separately**

![Figure: Response of European HEIs to the question “MOOC support in the development and use/uptake from MOOCs...” from the 2016 survey (S2016, see annex III)](image)

The large 2016 survey amongst HEIs (annex 3) revealed that European HEIs are most likely to collaborate with in a regional or national support centre. Least likely for most European HEIs is the collaboration with a global market player.
Financial

MOOCs in general, are for free for every person enrolled. This raises the question who is paying for all the efforts in the development and operation of MOOCs. Increasingly, the big MOOC platform providers are offering additional to be paid for services to the participants, e.g. payment for a recognised credit. Some other providers advocate that the full course, including credit should be for free and as such must be financed by public means or private parties. The vast majority of the survey participants of the SCORE2020 survey (Annex I) believed that MOOC support should mainly be financed by public means, whereas 27% thought it should be financed by paid for services of the MOOC participants. In total, 11% of the survey respondents believed that MOOC support in the development and use/uptake from MOOCs should mainly be financed by private parties.

This confirms other studies that the social dimension of MOOCs is seen as an important feature in Europe (Jansen & Goes, 2016) and that this requires that MOOC investments, including the support structure, should be financed by public means. This is in contrast on how the big MOOC platform providers are now shifting towards financial models where less services are still offered for free and more-and-more (additional) services need to be paid for by MOOC participants. This observation requires a more fundamental discussion between European stakeholders on how they should use and finance MOOCs.

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Who should provide those support services?

The 2016 survey (annex III) asked if those support services should be provided by for profit organisations. Only 12% of HEIs strongly agreed or agreed with this. The majority of the respondents (56%) believed that support services in Europe(an regions) should not be provided by mainly for-profit organisations.

![Support services in Europe(an regions) should be mainly provided by for-profit organisations](image)

**Primary reasons for collaboration**

In both the SCORE2020 survey (annex I) and the HEI 2016 survey (annex III) respondents were asked what the primary reasons would be for their organisation to collaborate or why not to collaborate with others on MOOCs. The financial reasons as well as some competition reasons are seen both in favour or against collaboration on MOOCs. Most reasons in favour for cross-institutional collaboration are related to beneficiaries of sharing, the scalability needed and the need for a joint quality assurance framework. Some comments are related to not knowing the (dis)advantage of MOOCs both strategically and on teaching itself.

In het HEI 2016 survey (annex III) the reasons (not) to outsource are very diverse and sometimes oppose each other. For example “The primary reason for our HEI to outsource some MOOC services to others like private companies because they are more flexible” versus “We are more flexible in changing MOOCs and providing the support for teachers using MOOC with our own technical support.” For example “cost-effectiveness could be a possible reason to outsource, development work and tailoring to the needs of the institution could be either an incentive or a hindrance to outsourcing”. Most reasons mentioned by European HEIs (annex III) are not in favour for outsources. For example “Not. It is very complicated in cooperation with private companies to ensure the continuity of MOOCs”, or “The wish to be active players in the deal, that means we are ready to collaborate with other universities, as we already do, but not outsource to private parties (even due to some not-that-good experiences in the past)” and “Private companies are always a problem in Germany because of the strong data security.”
Conclusions

MOOC are becoming mainstream with end 2016 58 million participants in 6850 courses (Class Central, 2016). However, these figures exclude many European MOOC (list MOOC offering of the big MOOC platforms). Many European universities have built an own platform or use a regional platform with a limited visibility. Most universities are not accepted by the big MOOC platforms in the US by lacking the reputation (in ranking) and finances to become a partner.

At least about 45% of HEIs in Europe are having MOOCs or planning to develop MOOCs soon against 12% in the US. Strongest involvement is seen in those regions with supportive policies and structures. MOOC initiatives in central and eastern Europe are still in a vulnerable starting phase.

As many European Institution are (going to be) involved in MOOCs, the need for regional / cross-institutional collaboration schemes will increase. Especially as most of these HEIs cannot become partner of the big MOOC providers as they apply selective contracting policies to HEIs. As MOOCs are for massive audiences and relate to scalability – joint partnerships are essential. However, the regional differences in languages, cultures and pedagogical approaches might hinder an effective collaboration on scalable services in MOOC provision.

Surveys held in 2015 and 2016 amongst over 100-HEIs demonstrates that many European higher education institutions are willing to collaborate on scalable services in MOOC provision, and that a regional collaboration is much more likely that outsourcing services to commercial parties. Most important services HEIs want collaborate on are related to a) design and development of MOOCs; b) co-creating MOOCs with other organisations/institutions; c) services that facilitate and promote the sharing and resuse of MOOCs and d) support of a quality assurance framework. The survey results even shows that those services should not be provided by for-profit organisations. Most reasons in favour for cross-institutional collaboration are related to beneficiaries of sharing, the scalability needed and a joint quality assurance. Some comments are related to not knowing the (dis)advantage of MOOCs both strategically and on teaching itself.

In at least the European context the responsibility to stimulate the uptake of MOOCs should be shared between governmental agencies, academic and non-academic institutions, employers, and other stakeholders. Governments should support and scale up multi-stakeholder partnerships for efficiency reasons but also for the benefit of society as a whole. The recent UNESCO-COL publication (2016) is in this respect a call to re-vitalise the role MOOCs play in different society goals. Survey results presented strongly suggest that MOOC support is best done in collaboration with a set of organisations and should be mainly financed by public means (and not by financial contribution of MOOC-participants or by private partners).

In this we should embrace diversity – equity and increase accessibility. MOOC provision (and collaboration on shared services) should account for diverse languages, cultures, settings, pedagogies and technologies. As such the generic MOOC model needs to be re-engineered to allow for a broad spectrum of approaches and contexts. Policy and decision makers of all stakeholders involved need to be in a better position to understand the “MOOC phenomenon,” capitalise on the advantages of these large-scale courses and use them as a strategic opportunity to help to meet local needs and develop related capacities.
Annex I: Summary Survey amongst participants SCORE2020 events

Focus survey
For four of the SCORE2020 events (Rome, Maastricht, Madrid, Ljubljana) the same standardised online survey was used to evaluate the events and to ask the participants’ opinion about MOOC support services and their collaboration with other organisations, concerning MOOCs.

Methodology
After the SCORE2020 events, all attendees of the events in Rome, Maastricht, Madrid and Ljubljana received an email in order to thank them for their attendance and with request to fill out a survey about the event. A printout of the four questionnaires is also available as pdf and attached to this overall evaluation report. The surveys consisted out of ten multiple choice questions and four open questions.

Survey respondents
From the 169 attendees 33% (56) anonymously filled out the survey. The vast majority of the survey participants indicated to be educational experts (59%). The second and third largest groups consisted of strategic (14%) and technologic (11%) experts. The other respondents were experts in quality assurance, economy, accreditation/ recognition or they specified other topics of expertise: Academic library, accessibility, research, policy and strategy.

Results
This section discusses survey results about MOOC support in the development and use/uptake of MOOCs. The complete evaluation report of those four events is available as Output 3.

The scalability of MOOCs is a challenge for many institutions. The scale problem does not only relate to the amount of participants but also possible economies of scale. Higher Education Institutions chose different strategies to approach the scalability problem. HEI’s are sometimes developing MOOCs on their own platforms, but most of the time they seek collaboration at a larger scale. Possible services on which organisations could collaborate are:

1. Design and development of MOOCs (materials, scalable learning strategies, etc.)
2. Co-creating MOOCs with other organisations
3. Sharing and reusing of (elements of) MOOCs
4. Support on licensing copy right copy left
5. Quality assurance framework
6. Authentication, assessment, proctoring and certification services
7. Recognition of each other's MOOCs
8. Co-creating cross organisational programmes (e.g., micromasters, nanodegrees)
9. Learning Analytics
10. Translation services
11. Collective research, e.g., by pre/post surveys
12. Promoting MOOC offerings on a (worldwide) portal
13. Scalable communication means including attracting massive amounts of participants
14. Marketing and branding of MOOC offerings
15. Development/use of a MOOC platform
16. Additional support services for MOOC participants
Respondents were asked to state the most important support services on a personal level and for their organisations. They had to choose the level of importance of the sixteen support services listed above. Figure I1 and I3 present the survey results regarding these support services.

![Bar chart showing support services](image)

**Figure I1: What kind of support services are the most important for yourself?**

When looking at the support services that were most important for the respondents in figure 4a, the survey participants believed that design and development of MOOCs (1) was the most important service for themselves (i.e. over 80% finds this support service very important). Other support services that were also seen as important (i.e., more than 66% of respondents stated that they were very important) are co-creating MOOCs with other organisations (2), sharing and reusing of (elements of) MOOCs (3), quality assurance framework (5), recognition of each other's MOOCs (7), learning analytics (9) and the development/use of a MOOC platform (15). Figure I2 presents the average score and standard deviation by attributing the values 0 to 5 to Not important to Very Important. These support the findings based on figure I1.
The support service that was perceived as least important were translation services (10). In total, 71% of the respondents believed this service was either not/slightly important or they were neutral. Other services that were reviewed as not that important by the survey participants included support on co-creating cross organisational programmes (e.g., micromasters, nanodegrees) (8) and marketing and branding of MOOC offerings (14).

In addition, participants were asked to list support services that are most important for their organisation (figure I3 and I4). According to 39% of the survey participants, a quality assurance framework (5) and authentication, assessment, proctoring and certification services (6) were perceived as very important to their institution. Other support services that were again generally recognised as (>72%) very important or important for the organisation included: design and development of MOOCs (1), co-creating MOOCs with other organisations (2) and learning analytics (9).
No large differences between the personal and organisational perspectives were observed. Only the service on authentication, assessment, proctoring and certification services (6) is seen as somewhat more important for the organisational perspective compared to personal level. Note that the same persons responded to both questions, but some of them we not in the position to state the overall institutional perspective clearly as their role in the organisation is limited to for example educational perspective.
The majority of the respondents (62%) felt that the MOOC support in the development and use/uptake from MOOCs should be mainly financed by public means. This confirms other studies that the social dimension of MOOCs is seen as an important feature in Europe (Jansen & Goes, 2016) and that this requires that MOOC investments, including the support structure, should be financed by public means. This is in contrast on how the big MOOC platform providers are now shifting towards financial models where less services are still offered for free and more-and-more (additional) services need to be paid for by MOOC participants. This observation requires a more fundamental discussion between European stakeholders on how they should use and finance MOOCs.

Again the majority of the respondents (62%) were of the opinion that MOOC support is best done in collaboration with a set of organisations, although their preferences on the geographical level were not clear other that it should not be organised on a national level. Most reasons in favour for cross-institutional collaboration are related to beneficiaries of sharing, the scalability needed and a joint quality assurance. It should also be concluded that the (dis)advantage of using MOOCs, both strategically and for teaching itself are not well-known and need more visibility (and research).

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Annex II: Summary research amongst OpenupEd stakeholders

Focus of this research

OpenupEd was launched in April 2013. After almost four years of operation and growth the OpenupEd steering committee in close collaboration with SCORE2020 project, took the initiative to review the role and positioning of OpenupEd in relation to other MOOC (service) providers and political contextual changes to set strategy for the future.

An overview of contextual changes related to OpenupEd:

1. OpenupEd was the main MOOC portal in 2013 offering 40 of the 83 MOOCs in Europe. This has drastically changed. In Europe OpenEducationEuropa tried to be the main portal for OER, open courses and MOOCs. However, the failed to do so and they will stop their efforts. Worldwide ClassCentral and MOOClist are leading MOOC portals also offering editorial news.

2. The main MOOC platform providers are still Coursera, edX and Udacity. New MOOC platform providers are since 2013 in Europe are MiriadaX, FutureLearn and Iversity. The later had some financial problems this year but is now supported by Holzbrinck Publishing. In China and India amongst other countries MOOC are booming. Only in France a national platform is operational (FUN).

3. Investments in these main MOOC platform providers are between 10 to over 100 million dollars. However, most platforms still are struggling with their business models and look for an extension of their activities, e.g. to the re-use of MOOCs in university-business collaborations and to the certification for MOOCs (incl. mini-masters). Platforms deliver (pedagogical) services to their members and opportunities for collaboration. Business models are related to quality brand.

4. OpenupEd does not offer a MOOC platform because most of OpenupEd partners are operating successfully with their own platforms. So most members of EADTU have their own MOOC platform although some are involved the big MOOC platforms as well. The UKOU is owner of Futurelearn but offer self-paced MOOC through OpenLearn as well.

5. OpenupEd was the first one to include self-paced MOOCs. This initially let to exclusion of some OpenupEd MOOC in European Scoreboard of OpenEducationEuropa. It took until 2015 for the main MOOC providers to widely starting to offer them as well.

6. OpenupEd was the first one to offer optionally formal credits for its MOOCs already since the start. Now this is widely sees as a must (not only for participants but also as part of business model). More and more MOOC providers now offer coherent MOOC offering wrapped in for example nano degrees, micro masters, etc. as part of development of business models for MOOCs Keys issue of MOOCs are related to assessment and certification. More and more MOOC providers now offer coherent MOOC offerings wrapped in for example nano-degrees, micro-masters, etc.

7. Several European projects on MOOCs (already about 20 funded projects) are set up and lead to partial results, which can be useful for some of the platforms and to higher education and policy makers. EADTU/OpenupEd has led the HOME and the SCORE2020 projects, and is involved in MOOC projects llike ECO, BizMOOC and MOONLITE. This has led to a broader awareness raising on MOOCs and a proposal for supporting the development, delivery and use of MOOCs by institutional/regional/national support centers in all European countries.

8. There is strong evidence that many European higher education institutions at some stage want
to develop MOOCs. Already four independent studies shows that in Europe the number of HEIs that have a MOOC or is planning to add MOOC offering has increased to over 45% of HEIs, while it is stable at 12-13% in the US. for the last three years. However, only few institutions have access to current US and even European platforms as they lack the worldwide reputation (e.g. ranking) needed to participate.

9. MOOCs are originally seen an instrument to open quality education for all. However, all big MOOC providers are now focussing on using MOOCs to CPD and training of employees. However, in outer continents (especially in Asia and for some part Africa) using MOOC to educate the many is booming.

Methodology survey
This contextual analyses was followed by a survey. This survey was developed by Martin Weller and the EADTU office also on behalf of SCORE2020 related to support services. The Survey ‘The future of OpenupEd – 4 year review’ is available in Google form. The main aim is to get input about the present and possible future profile of OpenupEd. To this end the questionnaire has three section with in total six questions.

1. Main audiences for OpenupEd partnership
2. Services to be offered by OpenupEd (partners)
3. Aim of OpenupEd

Each section shortly describes the present situation of OpenupEd and then asks about the opinion of the respondents on possible choices to make on an updated profile of OpenupEd. Here we only focus on the service section in relation to SCORE2020

Survey respondents
Early September 2016 the survey was distributed amongst

a) OpenupEd partners (the contact persons)
b) General Assembly of EADTU
c) Social media (Facebook and Twitter)

In this way we could distinct between priorities of present OpenupEd partners, those of EADTU members not yet partner of OpenupEd and the ”outer world” with potential new partners. However, the response outside OpenupEd partnership was too low.

The survey was closed on 20 September 2016, with in total 18 respondents

OpenupEd partners 14
EADTU members not (yet) partner 2
‘Outer world’ 2

Note that the respondents are mainly OpenupEd partners (78%) – and that about 80% of present OpenupEd partners replied.

Main results in context of SCORE2020
In the section Services to be offered by OpenupEd (partners) we asked about “How important are the
following services (that could be) offered by OpenupEd and its partners?”

Figure 1 shows the results on this section.

Figure 1: the importance of offering possible services by OpenupEd and its partners

The numbers are representing the following possibilities on which OpenupEd could offer services.

1. foster MOOC leadership by an international partnership and thereby strengthen each regional position
2. develop a network of regional/national MOOC, or other educational support structures
3. provide a European voice for MOOCs in global context
4. support OpenupEd partners with the design and development of MOOCs (expert seminars, training, guidelines, etc.)
5. create a one stop set of services for all organisations wishing to create MOOCs (services by OpenupEd partners to all organisations)
6. support the improvement of the quality of MOOCs by offering a quality assurance framework and tools to partners (quality label, institutional quality review)
7. promote the sharing and reuse of MOOCs
8. offer a MOOC portal with the MOOC offerings of OpenupEd partners
9. activate a joint marketing approach aiming at an international coverage and up-take of OpenupEd MOOCs with regional support of OpenupEd and civil society partners
10. mediate in offering a platform for MOOCs already hosted by OpenupEd partners
11. provide a free hosted platform for OpenupEd MOOCs where desired
12. develop scalable services to reduce development and delivery costs of MOOCs (e.g., MOOC templates/models, monitor/evaluation instruments, learning analytics, proctoring, exam centres, etc.)
13. establish networks to increase the (business/society) impact of OpenupEd MOOCs offering; i.e. with the support of partners develop services that encourage the up-take of MOOCs by citizens; stimulate the uptake of MOOCs by professionals and enterprises
14. stimulate the offering of new and flexible learning paths by using MOOCs as building blocks in accredited short learning and degree programs]
15. evaluate MOOC offering and stimulate collective research
16. generate additional (project) funding

Hence, a great number of respondents find the following services very important:

3: provide a European voice for MOOCs in global context
6: support the improvement of the quality of MOOCs by offering a quality assurance framework and tools to partners (quality label, institutional quality review)
7: promote the sharing and reuse of MOOCs
16: generate additional (project) funding

These services are already provided momentarily with exception of ‘promoting the sharing and reuse of MOOCs’ (3). This service is found (very) important by all respondents.

In addition, the service ‘support OpenupEd partners with the design and development of MOOCs (expert seminars, training, guidelines, etc.)’ (4) is also seen by all respondents as very important or important. The service “develop a network of regional/national MOOC, or other educational support structures” (2) is seen by all but one as very important and important. These services are also not yet provided by OpenupEd.

Note (that) important are the services related to ‘mediate in offering a platform for MOOCs already hosted by OpenupEd partners’ (10) and ‘provide a free hosted platform for OpenupEd MOOCs where desired’ (11). This is somewhat surprising as the most leading question from institutions that want to become OpenupEd partner is about hosting platform(s). In this sense the survey might be strongly biased as the number of respondents from outside OpenupEd partners is just 22% - and 78% already has their own MOOC platform.

Comments made in the open question are

- Promotion and marketing as well as access to funding opportunities are the most important.
- 5G connected devices will offer a wider range of new global Internet users (2 billion plus new users) via Smart Phone, so consider how MOOCs are seen on Smart Phones.
- Creating alternative platforms on which existing MOOCs might be hosted could result in challenges and risks around versions which could be costly to accommodate.
- Since our approaches to MOOCs should be closer as time and experiences go by, we should reinforce our networks, lower our costs and increase our reach.
- To ‘MOOC or not to MOOC’ is a choice of the EADTU member (and also the choice of platform). We need support in networking, quality assurance, templates, etc.
- One service could be a model like Wikiwijs. Offer a platform for institutions who want to publish MOOCs but do not have a platform for this, but distinguish these MOOCs from the ones that apply to the quality criteria (quality marks, "keurmerk"). These institutions can apply for the other services, thereby improving their offerings and raising the quality as a whole.
Additional survey on MOOC platform services amongst OpenupEd partners
An additional survey on “MOOC platform and other services” was conducted amongst OpenupEd partners. The main aim is to have an inventory about the MOOC platforms OpenupEd partners are using and if they are willing to make those platforms available to others. Some additional questions are asked about other services that might offered as part of OpenupEd. This survey consists of 8 questions. During July and August 2016 the survey was distributed amongst OpenupEd partners only. By the end of August we had 11 respondents out of 15 active OpenupEd partners.

In context of SCORE2020 the last three questions are relevant.

Question 6: EADTU office regularly gets requests for MOOC support, most often related to the use or hosting of a MOOC platform. Is your institution willing to offer your MOOC platform to others? (One option only)

![Chart: Is your institution willing to offer your MOOC platforms to others?]

The majority of the respondents need further discussion before deciding on this topic. Four partners are willing to offer their platforms to every organisation. To this end OpenupEd decided to offer multiple MOOC platforms to other organisations.

Question 7: What kind of MOOC support services are you already offering to your staff at your institution? (Multiple options can be selected).
Eight partners support the design of MOOCs (pedagogical support), five partners support audio-visual services, seven support organisational/delivery services and two partners support other services (one partner provides course hosting for commercial partners and for NGOs and the other one states that the services are available but for the moment there is no Institutional strategy for MOOC services).

Question 8: Are you willing to make these services available to third parties? (One option only)

The majority of the respondents need further discussion before deciding on this topic. Four partners are willing to offer their platforms to every organisation.
Annex III: Summary Survey on MOOC strategy HEIs held end 2016

Focus survey
This survey focuses on strategies of higher education institutions (HEIs) regarding MOOCs (Massive Open Online Courses | http://bit.ly/1DrMxXy ). The main purpose is to address the possible differences and similarities between HEIs in different regions in their goals and the strategic choices to be or not to be involved in MOOCs. For this reason some questions are identical to the U.S. surveys by Allen and Seaman conducted last years (see e.g., their report of 2014 http://bit.ly/16rUSvr).

Methodology
The survey is largely a repetition of the survey of the last two years. The initial aim of the survey in 2014 was to determine the strategies of HEI on MOOCs and their reasons (not) to be involved and to compare the strategy of European HEIs with US. In 2015, the survey was repeated again but extended to start a comparable study between countries in Europe (next to comparison to US) and to determine the reasons and subjects on cross-institutional collaboration. These two studies led to the identification of a distinct European response on MOOCs. It not only demonstrated a much higher level of involvement (compared to US) but also that these differences are related to the social dimension of the European educational system along with a multi-stakeholder involvement.

To this end the 2014-2015 survey is repeated again in 2016. Next to determine possible changes over the years, the present survey in addition focusses on getting more details about possible collaboration models and characteristics of the social dimension of MOOC involvement of European HEIs.

Survey respondents
101 HEIs responded characterised as follows

- Type of institution (Finance): 7 private, 84 public, 11 mixed
- Type of institution (Education): 72 campus, 8 online, 21 mixed
- MOOC Offering: 45 has MOOC offering, 22 not decided, 25 planning, 9 adding
- MOOC platform use (optional): 17 own region, 23 big MOOC, 8 own dedicated, 19 open source

Results in context of SCORE2020
Analysis and results of this survey will be reported in June 2016 by EADTU. Here some preliminary results in context of SCORE2020 project are presented for the need analysis of that project.

Collaboration on support services
This 2016 survey had a section on collaboration on MOOC offerings using the following question:

**Below is a list of areas your institution may want to collaborate with other HE institutions. How likely would your institution collaborate on these areas?**

1. Design and development of MOOC materials
2. Co-creating MOOCs with other institutions
3. Sharing and re-using of (elements of) MOOCs
4. Support on licensing-copyright-copyleft
5. Quality assurance framework
6. Authentication, proctoring and certification services  
7. Recognition of each other’s MOOCs  
8. Co-creating cross institutional programmes (e.g., micromasters, nanodegrees)  
9. Learning Analytics  
10. Translation services  
11. Collective research, e.g., by pre-/post surveys  
12. Promoting MOOC offerings on a (worldwide) portal  
13. Marketing and branding of MOOC offerings  
14. Development/use of a MOOC platform  
15. Additional support services for MOOC participants  

Note that here 15 different support services are listed, very similar to the 16 used in the SCORE2020 events survey (Annex I) and the OpenupEd survey (Annex II). This is a condensed list of services already conducted in the 2015 survey that listed 24 possible services for collaboration/outsourcing (see Annex IV). 

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**Results Question: MOOC support in the development and use/uptake from MOOCs**  
Thus survey also asked about if MOOC support in the development and use/uptake from MOOCs  

- can easily be provided by each HEI separately  
- is best to be done by collaboration in a regional/national support centre  
- is most effectively facilitated by a European MOOC consortium  
- is best dealt by a global market player
This 2016 survey amongst HEIs revealed that European HEIs are most likely to collaborate with in a regional or national support centre. Least likely for most European HEIs is the collaboration with a global market player.

**MOOC support in the development and use/uptake from MOOCs**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
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<td>is best dealt by a global market player</td>
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<td>is most effectively facilitated by a European MOOC consortium</td>
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<td>can easily be provided by each HEI separately</td>
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Support services in Europe(an regions) should be mainly provided by for-profit organisations

This 2016 survey also asked if those support services should be provided by for profit organisations. Only 12% of HEIs strongly agreed or agreed with this. The majority of the respondents (56%) believed that support services in Europe(an regions) should not be provided by mainly for-profit organisations.
Reasons (not) to collaborate

Results Open Question: What would be the primary reasons for your HEI (not) to collaborate with others on MOOCs?

FINANCIAL
- decrease of costs, fostering best practices, learning from other realities
- Financial
- Time, interests and money
- Cost sharing issues - would need clarity on who pays for what and how revenues could be shared.
- Lack of funding/resources, operating in a small country/language area
- Lack of institutional funding
- The lack of practice and resources.
- If it interfered with our business model or offered poor ROI
- Need recourses to collaborate with other HE institutions.

COMPETITION vs COLLABORATION
- together we are stronger
- Foster cooperation
- Cross-accreditation
- we are too small of our own
- the need for international links in this innovative area of teaching
- economic reason and success student support
- Economic problems
- Of course collaboration is good. Imagine not wanting to collaborate?
- I see that there might be conflict of interests since different institutions might have different values
- we already collaborate with 15+ institutions in eduopen.org
- Not: having different goals so that collaboration becomes hard. However, we are looking into the possibilities to collaborate with different HEI's for the development of MOOCs/Online Education. However, because of the different scope we only seek collaboration with other universities of applied sciences.
- no reason to not collaborate
- there are no such reasons
- It's easier to work with others than alone
- The perceived competition in the HE market for a smaller number of PG students.
- competition between higher education institutions
- credit; existing collaborations; subject expertise

SHARE
- the other institution's expertise in MOOC area, technical support, experience
- experience sharing
- good courses
- share experience, content and production effort/funding
- Share experiences in terms of cost effective learning processes for faculty, high quality student activity, assessment and learning objects.
- To share experience
- knowledge and expertise sharing
- Having a shared topic of interest with complimentary expertise
Knowledge sharing
common objective or problems
Recognition, sharing
Knowledge and experience transfer, about processes, related to MOOCs and beyond MOOCs (e.g. generally distance education, multimedia content creation, organization)
We have already collaborated with 6 other HEIs in the delivery of a MOOC. We Collaboration provided the opportunity to share knowledge around MOOC delivery and design as well as giving us access to faculty with expert content knowledge not available within our own institution.
Research and development, increasing visibility.
the awareness of not having sufficient resources to provide wide range of online training
Experience

CREATE SCALE
Sharing our experiences, learning what others are doing, increase our visibility in international settings
An EU-level approach could make the difference on the global market.
We are not able to provide alone many MOOCs. Is necessary to cooperate for create an interesting offer to students.
Internationalisation, development of pedagogical models, enrolling students from other countries
We believe that jointly we can reach larger target groups - stronger together :-)
Extended course selection for students
visibility reasons
Promoting MOOCs

QUALITY ENHANCEMENT
The primary reason for our HEI to collaborate is realization innovative approaches in teacher education as soon as possible
The main reason is to ensure high quality education in an international environment.
The professional relevance and the quality of the MOOC
To achieve higher quality of learning materials in MOOCs
The chance to poll resources to create quality offerings
Quality assurance framework
To help establish a consortium of innovative MOOC using universities on our preferred platform.
Increasing the quantity and quality of the course portfolio for our students

LACK OF KNOWLEDGE ABOUT POSSIBILITIES/ADVANTAGES
We are not used to collaborate with other institutions, with regard to education and teaching, and therefore we might not realise the possibilities.
my institution (main decision makers) lack information about MOOCs
MOOCs are more of a bottom-up initiative here at present, ie low-budget courses on the free Canvas.net platform. We are just starting with a handful of pilot courses that are still in planning.
I cannot imagine one, we do not use MOOCs for collaboration, we use instead open professional collaboration approach, not specific area.
It’s too complex
Lack of structure at the organisational level and financing.
I do not have an answer. I think for some reason, did not exist.
• copyright and legal issues
• copyright
• if it’s too complicated, needs too much time

JOINT DEVELOPMENT
• Development of online teaching methods
• Development of MOOC platform
• Development of researches
• Research collaborations can and will lead to possible shared MOOCs.
• Co-creating cross institutional programmes
• Sharing MOOC's creation process with other.
• Co-creation MOOCs
• Creation of "joint degree" programmes.
• applied research

OTHER
• Maybe a similar program
• We are the only primary users, so currently only trying MOOCs.
• I am reading about MOOCs and I am interested in MOOCs.
• Specific of institution
• question for the school management
• Efficiency
• Finally it depends. It could be strategic (HEI in another region of the world or in another discipline.
• General objectives and interest on the topic.
• we collaborate directly with teachers, not at the institutional level

Reasons (not) to outsource
Results Question: What would be the primary reasons for your HEI (not) to outsource some MOOC services to others like private companies?

Open Question: Outsourcing of services to other (public and/or private) providers

• The primary reason for our HEI to outsource some MOOC services to others like private companies because they are more flexible
• We don't have a policy on this issue.
• we are in start position
• Development of online educational infrastructure
• Funding
• technical solutions, multimedia support, experience
• not likely
• Resources
• We don’t really see the infrastructure for this, yet.
• experience
• We are more flexible in changing MOOCs and providing the support for techers using MOOC with our own technical support.
• attraction of new students
• Cost-effectiveness could be a possible reason to outsource, development work and tailoring to
the needs of the institution could be either an incentive or a hindrance to outsourcing

- Not. It is very complicated in cooperation with private companies to ensure the continuity of MOOCs
- If there was something we could not do ourselves and we could save money/time in doing so.
- social partners
- I am not qualified to answer
- No reasons.
- More practical trainings about technology-enabled learning
- none
- depends on the cost
- We are the only primary users, so currently only trying MOOCs.
- Remain in control of quality
- being public uni cannot go to private
- Money
- Specific of institution
- no answer
- question for the school management
- In favour in order to get incomes or resources.
- none
- visibility reasons
- Sound learning outcomes and good salary for teachers.
- Only for limited amount of internal skills or capabilities
- We can outsource some services, such as production of high tech materials, to the others but in general this is sort of cultural characteristics that our HEI would not like to outsource some other major services, such as evaluation, administrative processes, course or program design. One of the other reason not to outsource is related to the costs.
- members in federation are public HE institutions and we want to promote the public production for HE
- Quality of services
- Only for technical hosting of our MOOC platform
- We want to have own hands on
- Tu Delft offers a great new media centre for production and experience.
- We are a big institution so we can keep most services (and competences) in-house.
- We have a culture of doing things ourselves
- Multimedia
- saves time and expenses and tightens content quality
- Quality and the fact that producing them we learn and make research as well
- there are no such reasons
- The university of Bergen sees this as an inhouse operation the same way on campus education is.
- Collective research
- proctoring services can be easily outsourced should some legal barriers be overcome
- Currently, Uninettuno approach in distance learning provision it to not outsource primary services to private companies or external players.
- The costs
- We want control
- partly yes, when it is the best way to invest resources
- to bring social partners
- autonomous
- Economical benefits
- Quality assurance, or lack of.
- Would not outsource for potential Quality control and Assurance issues
- I think this would only apply for some more or less marketing moocs, but such an outsourcing will not happen for various reasons.
- We might outsource to a MOOC provider, but are unlikely to outsource in other ways
- Expertise, division of labour
- We cannot do all inside our university
- Copyright, teachers distrust.
- Funding
- Moving to cloud finance
- Not many MOOCs will be developed, therefore there is a substantial support within the University, being able to develop and deliver.
- The university as a LMS which covers the offering of MOOCs
- Lack or human resources or expertise in a given area
- No ideas
- We are already outsourcing MOOC services to the network EDUOPEN
- The wish to be active players in the deal, that means we are ready to collaborate with other universities, as we already do, but not outsource to private parties (even due to some non good experiences in the past)
- Inability to respond to all internal requests for MOOC development support.
- Cost efficiencies
- Need support resources
- We are already using YouTube for video streaming, but we don’t need other MOOC platforms. Private companies are always a problem in Germany because of the strong data security.
- Too costly maybe? but we do outsource some MOOC services to a private company (unow)
- No funding available for outsourcing
- We outsource translation. Outsourcing other services is difficult because we want to maintain full control and flexibility to be able to use MOOCs and MOOCs data for research
- To experiment with new methods
- Cost-efficiency, improved quality, increased compliance among the service provider etc.
- UAlberta does outsource to nonprofit Onlea for course production. Most likely would not outsource pedagogical choices in content as that is seen as the realm of our professoriate to determine.
- If providers like NHS England want to run our MOOCs for their own cohorts
- Clear need
- Cost
- Uncertainty about their value and the future sustainability of such a solution. It is being considered, but with great caution.
- Give away the control about learning processes of our students
Annex IV: Summary Survey on MOOC strategy HEIs held end 2015

Focus survey
This MOOC survey focuses on the MOOC strategy of higher education institutions (HEIs) mainly in Europe and Canada. The survey was conducted in the fourth quarter of 2015. The results of this survey are compared to a similar study the year before as published in Jansen and Schuwer (2015). The results of the 2014 surveys are published as an EADTU report and as an IRRODL paper. The results of the 2015 survey is available as an overall report as well as some country reports.

Methodology
An online survey instrument was used to collect data from HEIs mainly from Europe and French Canada. This survey was conducted during the fourth quarter of 2015 and was largely a repetition of the survey from 2014 (Jansen & Schuwer, 2015). In order to have a base to compare the results of this study with the Babson Group’s results (Allen & Seaman 2014, 2015, 2016), quite a number of questions were adapted from the instrument used by the Babson Group. Most questions were kept identical to the 2014 survey. Some additional questions related to SCORE2020 were developed during the summer of 2015 and tested among partners. After finalising the English version (see Annex 1), the survey was translated into French and Turkish. A Google form offering those three languages was open from 15th October to 4th January 2016. Higher education institutions were in general approached by personal contact and by the use of newsletters and social media to complete the questionnaire.

Response
In total 168 institutions responded out of 30 countries. This was corrected to a) include only HEIs which are part of the formal HE structure of the country of origin and b) only one response per institution, i.e. select the one most representative to answer the questions. So the response in total is 150 HEIs out of 24 countries. Next to the overall report (Jansen & Goes, 2016), several country reports are produced as well.

Results in context of SCORE2020
These reports, and other surveys, indicate that the European response is very different compared to US and the main reasons seems related to social (inclusion) dimensions. While in the U.S. the number of HEIs that have a MOOC or is planning to add MOOC offering is stable at 12-13% for the last three years, European HEIs seem much more involved with in general over 45% of HEIs (planning to) offer MOOCs (see figure 1 in Introduction).

Moreover, it seems that European HEIs are clearly confident regarding MOOC development and implementation. The European institutions are having a more positive attitude towards MOOCs and those offering MOOCs have positive experiences. For example, more than half of European HEIs already state that some/most objectives are already met. Moreover, while in the U.S. surveys, the opinions are mostly neutral or disagree, both the 2014 and 2015 (EU) surveys shows that a large majority of the respondents agree that “MOOCs are important to learn about online pedagogy”. This is confirmed when comparing the primary objectives of the HEIs for offering a MOOCs. In all surveys, the objectives related to finance (explore cost reduction, generate income) and scalability dimensions of MOOCs are not regarded as primary objectives. The present survey confirms that in Europe using MOOCs for student recruitment is not considered as important as in U.S., but rather to reach new students and creating
flexible learning opportunities (for those new students).

Related to the macro drivers the results of 2015 confirm those of 2014 (Janssen & Schuwer, 2015). In these surveys both ‘Improving the quality of learning’ and ‘Need for (e-)skills and jobs’ are considered the most relevant. ‘Reduce the costs of HE’ and ‘New method in big business’ are seen as less relevant.

**Collaboration or outsourcing**

This survey added two new questions added by the SCORE2020 project. (1) what the primary reasons for your institution are to collaborate with others on MOOCs and (2) we asked what kind of services institutions would be willing to outsource to (public and/or private) providers. Both questions are supported by a common list of 24 possible services:

1. Selling MOOC-data (e.g., for recruitment, advertisements)
2. Marketing MOOC offer
3. Branding of a collective (best research universities, etc.)
4. Networks/communities on MOOCs
5. Co-creating cross-national educational programmes based on MOOCs with other institutions
6. Co-creating MOOCs with other institutions
7. Using MOOCs from other institutions in your own institution
8. Support services for participants
9. Learning Analytics
10. Assessment – tests – quizzes
11. Licencing – copyright - copyleft
12. Re-using elements (for instance OER, tests) from MOOCs
13. Development of MOOC (materials)
14. Design of MOOCs
15. Evaluation (pre-/posts surveys)
16. Translation services
17. Follow-up materials to be paid for (e-documents, software, e-books)
18. Tailored (paid for) follow-up courses
19. Using MOOCs as crowdsourcing to answer research questions
20. New educational services (scalable)
21. Authentication services
22. Certification services
23. Development of MOOC platform
24. Use of MOOC platform

Figure IV.1 presents the preliminary results of this 2015 survey on the likeliness of areas on which institutions would collaborate with other HE institutions. It is general observed that European HEIS are very much willing to collaborate on services like co-creating MOOCs with other institutions, re-using elements from MOOCs, development of MOOC (materials) and in the design of MOOCs next to the use of MOOC platforms. The joint development of a European MOOC platform is not very likely as well as services on selling data, translation services and follow-up materials.
Collaboration with other organisations on MOOC offering, S 2015

Figure IV.1: Likeliness of areas on which institutions in overall survey (S2015) would collaborate with other HE institutions.
Figure IV.2: Likelihood of services that institutions in overall survey (150 HEIs) (S2015) would outsource to other providers

Figure IV.2 repeats the same question but now asks about the likeliness of services that institutions would outsource to other providers. In general the likeliness to outsource these services is much lower. Most likely services to be outsourced are related to the use of a MOOC platform and to co-creating MOOCs with other institutions in the context of cross-national educational programmes based on
MOOCs with other institutions.

Consequently, a corporate academic mix seems less likely to occur in Europe, and a cross-institutional/regional collaboration, with some government support, seems much more likely. The survey demonstrates that many European higher education institutions are willing to collaborate on scalable services in MOOC provision, and that a regional collaboration is much more likely that outsourcing services to corporates parties.
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