

MOOC Strategies of European Institutions

Status report based on a mapping survey conducted in November 2016 – February 2017

EADTU, September 2017



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Executive Summary

This report presents the results of a MOOC survey amongst Higher Education Institutions (HEIs) with a focus on Europe (97% of responses out of the European Higher Education Area (EHEA)). The majority of the responding HEIs are mainly publicly financed (82%) and have an on campus education provision (71%).

The questionnaire was open from 4 November 2016 until 14 February 2017 and consisted of 11 sections. Six sections are identical to the initial survey conducted in 2014 (Jansen & Schuwer, 2015) and seven sections identical to the 2015 survey (Jansen & Goes-Daniels, 2016). As such this report also discusses some initial trends in European MOOC strategies. Next to determining possible changes over the years, it also aims on getting more details about possible collaboration models and to know more about characteristics of the social dimension of MOOC involvement of European HEIs.

Uptake of MOOCs by HEIs

Last year's report (Jansen & Goes-Daniels, 2016) already demonstrated that a large percentage (at least 40%) of the European Higher Education Institutions seems to have developed a MOOC or is planning to develop a MOOC. This in contrast to in the United States (US) where the number of HEIs that have a MOOC, or is planning to add MOOC offering is stable at 12-13% for over four years.

When comparing the status of MOOC offering to the survey results of 2014 and 2015, a steady growth in the number of institutions offering MOOCs is seen. Institutions who are planning to add MOOC offerings and who not yet have decided about MOOCs is decreasing at the same time. However, the total number of institutions having or planning to add a MOOC is overall stable, with 68% in this 2016 and in the 2015 survey, and 72% in 2014.

The survey shows that the majority of HEIs (66%) are not connected to one of the big MOOC platform providers (e.g., edX, Coursera, FutureLearn, Miriada X, etc.), but offer their MOOCs in their institutional platforms or in available regional/national platforms. That the uptake of MOOCs in Europe is maturing at a much higher level compared to the US, is also an achievement of the regional, partially language-bound platforms.

Already 20% of responding HEIs offers six or more MOOCs, indicating a transition where HEIs are using MOOCs beyond pilot phase (although 32% still offers only one to five MOOCs).

Objectives of HEIs for MOOC involvement

Overall, already three consecutive surveys show that European HEIs are very positive towards using MOOCs to learn about online pedagogy and more than half of the respondents consider MOOCs to be a sustainable method for offering courses.

The primary objectives of HEIs in MOOC offering is overall consistent over the last three years. *Increase institutional visibility* and *flexible learning opportunities* are seen as the most important objectives for Higher Education Institutions. While *generating income*, *learning about scaling* and *exploring cost reductions* are believed to be the least important objectives throughout the last three years. However, this year, for the first time, *flexible learning opportunities* are seen as the most important objective to offer MOOCs (33%). The objective to *increase institutional visibility* is still seen

as important, but dropped to 23% compared to 33% in the 2015 survey.

Related to the relevance of objectives, *the innovation area of MOOCs (e.g., improve quality of on campus offering, contribute to the transition to more flexible and online education, improve teaching)* are seen as the most important cluster of objectives. In total 82% of the respondents consider it to be (highly) relevant for their institutions. Again, *financial reasons* are the least important objective, only 17% of the institutions viewed it as (highly) relevant. These results are very consistent over the last three survey years although a slight decrease of relevance regarding *reputation/visibility* and *demands of learners and societies* is observed (but still seen as (highly) relevant).

Related to the main (society) drivers behind MOOC offering, *the need for (e-) skills and jobs* together with *improving the quality of learning* are (highly) relevant for the participating institutions. In all three surveys the drivers *new form to educate the many*, *technical innovation push* and *openness as step to circulation of knowledge* are seen as (highly) relevant. The latter, however, is increased in relevance over the years, positioning MOOCs in Europe as part of the open education movement.

MOOCs for Opening up Education to all

MOOCs started with the promise to open up quality education for all. The vast majority of the respondents (51%) agreed that MOOCs should be for everyone, not for specific target groups. However, only 1% states that MOOCs should be specifically targeting those potentially left behind (e.g., unemployed, persons with disabilities, migrants and refugees).

Open Education has many dimensions (see for example UNESCO-COL publication by Patru & Balaji, 2016). One dimension is related to the re-use of material and open licences. Already 36% of the institutions are developing MOOCs to be re-used by other institutions and also 36% are re-using existing MOOCs for students in continuous and/or degree education.

When asked *If HEIs should develop a policy to open up their educational offer to those potentially left behind*, 74% of the respondents (strongly) agree. Also, the majority agrees (63%) with the statement that *Collaboration with NGOs and civil society organisations is essential to guarantee the use of MOOCs to those potentially left behind*. A wide variety of possible measures are suggested for opening up education to those potentially left behind, ranging from technological, pedagogical, facilitation and support, marketing, cooperation and costs.

Certification of MOOCs

In contrast to previous years, the number of institutions that believed credentials for MOOC completions caused confusion decreased by about 6% (respectively 16% and 17% in 2014 and 2016), compared to over 60% in the 2013 US survey (Allen & Seaman, 2014). A majority (63%) of the respondents (strongly) agrees with that statement that *it is essential to offer a formal (ECTS) credit next to more informal certificates like for example a certificate of participation* and even 70% (strongly) agrees that *these formal (ECTS) credits should be recognised in formal bachelor/master programs of the institution that offers the MOOC and these (ECTS) credits should be recognised by other HEIs as well (e.g., as part of joint programs or virtual exchange)*. As such this response shows a strong willingness to incorporate MOOC in regular education offering and recognise credit accordingly.

Need for European collaboration

As many HEIs 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. Moreover, data about MOOC participants, their behaviour and preferences related to the needs in society, etc. are strongly biased towards reports of the big MOOC platform providers. As many European MOOC efforts are local/regional (66% of responded HEIs), there is a lack of coherent research at a European level.

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.

Collaboration of outsourcing

The 2015 survey already demonstrated that many European HEIs are willing to collaborate on scalable services in MOOC provision, and that a regional collaboration is much more likely than outsourcing services to corporates parties. This year's survey confirms that European HEIs are very much willing to collaborate on services like co-creating MOOCs with other institutions, sharing and reusing elements from MOOCs, design and development of MOOC (materials). Collaboration on services like translation services and support on licensing (copyright-copyleft) is perceived as less likely. Two other studies done in 2016 confirm this, but in addition indicate a willingness to collaborate on a quality assurance framework for MOOCs and on recognition of each other's MOOCs.

Related to the organisation of MOOC support, European HEIs are most likely to collaborate with a regional or national support centre, least likely is the collaboration with a global market player. 56% of the respondents believe that support services in Europe(an regions) should not be provided by mainly for-profit organisations and should be financed by public means.

Next steps

As such, different stakeholders in Europe now call for different regional strategies to leverage the full potential of online learning and MOOCs. Results in this and other reports show that policy and decision makers of all stakeholders involved, need to be in a better position to understand the “MOOC phenomenon” in the European context, capitalise on the advantages of these largescale courses and use them as a strategic opportunity to meet local needs and develop related capacities. Governments should support and scale up multi-stakeholder partnerships for efficiency reasons, but also for the benefit of society as a whole. EADTU will be supporting universities in further development of MOOCs, in line with their strategic reasons of involvement, support regions in their development of local platforms and regional support centres and will strengthening European policy development on MOOCs.

The survey will be continued by the MOONLITE project for the upcoming years, supporting independent studies contributing to increased understanding of the strategic reasons why European HEIs are or are not involved in MOOCs. Next survey will open end 2017. Collaboration will be strengthened with other similar European studies including those from European MOOC platforms (e.g., FUN, FutureLearn). Additional research is needed to support several findings in this report.

Introduction

The MOOC (Massive Open Online Course) territory is very much a space of innovation and experimentation, and what is seen as a MOOC is still open to interpretation. However, in general a MOOC differs from a “regular” online course in at least four aspects (Patru & Balaji, 2016):

- It is designed for, in theory, an unlimited number of participants and as such is related to the scalability of the education services provided.
- It is accessible at no charge.
- It requires no entry qualifications.
- All elements of the course provision are provided fully online.

It should, however, be noted that the big MOOC platform providers are 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. Consequently, MOOCs remain relatively poorly defined. In this study (and in the questionnaires used) we refer to MOOCs as “*online courses designed for large numbers of participants, that can be accessed by anyone anywhere as long as they have an internet connection, are open to everyone without entry qualifications, and offer a full/complete course experience online for free*” (OpenupEd, 2014). Different criteria related to each MOOC letter were already validated in the 2014 survey (Jansen & Schuwer, 2015) and 2015 survey (Jansen & Goes-Daniels, 2016). Consequently those questions related to perception of MOOCs were not repeated in this report (2016 survey).

The MOOC hype in the media might be over, but investments in and the 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 offerings as Class Central mainly lists MOOC offering of the big (commercial) MOOC platforms. Many European universities have built an own platform or use a regional MOOC platform with a limited visibility. In addition, most universities are not accepted as partner 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 to list European MOOC offering ([MOOCs 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 on 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 - see for example Muñoz, Punie, Inamorato dos Santos, Mitic, & Morais (2016) and Jansen & Goes-Daniels (2016), but also recent initiatives like [BizMOOC project](#) and [MOOCKnowledge](#).

These studies indicate that a distinct European MOOC model is emerging. At least four independent European studies (Gaebel, Kupriyanova, Morais, & Colucci, 2014; Jansen & Schuwer, 2015; Muñoz et al., 2016 and Jansen & Goes-Daniels, 2016) conclude that the European Higher Education Institutions (HEIs) are much more involved in MOOCs compared to for example US (Allen & Seaman 2014, 2015, 2016) and also that their reasons to invest in this new format differs in some aspects as well. It is argued that these differences between the US and Europe might be related to the differences

between higher educational systems, political environments and educational values.

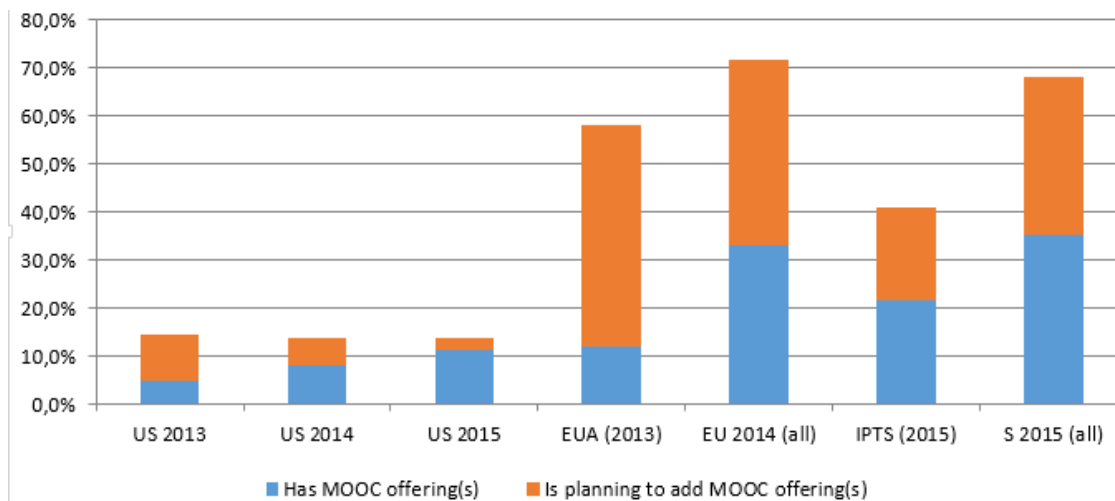


Figure 1: Institutional profile in their MOOC offering compared between that of US surveys (US 2013, US 2014 and US 2015 from Allen & Seaman 2014, 2015, 2016) with the EU surveys (EUA 2013 reported in Gaebel et al., EU 2014 reported in Jansen & Schuwer (2015), Muñoz et al. (IPTS 2015) and Jansen & Goes-Daniels (2016, S 2015).

Figure 1 (from Jansen & Goes-Daniels, 2016) demonstrated that a large percentage (at least 40%) of European HEIs seems to have developed a MOOC or is planning to develop a MOOC. There is no doubt that European HEIs joined the MOOC movement later, but contrary to the recent developments in the US, European HEIs are now engaging more with MOOC development and production (Jansen & Schuwer, 2015; Jansen & Goes-Daniels, 2016). Western European countries are the ones most engaged in EU MOOC initiatives. The majority of Eastern European countries are new players as they have just joined this development. However, an increasing uptake and interest in MOOCs have been recently highlighted in countries such as the Czech Republic (Rohlíková, Rohlík, Jansen, & Goes-Daniels, 2016) and Lithuania (Rutkauskiene, Gudoniene, Jansen, & Goes-Daniels, 2016).

This strong uptake of MOOCs by HEI in Europe is for one part related to funding of the European Commission. In the fall of 2013, the European Union (EU) launched the action plan Opening up Education (European Commission, 2013). This action plan is a joint concerted effort and integrated approach of the Directorate General for Education and Culture (DG EAC) and the Directorate General Connect and focuses on innovative teaching and learning for all through ICT, contributing to the modernising EU education through OER, digital competencies, infrastructures, interoperability, equity, quality, visibility, licensing, certification, etc.

MOOCs in this respect are considered an instrument for opening up education, and as such many MOOC projects are funded by the EU over the last few years. DG EAC already invests in different projects in their previous Lifelong Learning Programme and nowadays by Erasmus+, pilots and research related to MOOCs (HOME, BizMOOC, LangMOOCs, SCORE2020, MOOCs4all, MOONLITE, MOOC-Maker and many more). In addition, H2020 and FP7 programmes of the European Commission invest in MOOC projects like EMMA, ECO and TraMOOC.

The strong uptake of MOOC in Europe is also caused by increasing involvement of countries and

educational institutions which have formulated policies on open and online education and have launched initiatives in favour of developing, adapting, adopting and sharing quality online educational provisions like MOOCs (see for example overview by Jansen & Konings, 2016).

This report is a continuation of previous survey efforts on the MOOC response of European HEIs as conducted by the [HOME](#) project - *Higher education Online: MOOCs the European way*, which ended in June 2016. The initial aim of the survey conducted in 2014 - as described Jansen and Schuwer (2015) and Jansen, Schuwer, Teixeira, & Aydin (2015) – are:

- strategy of HEI on MOOCs and the reason (not) to be involved
- to compare the strategy of European HEIs with US (using comparable US studies)

In 2015, the survey was repeated again but extended with the following aims (Jansen & Goes-Daniels, 2016):

- to start comparable study between countries in Europe (next to comparison to US)
- the reasons and subjects on cross-institutional collaboration and outsourcing to (private) organisations.

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 this is related to the social dimension of the European educational system along with a multi-stakeholder involvement.

These surveys contribute to a better understanding of the strategic reasons why a Higher Education Institution is or isn't involved in MOOCs, and compared these reasons with the results of similar studies. To this end these 2014-2015 surveys were repeated again end 2016 – early 2017. Next to determine possible changes over the years, it also focusses on getting more details about possible collaboration models and to know more about characteristics of the social dimension of MOOC involvement of European HEIs.

This research is conducted and produced as part of the [MOONLITE](#) Project (2016-1-ES01-KA203-025731) and some questions are developed in close collaboration with [BizMOOC](#) and the [SCORE2020](#) project as well as supported by [OpenupEd](#). These projects are supported by the European Commission, DG EAC, under the [Erasmus+ Programme](#).

The survey will be continued by the MOONLITE partners for the upcoming years, supporting an independent study, offering full privacy for all respondents, and providing free distribution of all report publications.

About the MOONLITE project

This report is published as part of the [MOONLITE](#) project – *MOOCs for Social Inclusion & Employability*. MOONLITE is partly funded by the Erasmus+ programme of the European Commission. MOONLITE started in September 2016 and is funded to August 2019. The project aims to strategically utilise existing learning opportunities from MOOCs to build entrepreneurial and language skills in Europe.

Methodology

This study was conducted using the online survey instrument Google Forms. This study is largely a repetition of the survey from 2014 (Jansen & Schuwer, 2015) and 2015 (Jansen & Goes-Daniels, 2016). Both years' some results were compared to the studies in the US (Allen & Seaman 2014, 2015, 2016), i.e. a number of questions were adapted. The questions from section 1 to 5, as listed below, were kept identical to the 2014 and 2015 surveys, whereas sections 6 to 11 contain additional questions, that were developed in the course of 2016 and tested among the MOONLITE partners. Higher Education Institutions (HEIs) were in general approached by email. In addition, social media and announcements in the EADTU newsletter were used to generate additional responses. The survey was open from 4 November 2016 until 14 February 2017.

The survey consisted of the following 11 sections (Annex 6 includes the complete survey):

1. Profile Information
(2 multiple choice questions and 6 open questions)
2. Status of MOOC offering, main target group
(5 multiple choice questions and 2 open questions)
3. Your opinion on the following statements
(4 identical questions as used in the US surveys)
4. Primary objective for your institution's MOOCs
(1 question with 9 options identical to US survey plus one open question)
5. Relative importance of the following objectives for your institution's MOOCs
(4 closed questions on 5 point Likert scale and one open question)
6. How important are the following macro drivers for offering MOOCs?
(10 closed questions on 5 point Likert scale)
7. Stimulation of the use/uptake of MOOCs
(3 open questions)
8. Collaboration on MOOC offerings
(15 closed question on 6 point Likert scale and 2 open questions)
9. Organisation of support services
(5 closed question on 5 point Likert scale)
10. Identification of opportunities and barriers for recognizing MOOC-based learning
(3 closed questions on 5 point Likert scale plus 2 open questions)
11. MOOCs for opening up education
(1 multiple choice question, 2 closed questions on 5 point Likert scale and 2 open questions)

Most closed questions could be scored on a 5-point scale ranging from *Not at all relevant for my institution* to *Highly relevant for my institution*. Exceptions are those closed questions that were included from the US survey (Allen & Seaman 2014, 2015, 2016). In addition some questions were

added with a 5-point scale ranging from *Strongly disagree* to *Strongly agree*.

Response and institutional profiles

In total 101 institutions responded out of 24 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. This resulted in a corrected total of 99 institutions. Figure 2 shows the amount of institutional responses per country.

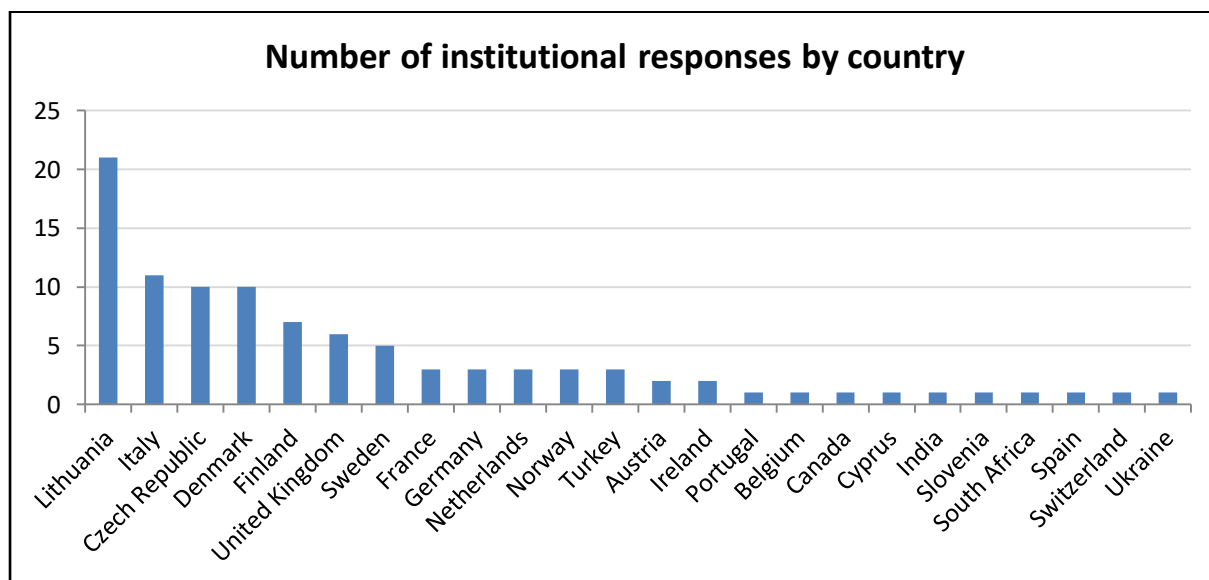


Figure 2: *Number of institutional responses by country*

Just as in last year’s survey report the responses of HEIs from all countries are included. Nevertheless, the European Higher Education Area (EHEA) makes for a total of 97% of the responses, compared to 85% in 2015. Hence, the results in this survey can, to a large extent, be compared to the 2014 (Jansen & Schuwer, 2015) and 2015 survey (Jansen & Goes-Daniels, 2016). This year the response is somewhat dominated by relative large response from Lithuania. In addition to this report, separate country reports for Lithuania (last year results available at Rutkauskiene et al., 2016) and Czech Republic (2015 results published in Rohlíková et al, 2016) will be published as well.

The majority of the responding Higher Education Institutions are mainly publicly financed (82%), whereas 7% of the institutions are mainly privately financed. The others have a mixed financing system. In total, 71% of the universities responding to the questionnaire have an on campus education provision, while 21% of the responses came from institutions with a mixed provision. The other responses came from online/distance universities. The people responding to the questionnaire varied from professors to rectors.

Comparison with similar studies

In this survey report various studies with similar audiences are compared, using the same questions. Table 1 summarises the main characteristics of these five European surveys. This study, abbreviated as S2016 is mainly a continuation of the surveys EU2014 (Jansen & Schuwer, 2015) and S2015 (Jansen & Goes-Daniels, 2016). The year mentioned in these abbreviations refers to the year the survey was conducted. In the EU2014 survey, the respondents were limited to the European Higher Education Area, whereas the S2015 survey includes French Canada and a limited response (3%) from other non-European countries as well. Moreover, EUA2013 refers to the European survey in 2013 published by Gaebel, Kupriyanova, Morais, & Colucci (2014) and IPTS2015 to those published by Muñoz et al. In addition, EU2014, S2015 and S2016 are about MOOCs only, while the other two surveys (EUA2013 & IPTS2015) have a broader scope, focussing on e-learning, online learning or open education as well.

The main difference from the studies EU2014 & S2015, is that in this year's study a comparison to the US surveys (Allen & Seaman 2014, 2015, 2016) will no longer be possible, as they changed their questionnaire and/or not included the MOOC questions in other reports anymore. Therefore, this survey report will mainly be focussing on the European Higher Education Area.

Table 1: *Survey Characteristics of Different MOOC Studies*

<i>Survey</i>	Sample methodology	Total sample	Institutions Responded	Institutions answering MOOC questions
<i>EUA2013</i>	Self-selected sample (EUA members)	800 in European Higher Education Area	249	All 249
<i>IPTS2015</i>	Self-selected sample	Only selected HEIs France, Germany, Poland, Spain and the UK	178	Neff 118
<i>EU2014</i>	Open	Potentially all HEIs in European system	67	All 67
<i>S2015</i>	Open	All HEIs, mainly Europe and French Canada	150	All 150
<i>S2016</i>	Open	All HEIs, mainly European Higher Education Area	99	All 99

All studies are biased to some extent. The EUA2013 study is biased in favour of EUA member institutions involved in e-learning. EU2014, S2015 and this study (S2016) seems to be biased to those countries and institutions interested in MOOCs. The IPTS2015 study preformed post-data correction to type of HEIs, to region and to involvement in open education (Muñoz et al., 2016).

Status of MOOC offering

One of the questions asked during the 2016 survey was about the offering of MOOCs at the participating institutions. As shown in Figure 3, the majority of the institutions is already offering MOOCs (43%) or is planning to add MOOC offerings (25%). Only 9% of the institutions will not be adding a MOOC. The rest of the respondents did not yet decide about whether or not to offer MOOCs.

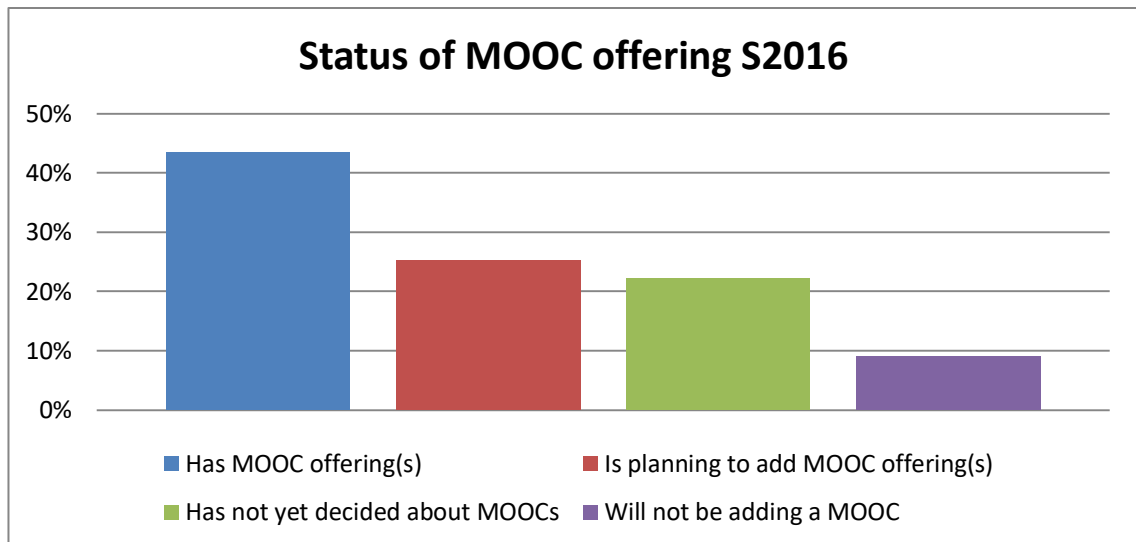


Figure 3: Institutional profile in their MOOC offering for this survey (S2016)

In total, 32% of the participating institutions offers one to five MOOCs, 14% offers six to twenty MOOCs and 6% more than twenty MOOCs. This indicates that many HEIs are still experimenting with MOOCs. Note that seven institutions who are planning to add MOOCs is already offering MOOCs, so it could be interpreted that the number of institutions already offering MOOCs is actually 50%, instead of 43%. Compared to 2015, the number of HEIs offering more than six MOOCs increased from 15% to 20%.

When comparing the status of MOOC offering to the survey results of 2014 (EU2014) and 2015 (S2015), a steady growth in the number of institutions offering MOOCs is seen (see figure 4). Institutions who are planning to add MOOC offerings and who not yet have decided about MOOCs is decreasing at the same time. In total, 9% of the institutions have decided to not be adding MOOCs, compared to 7% last year and 1% in 2014. The number of institutions having or planning to add a MOOC is in total 68%, compared to 68% in 2015 and 72% in 2014.

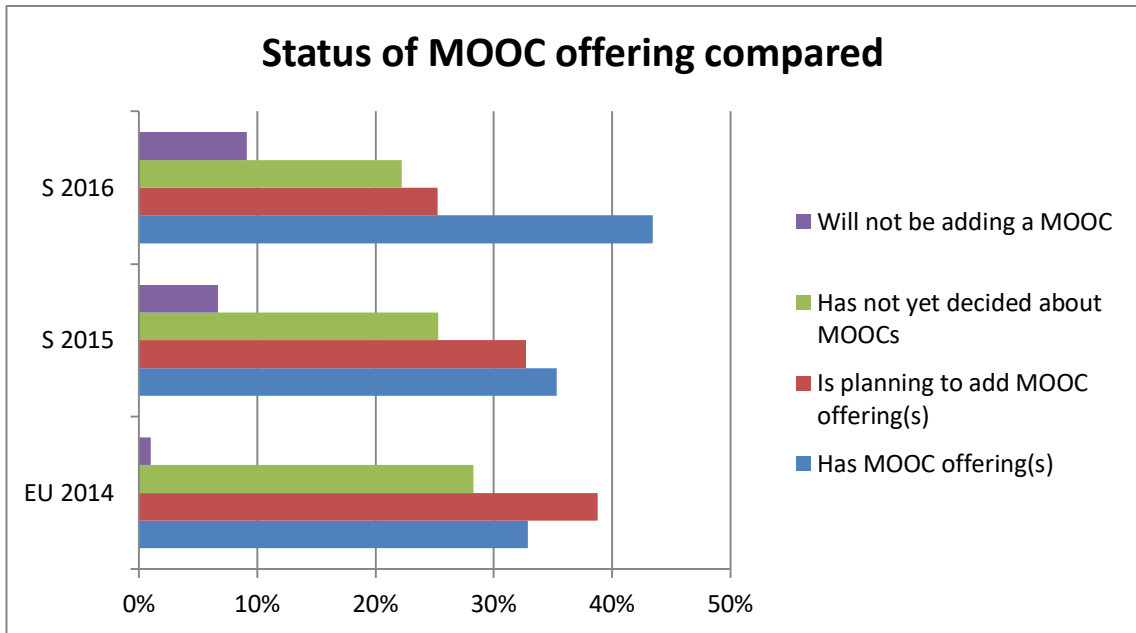


Figure 4: Institutional profile in their MOOC offering (S016) in comparison with responses from previous surveys (EU 2014, S2015)

One could conclude that HEIs planning to add a MOOC in 2014 or 2015 now indeed offer MOOCs nowadays. However, the number of responses in this survey is too low to generalise. The same conclusion was made in the US after three years of study (Allen & Seaman 2016). See also figure 1 (Introduction section) for comparison between other surveys (as discussed in Jansen & Goes-Daniels, 2016).

From the institutions that are offering MOOCs, 34% chooses to get involved with one of the big MOOC platform providers (e.g., edX, Coursera, FutureLearn, Miriada X, etc.), as can be viewed in Figure 5. Another 29% of the HEIs have installed one of the open source (MOOC) platforms at their institution (e.g., Moodle, OpenedX, OpenMOOC, etc.). In total, 25% of the universities are collaborating on a MOOC platform in their own regions/country (e.g. FUN). The last 12% of the responding institutions have developed their own dedicated institutional MOOC platform. Note in this context that data about MOOC participants, their behaviour and preferences, related to the needs in society, etc. are strongly biased towards reports of the big MOOC platform providers. As many European MOOC efforts are local (66% of responded HEIs), there is a lack of coherent research at a European level and as such, lack evidence on what is really going on in Europe related to MOOCs. Promising is that some initial research is conducted in Europe (see Introduction), but stronger collaboration and more in depth studies are required.

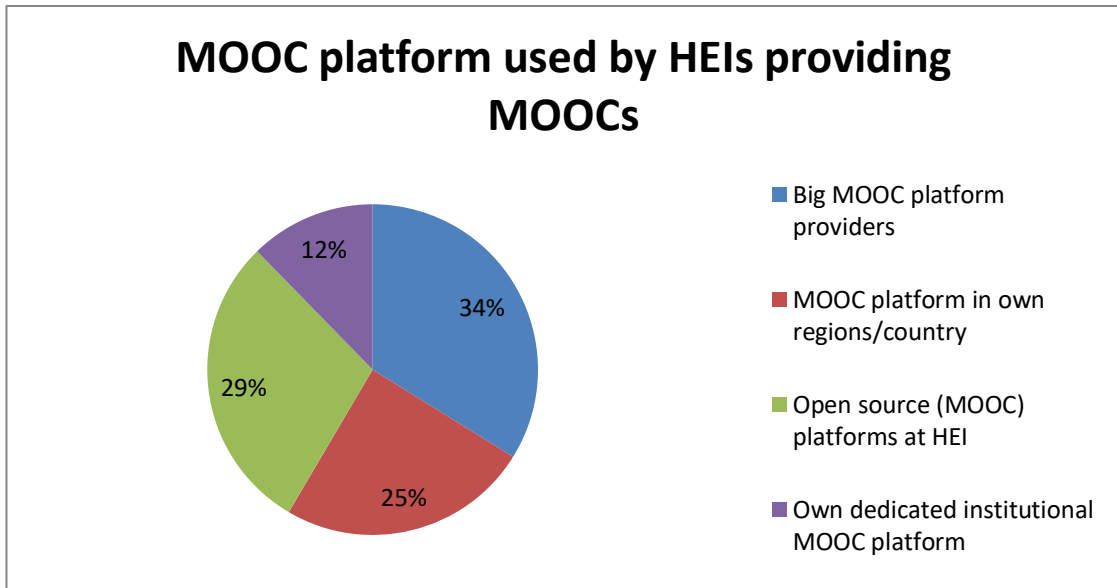


Figure 5: MOOC platform that you use (optional questions, only for those HEIs that already offer MOOCs) (S2016)

This year two (yes/no) questions were added related to the (re-)use of MOOCs. Here, 36% of the institutions who are developing MOOCs, offer them to be re-used by other institutions. This implicitly implies that those HEIs are applying an open licensing policy to their MOOC(-materials). However, this requires a follow-up research (e.g. by interviews) to determine how those HEIs are stimulating re-use of MOOCs. This is relevant data related to possible collaboration models as will be discussed in section *Collaboration or Outsourcing of services in MOOC offering*.

When looking at the use of existing MOOCs, 36% of the responding HEIs (re-)use existing MOOCs for students in continuous and/or degree education. I.e., those HEIs are targeting the MOOCs as part of their regular educational offering.

Figure 6 summarises the answer to the question *What should be the main target group for MOOCs?* The vast majority of the respondents (51%) agreed that *MOOCs should be for everyone, not for specific target groups*. This still indicates that MOOCs are still connected to their initially social inclusion goals, given access to quality education to all people. In this context the low percentage (1%) stating that MOOCs should be *specifically targeting those potentially left behind (e.g., unemployed, persons with disabilities, migrants and refugees)* (1%) is somewhat surprising as some MOOC platform providers report relative large percentages of MOOC participants from those groups (e.g. FutureLearn). However, this only stresses that specific measures can be implemented to support those groups without specially targeting those potentially left behind. This can be measures related to the design/ development of MOOCs, applying standards for Web-accessibility, accessible information and accessible learning in order to serve these specific target groups as well¹. Other possible measures are discussed in the last section of this report (MOOCs for opening up education).

Another 23% of the institutions believed that the main target group should be *further education students (including lifelong learners - Continuous Professional Development)*, 6% of the HEIs think

¹ For example, [W3C accessibility](#), [WCAG 2.0 according to EC](#), [Guidelines for Accessible Information](#) and guidelines for [Universal Design for Learning](#)

full-time students enrolled at other universities should be the main target group, whereas others consider the main target group to be people without access to the traditional educational system (6%), students from other universities (2%) and part-time students (1%).

Other answers given included among others, “all our students, alumni, students from partner universities and everybody” and “Some MOOCs are for the public good globally; other MOOCs are revenue-generating so for specific audiences; both types should be part of a public-funded institution’s MOOC strategy”.

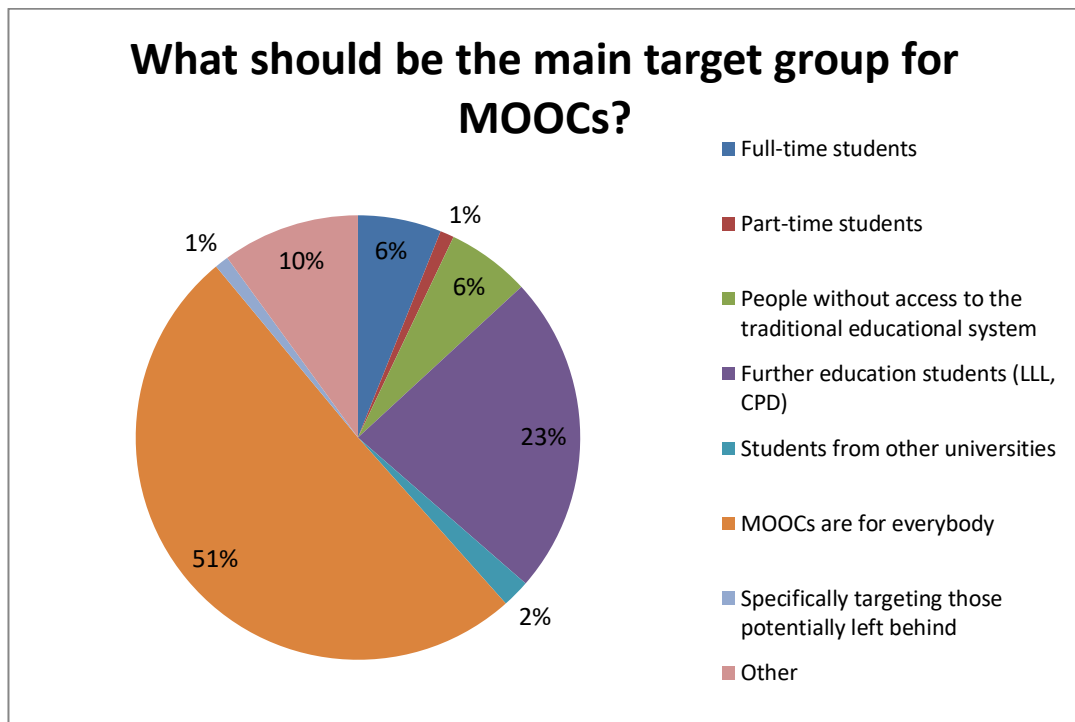


Figure 6: What should be the main target group for MOOCs? (S2016)

In the previous survey (Jansen & Goes-Daniels, 2016), the same question was asked but respondents could choose more than one specific target group – leading to a non-distinctive response. When required to choose one target group, the majority of respondents opt for massive audiences serving many target groups. Note that this is part of the original MOOC definition and has consequences for designing MOOCs compared to regular (online) courses targeting one specific target group (Patru & Balji, 2016).

Role of MOOCs compared

In this section the results of the survey questions are discussed that were identical to the ones of the US Survey of 2013 (Allen & Seaman, 2014). All questions were also repeated in the European survey of 2014 (Jansen & Schuwer, 2015) and the overall survey of 2015 (Jansen & Goes-Daniels, 2016).

Figure 7 presents the answers to the question if *Credentials for MOOC completion will cause confusion about higher education degrees*. In contrast to previous years, the number of institutions that believed credentials for MOOC completions caused confusion decreased by about 6%. The participants who were neutral to this statement increased by about 12%, compared to 2014/2015. This question was only included in the 2013 US survey (Allen & Seaman, 2014) where over 60% responded positive on this question.

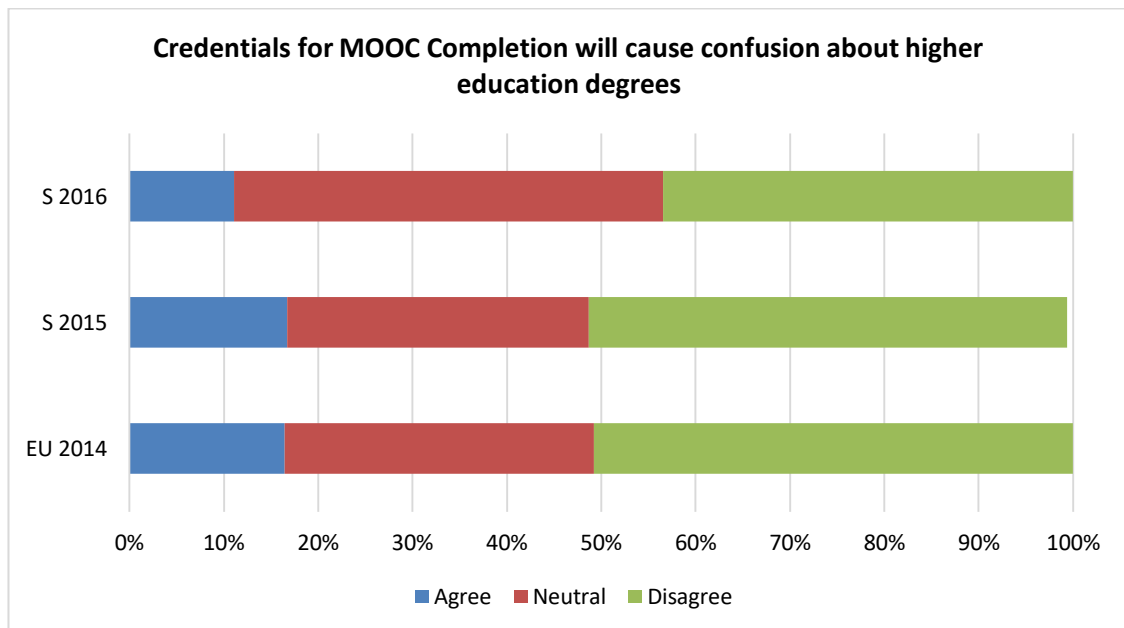


Figure 7: Replies to the question “Credentials for MOOC completion will cause confusion about higher education degrees?” (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Overall, MOOCs are still seen as important for institutions to learn about online pedagogy as revealed in Figure 8. In comparison to the previous surveys, there is a slight and steady increase in the number of participating institutions disagreeing on this matter. Overall, in already three consecutive surveys, European HEIs are much more positive towards using MOOC to learn about online pedagogy (against neutral in the US, Allen & Seaman, 2014 and 2015).

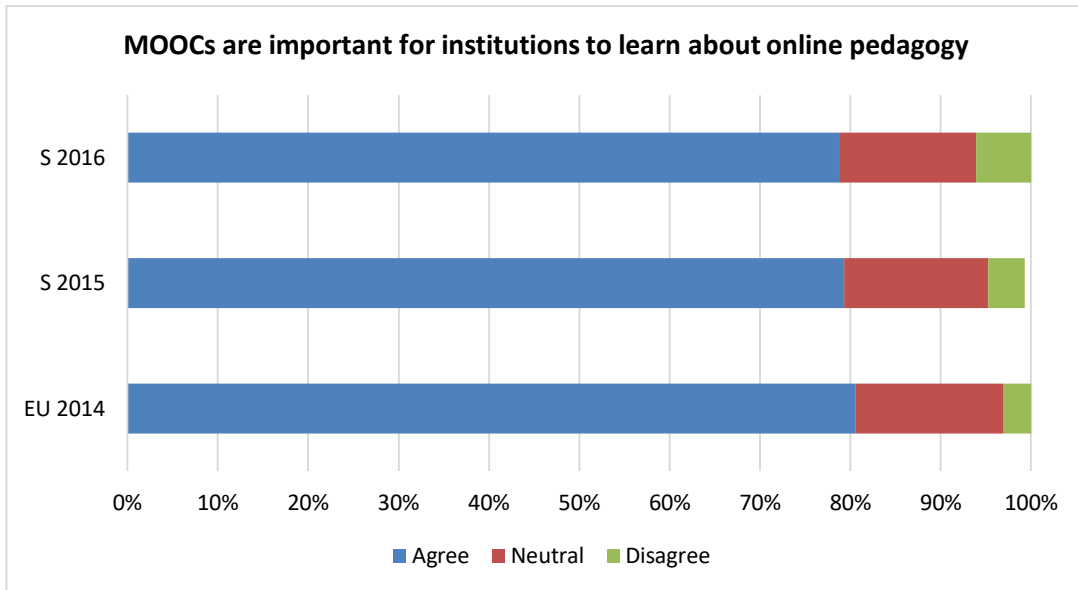


Figure 8: Replies to the question “MOOCs are important for institutions to learn about online pedagogy” (S016) in comparison with responses from previous surveys (EU 2014, S2015)

As shown in Figure 9, more than half of the respondents consider MOOCs to be a sustainable method for offering courses. The differences in opinions only slightly vary with previous survey results. This again highlights the difference with US-institutions (mostly neutral or disagree) highlighting a general positive experience/attitude towards MOOC in Europe. This positive attitude of European HEIs towards sustainability, together with the observation that many institutional objectives are met to some degree, requires further in depth study.

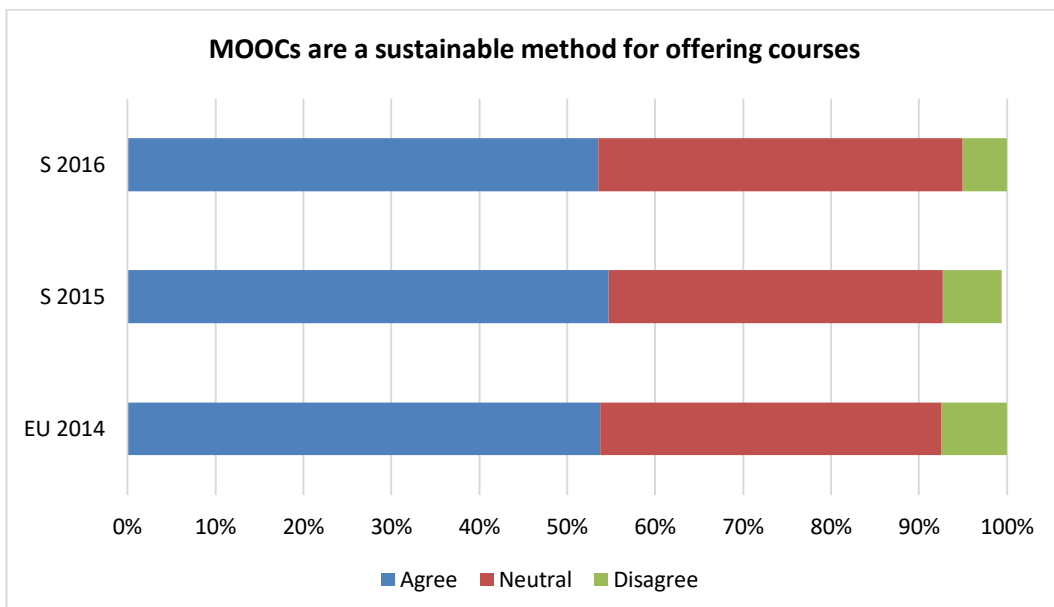


Figure 9: Replies to the question “MOOCs are a sustainable method for offering courses” (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Institutional objectives on MOOCs

This section deals with the institutional objectives of Higher Education Institutions with respect to MOOCs.

The question *How well are MOOCs meeting institution's objectives* was adopted from the US survey (Allen & Seaman, 2014). In the US, over 65% of institutions found this too early to tell. Figure 10 shows the results of European HEIs on this question in three consecutive surveys. In this year's survey (S2016), 47% of the respondents agreed that MOOCs meet most or some of their institution's objectives. This response is in line with the 45% who agreed in 2015 (Jansen & Goes-Daniels, 2016). In contrast, the European Survey of 2014 showed a somewhat more positive result of 58%. This difference in results could be caused by the variation in target group and the change in institutional objectives throughout the years (figure 10).

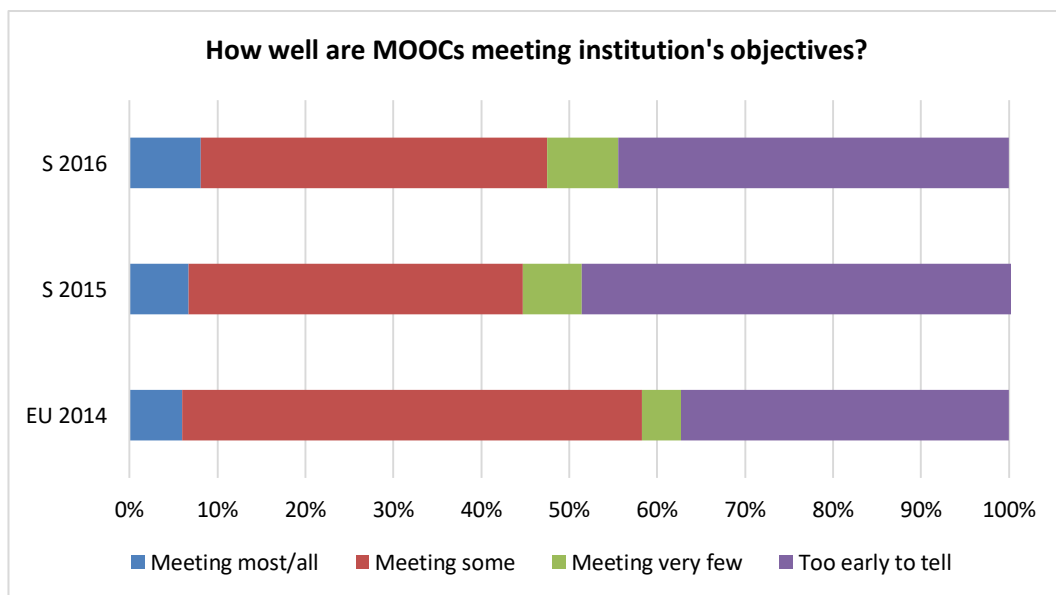


Figure 10: Replies to the question “How well are MOOCs meeting institution's objectives?” (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Figure 11 lists the HEIs primary objectives to offering MOOCs. The response over the three consecutive surveys in 2014, 2015 and 2016 is in general consistent. Generating income, learning about scaling and exploring cost reductions are believed to be the least important objectives to institutions in all three surveys (EU2014, S2015, S2016). While *increase institutional visibility* and *flexible learning opportunities* are seen as the most important objectives for HEIs to be involved with MOOCs.

However, this year, for the first time, *flexible learning opportunities* are seen as the most important objective to offer MOOCs (33%). The objective ‘to increase institutional visibility’ is still seen as important but dropped to 23% compared to 33% in the 2015 survey. The rest of the respondents were of the opinion that innovative pedagogy and reaching new students is the main reason to offering MOOCs.

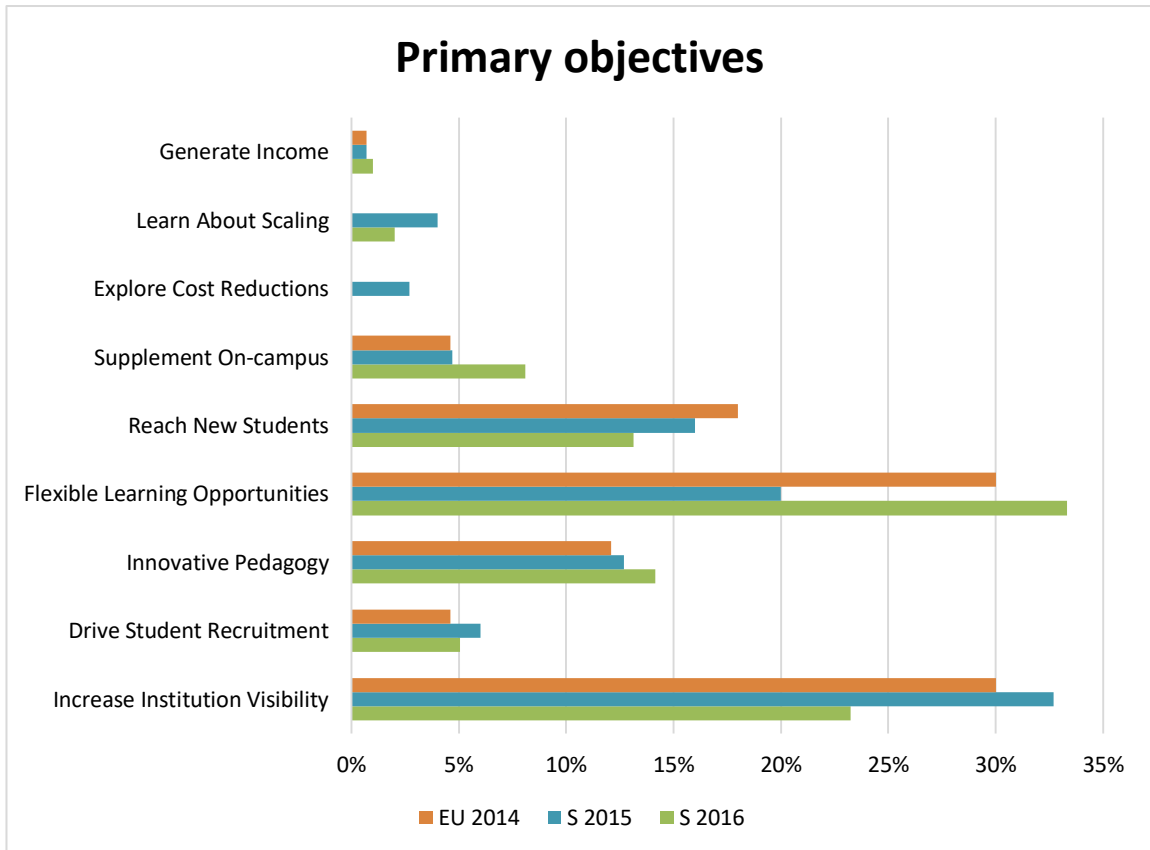


Figure 11: Primary objectives to offer a MOOC (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Note that the response related to *innovative pedagogy* is relative low compared to the previous question “MOOCs are important for institutions to learn about online pedagogy” (Figure 8). This difference might be explained by a) it is (very) important for responded HEIs but not seen as the primary objective to be involved and/or b) learning about online pedagogy serves as a goal to create flexible learning opportunities. In addition, the objective to *reach new students* seems to increase somewhat over the years. This in contrast to US surveys conducted in 2013 and 2014 where *drive student recruitment* is seen as much more important in the US compared to these three surveys (and that US response on *reach new student* is much lower as well).

In Figure 12 the relevance for four cluster objectives are outlined. I.e., respondents can indicate the relevance instead of choosing the primary objective as in previous question. The rationale behind these four clusters of objectives are extensively elaborated on in the European report “*Institutional MOOC strategies in Europe, Status report based on a mapping survey conducted in October - December 2014*” (Jansen & Schuwer, 2015).

The institutional participants of this survey assessed the *innovation area* to be the most important cluster of objectives (Figure 13). In total, 82% of the respondents consider it to be (highly) relevant for their institutions. *Reputation/visibility* is also seen as either highly relevant or relevant. The survey participants differed more in their opinion regarding the *demands of learners and societies*, although still seen as relevant by the majority of the people. *Financial reasons* are the least important objective, only 17% of the institutions viewed it as (highly) relevant.

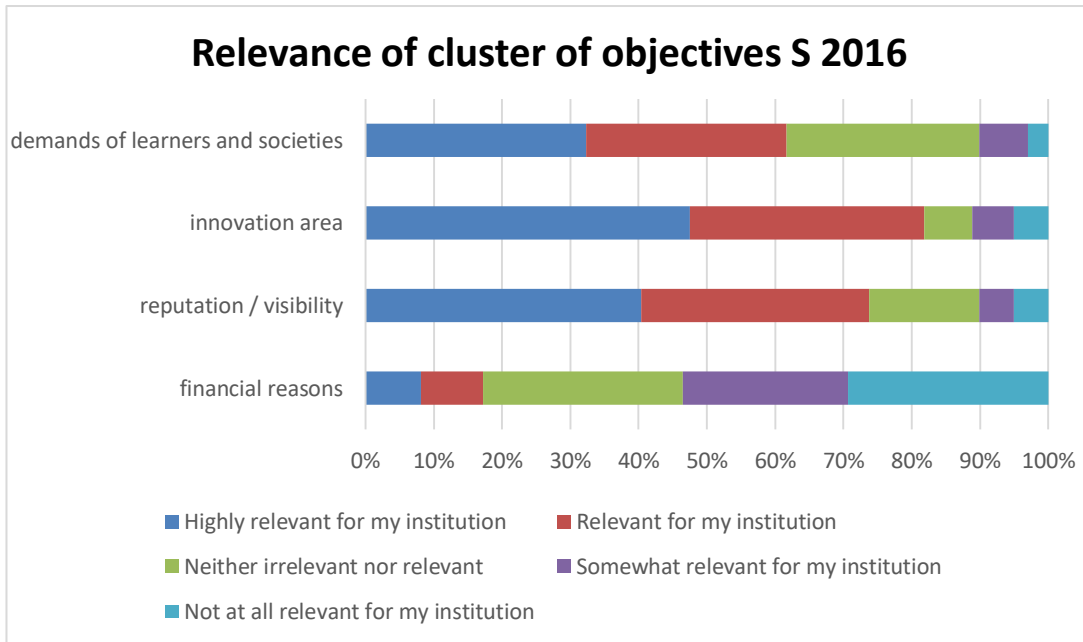


Figure 12: Relevance of four different clusters of objectives (S2016).

Figure 13, 14, 15, 16 show the results of those three surveys for each of the four cluster of objectives. When comparing the response with the two previous surveys, the results are very consistent over the years. In all three surveys (EU2014, S2015, S2016) the use of MOOCs as innovation area is seen as a (highly) relevant objective for respondents' institutions (respectively 87%, 79% and 81%, Figure 13).

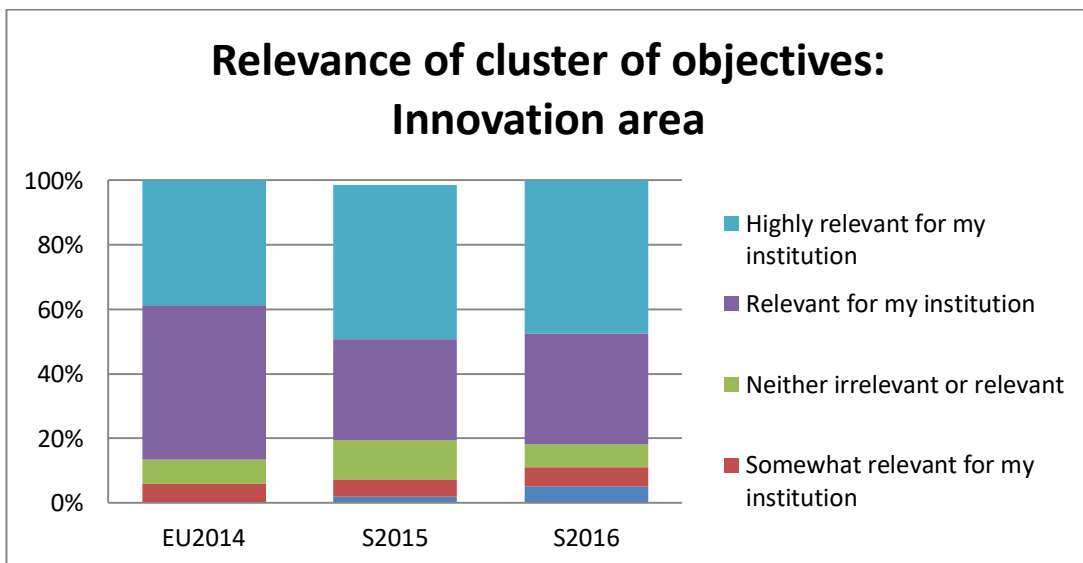


Figure 13: Using MOOCs as innovation area (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Figure 14 shows that MOOCs are also important for the reputation/visibility of most institutions. Even so, a steady decrease in importance is seen in the responses. In 2014, 55% of the HEIs perceived this cluster of objectives as highly important, in comparison to 49% in 2015 and 40% in 2016. Additionally, more and more institutions believe reputation and visibility is neither irrelevant nor relevant for their institutions. This was also concluded out of figure 11.

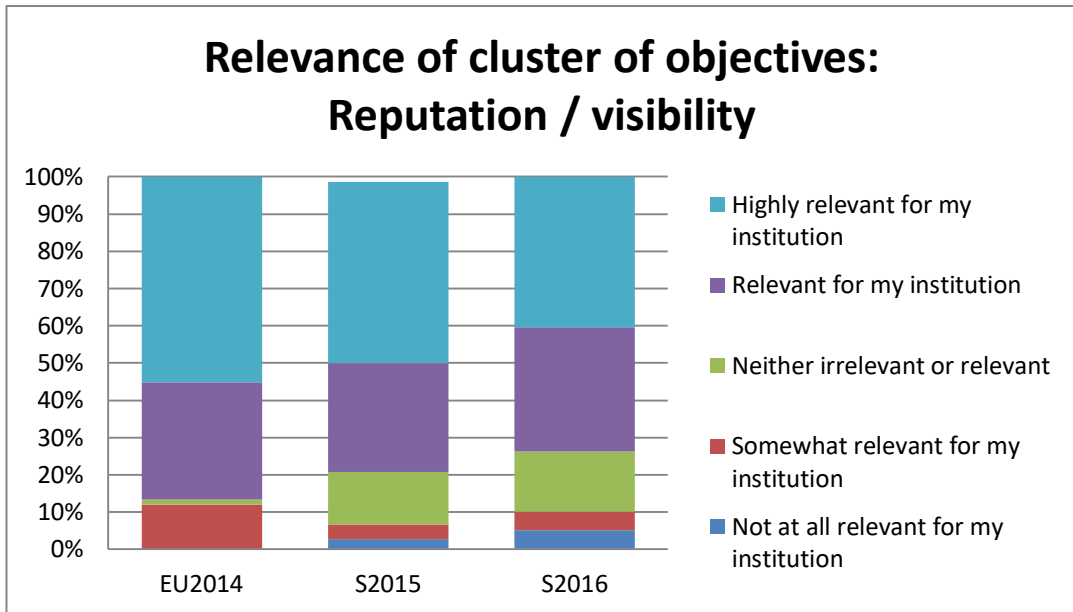


Figure 14: Using MOOCs for Reputation/visibility (S016) in comparison with responses from previous surveys (EU 2014, S2015)

The institutional relevance in responding to the demands of learners and societies is also decreasing by almost 10% each year (Figure 15).

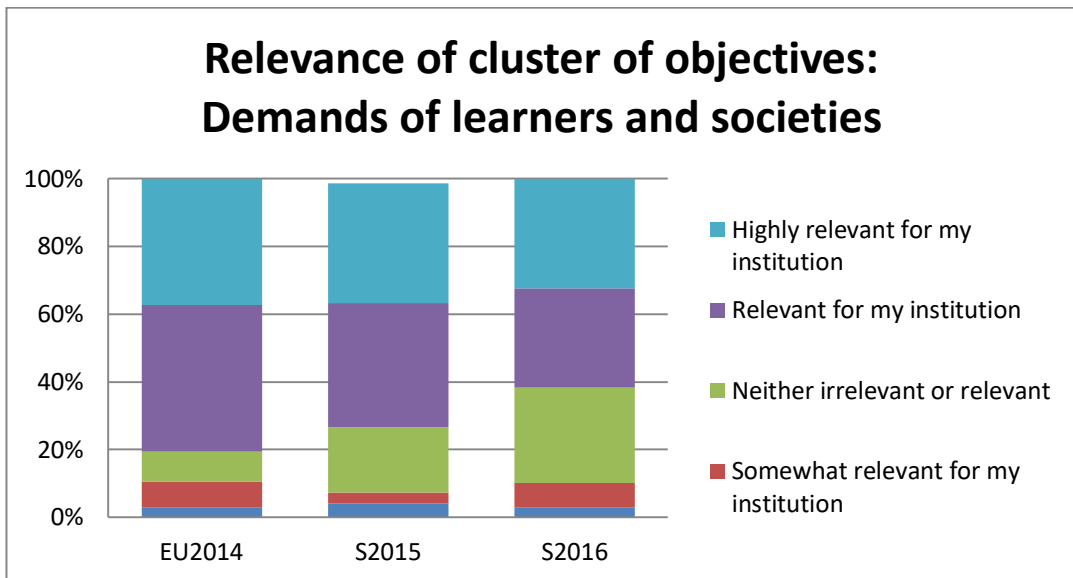


Figure 15: Responding to the demands of learners and societies (S016) in comparison with responses from previous surveys (EU 2014, S2015)

The opinions are very much divided on the use of MOOCs for financial reasons. Throughout all three consecutive surveys, the majority of the universities do not see the objective *MOOCs for financial reasons* as important consistent with previous question (Figure 11). Only 17% sees this as (highly) relevant compared to 23% in 2014 and 2015 (Figure 16).

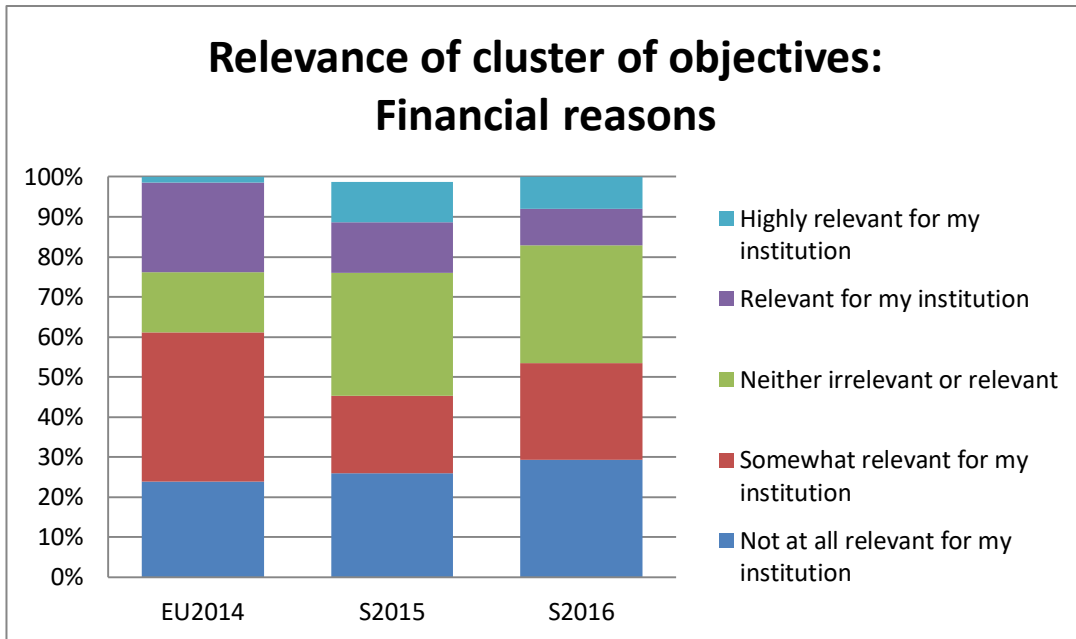


Figure 16: Using MOOCs for financial reasons (S016) in comparison with responses from previous surveys (EU 2014, S2015)

Macro drivers behind MOOC offering

In this part of the survey report the importance of ten different macro drivers for offering MOOCs is discussed. Jansen & Schuwer (2015) extensively discusses the macro drivers behind the MOOC movement.

Figure 17 shows the relevance of macro drivers for Higher Education Institutions. The *reduction of costs* was the least important macro driver for institutions, only 8% perceived it as highly important. This is consistent with both the 2014 and 2015 survey as can be viewed in Figure 18. Also *New method in big business* are seen as less relevant throughout all years.

In all three years *need for (e-) skills and jobs* together with *improving the quality of learning* are (highly) relevant for the participating institutions. There is however a shift regarding the latter. In 2015, *improving the quality of learning* stood out as highly relevant (39%), whereas in 2016 the opinions shifted somewhat to relevant. In all three surveys the drivers *new form to educate the many*, *technical innovation push* and *openness as step to circulation of knowledge* are seen as (highly) relevant. The latter however, is increased in relevance: 70% of 2016 (Figure 17) respondents sees this driver as (highly) relevant compared to 56% in 2015 (Figure 18). The driver *global education market* seems to be perceived somewhat less relevant: (highly) relevant for 49% of the 2016 respondents, compared to 71% in 2015.

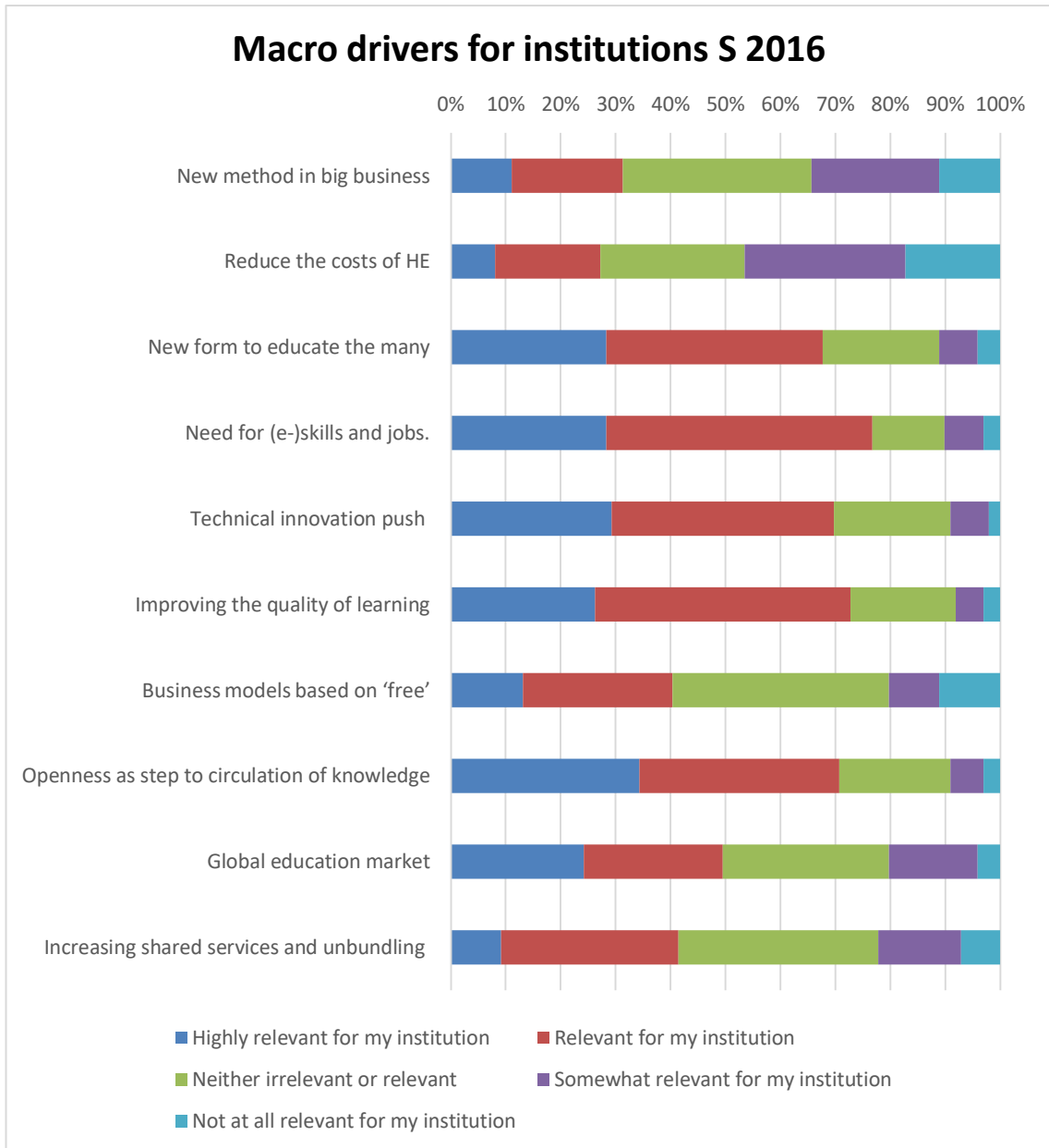


Figure 17: *Relevance of 10 different macro drivers for Higher Education Institutions in 2016 survey (S2016)*

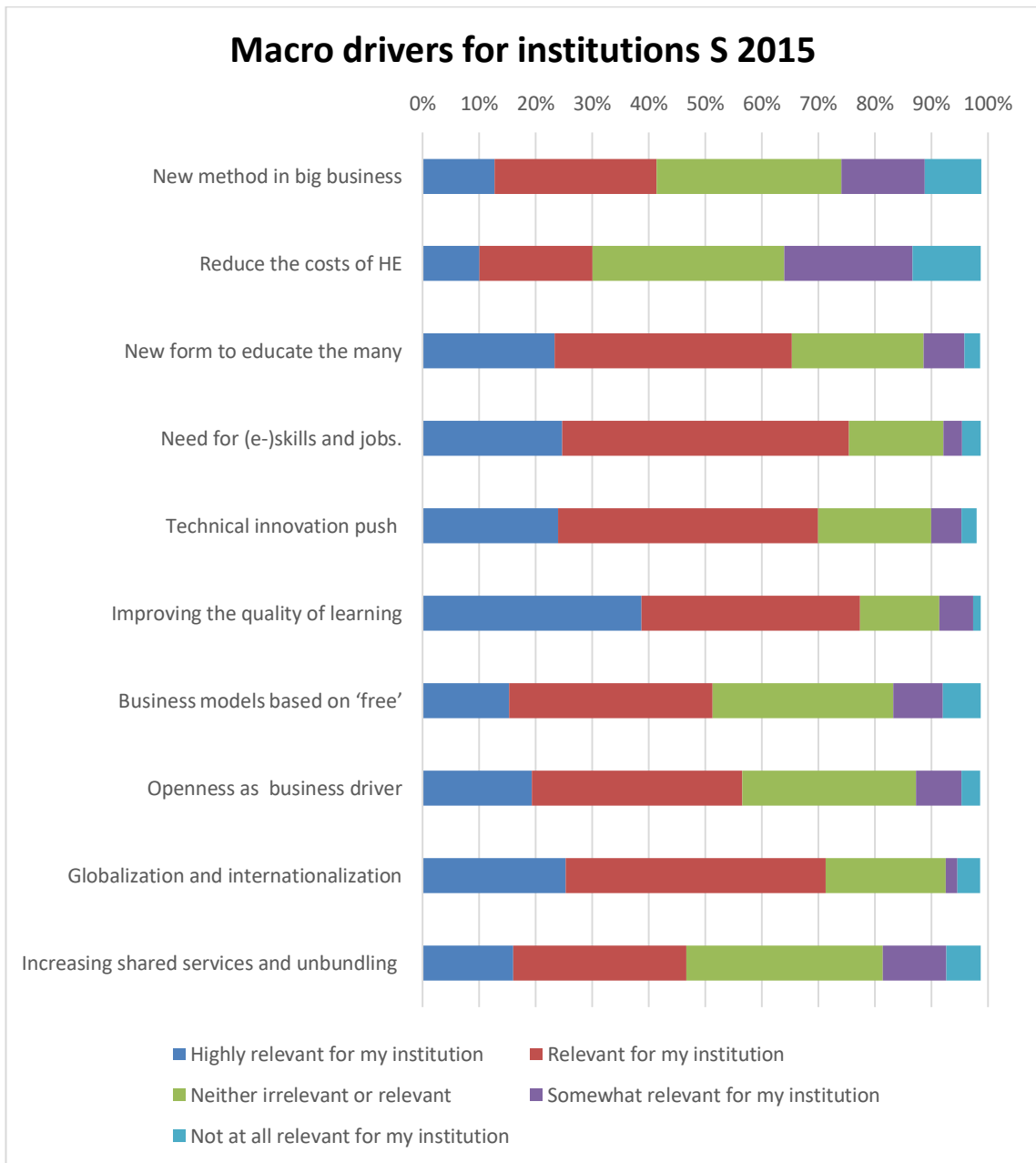


Figure 18: *Relevance of 10 different macro drivers for Higher Education Institutions in 2015 survey (S2015)*

Collaboration or Outsourcing of services in MOOC offering

Services HEIs are likely to collaborate on

Most European universities are not accepted by the big MOOC platform providers (e.g., edX, Coursera, FutureLearn, Miriada X, etc.) by lacking the reputation (in ranking) and/or the finances to become a partner. HEIs are therefore looking for alternatives by developing their own MOOC platform mainly based on OpenedX and Moodle, using a cloud solution like Canvas, starting a regional collaboration (e.g. FUN in France, EduOpen in Italy, CADUV in Czech Republic). Results presented earlier (Figure 5) already stated that 34% of the respondents choose to get involved with one of the big MOOC platform providers.

That the uptake of MOOCs in Europe is maturing at a much higher level compared to the US (Figure 1), 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.

In this section the likelihood of institutional collaboration with other Higher Education Institutions is discussed. In the survey, the HEIs were asked whether they were likely to collaborate with other institutions on fifteen different areas, as can be viewed in the list below.

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

Figure 19 shows the results of the 2016 survey, while Figure 20 presents the results of an identical question in the 2015 survey with a more extended list of possible support services. It is generally observed that European HEIs are very much willing to collaborate on services like *co-creating MOOCs with other institutions, sharing and reusing elements from MOOCs, design and development of MOOC (materials)*. Collaboration on services like *translation services* and *support on licensing (copyright-copyleft)* is perceived as less likely. These outcomes confirm the results of the 2015 survey (Figure 20), although a somewhat more positive attitude is observed regarding the joint development of a European MOOC platform.

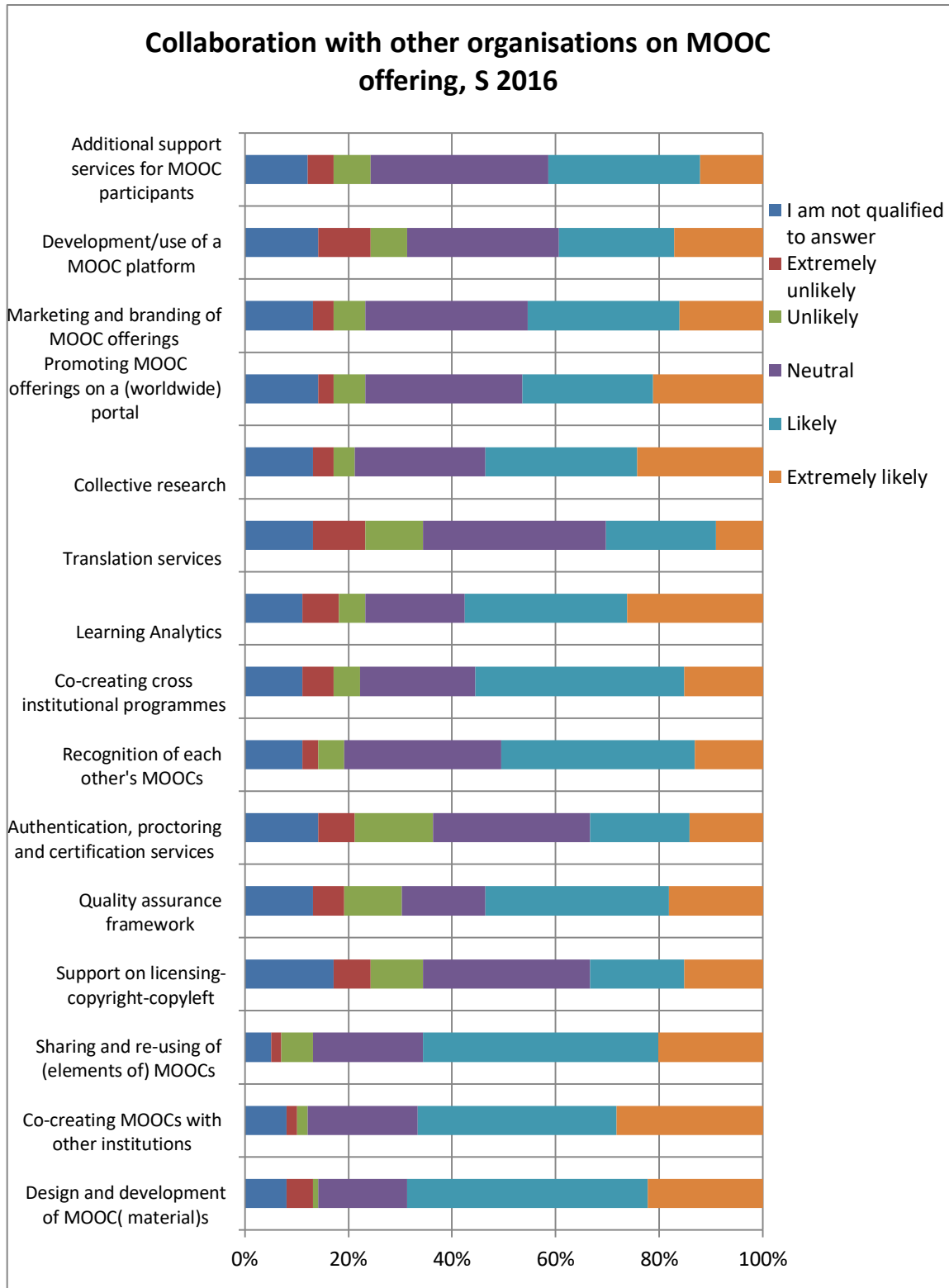


Figure 19: Likeliness of areas on which institutions in overall survey (S2016) would collaborate with other HE institutions.

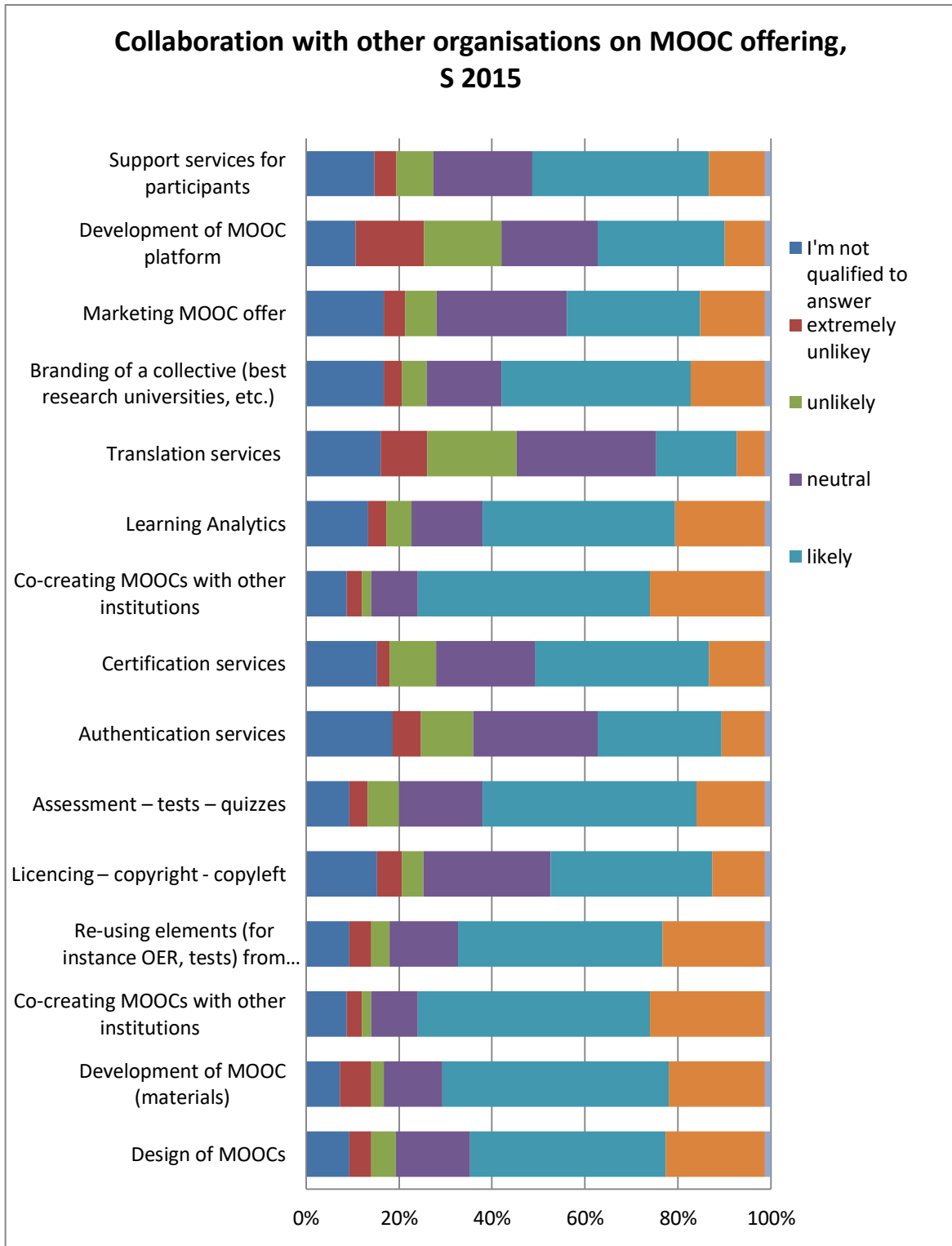


Figure 20: Likelihood of areas on which institutions in overall survey (S2015) would collaborate with other HE institutions.

Comparison of four surveys on collaboration in MOOC offering

The question on the likeliness of areas on which institutions would collaborate with other HE institutions is also conducted amongst OpenupEd partners (referenced in Table 2 as Survey OpenupEd) and amongst participants of four different (multiplier/trainings) events organised by SCORE2020 in 2016 and early 2017 (references as Survey SCORE2020). Results of those surveys are discussed in a separate report (SCORE2020, 2017). Table 2 summarises the most important support services to collaborate on according to respondents of those 4 surveys, indicating an overall consistency on services HEIs in Europe want to collaborate on.

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

Survey SCORE2020	Survey OpenupEd	S2016	S2015
design and development of MOOCs <i>co-creating MOOCs with other organisations</i> <i>a quality assurance framework</i> <i>development/use of a MOOC platform</i> <i>learning analytics</i> <i>recognition of each other's MOOCs</i>	support OpenupEd partners with the design and development of MOOCs (expert seminars, training, guidelines, etc.) <i>promote the sharing and reuse of MOOCs</i> support the improvement of the quality of MOOCs by offering a quality assurance framework and tools to partners (quality label, institutional quality review) <i>develop a network of regional/national MOOC, or other educational support structures</i>	design and development of MOOC materials co-creating MOOCs with other institutions sharing and re-using of (elements of) MOOCs	<i>development of MOOC (materials)</i> <i>design of MOOCs</i> co-creating MOOCs with other institutions <i>re-using elements (for instance OER, tests) from MOOCs</i> <i>use of MOOC platform</i> <i>co-creating cross-national educational programmes based on MOOCs with other institutions</i>

Reasons (not) to collaborate or outsource services

The survey has the following open question: *What would be the primary reasons for your HEI (not) to collaborate with others on MOOCs?* An overview of answers given is listed in Annex 1. The financial reasons as well as some competition reasons are seen both in favour and 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.

The 2015 survey (Jansen & Goes-Daniels, 2016) had 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 2016 survey only had one related open question: *What would be the primary reasons for your HEI (not) to outsource some MOOC services to others like private companies?* An overview of answers given is listed in Annex 2. 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 are not in favour for outsourcing. 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.”*

Organisation of MOOC support

Geographical organisation of MOOC support

This survey also asked *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 with by a global market player

The results as presented in Figure 21, show that European HEIs are most likely to collaborate with a regional or national support centre. Least likely for most European HEIs is the collaboration with a global market player. This might be related to the earlier result (Figure 5) that 66% of the respondents with MOOC offering choose not get involved with one of the big MOOC platform

providers.

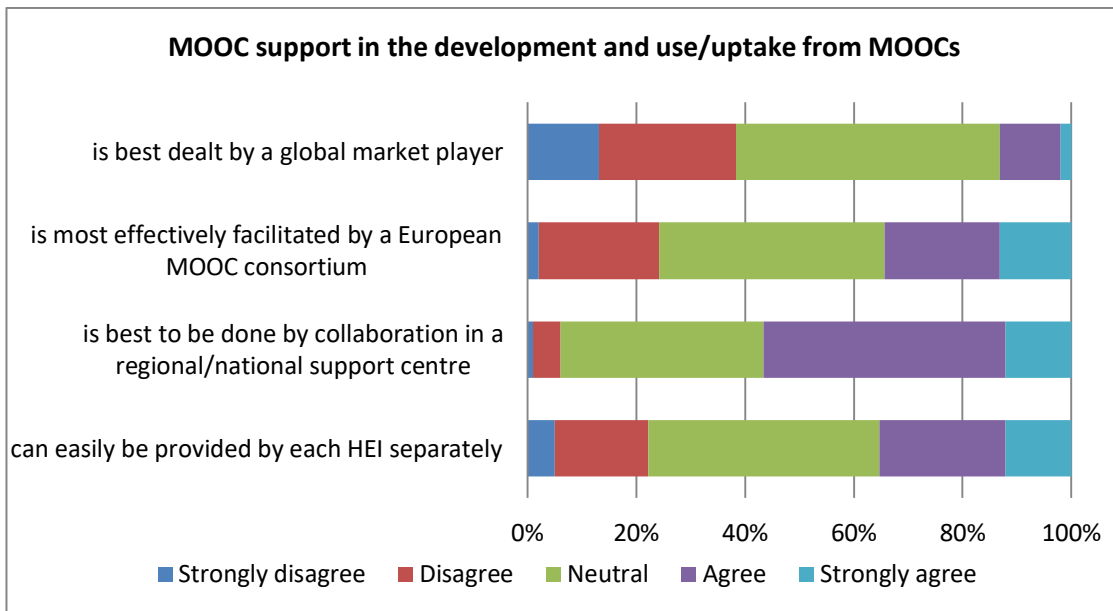


Figure 21: MOOC support in the development and use/uptake from MOOCs (S2016)

Financing the support services in Europe(an regions)

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 (see Figure 22). The majority of the respondents (56%) believed that support services in Europe(an regions) should not be provided by mainly for-profit organisations.

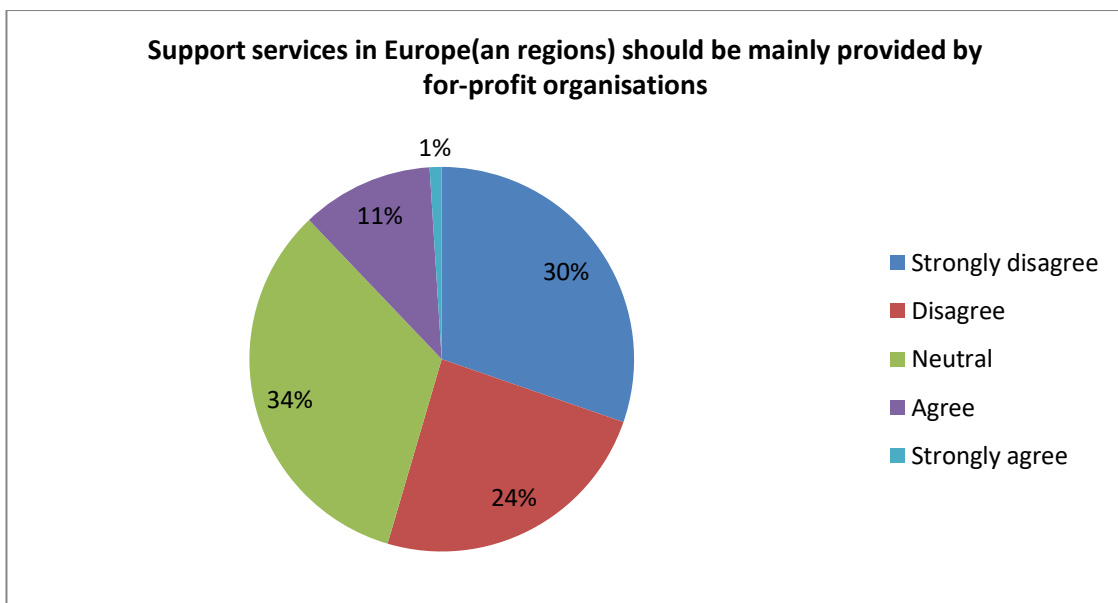


Figure 22: Support services in Europe(an regions) should be mainly provided by for-profit organisations (S2016)

The SCORE2020 survey (SCORE2020, 2017) had a related question on “MOOC support in the development and use/uptake from MOOCs is mainly financed by..” with three options (private

parties, public means and by participants). The vast majority of the SCORE2020 respondents (62%) 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.

Other studies confirm that the social dimension of MOOCs is seen as an important feature in Europe (Jansen & Goes-Daniels, 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.

Opportunities and barriers for mature MOOC uptake

The survey has the following open question: *What are the main barriers that prevent a mature uptake of MOOCs?* A complete overview of answers given is listed in Annex 3. Main barriers mentioned are related to lack of funding, financial investments needed, resources needed including the skills and competences for teachers. In addition, many do see barriers related to awareness, rigid educational system, the challenges related to awards and credits, legal barriers, institutional incentives and miss the overall strategy also in relation to online education in general. Other issues mentioned are related to quality, languages and infrastructure including suitable MOOC platforms.

Not surprisingly, the different actions to boost the use and uptake are related to these barriers. Many suggest that funding schemes next to supportive policies on licensing, awards, law and guidelines are needed. Also (policies on) credits and recognition are seen as needed to boost the uptake of MOOCs. Awareness and marketing is mentioned by many respondents as well, with some dedicated actions related to increasing awareness amongst senior management and policy makers. In this context, many stress the importance of a better knowledge of the market and the changes needed in MOOCs themselves. Collaboration between institutions and public bodies and integration of MOOC in on campus education, professional development and virtual Erasmus schemes are seen as important as well. Some advocate the relevant of local context both in language, market and nation portals/platforms. See Annex 4 for a complete overview of answers given to the open question: *In your opinion, what would boost the use/uptake of MOOCs in your region?*

Identification of opportunities and barriers for recognising MOOC-based learning

In addition, two closed and two open questions were dedicated to the potential barriers and opportunities in recognising MOOC-based learning. Figure 23 shows that a majority (63%) of the respondents (strongly) agrees with that statement that *it is essential to offer a formal (ECTS) credit next to more informal certificates like for example a certificate of participation*. Figure 24 demonstrates that even a larger majority (70%) believes that *these formal (ECTS) credits should be recognised in formal bachelor/master programs of the institution that offers the MOOC and these (ECTS) credits should be recognised by other HEIs as well (e.g., as part of joint programs or virtual*

exchange). As such, this response shows a strong willingness to incorporate MOOC in regular education offering and recognise credit accordingly. This is in line with results presented in Figure 7 that given credits will not cause confusion about higher education degrees.

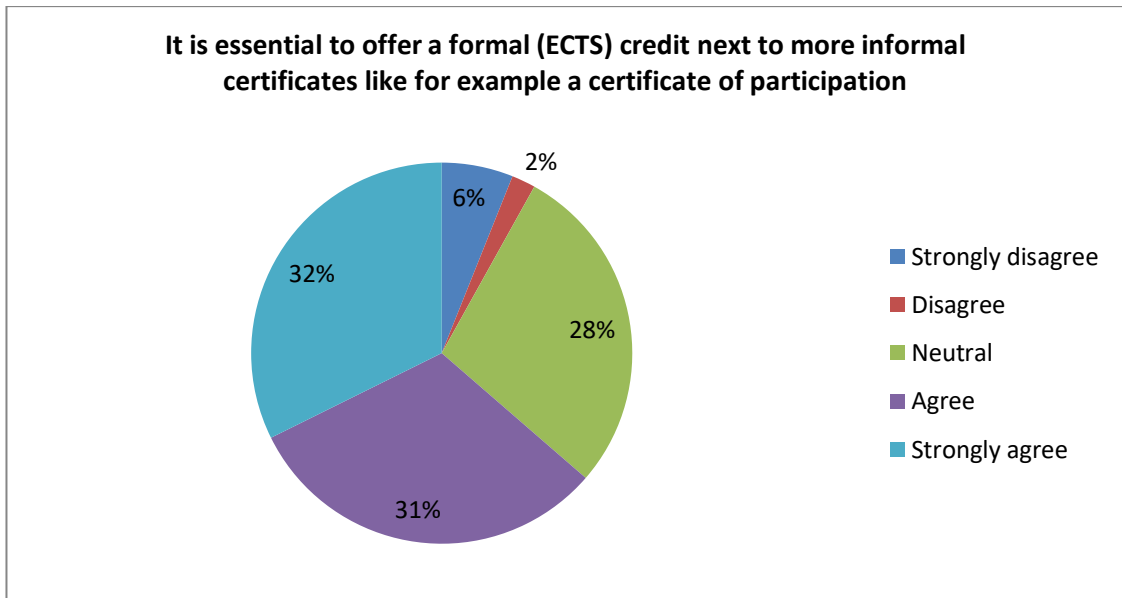


Figure 23: *It is essential to offer a formal (ECTS) credit next to more informal certificates like for example a certificate of participation (S2016)*

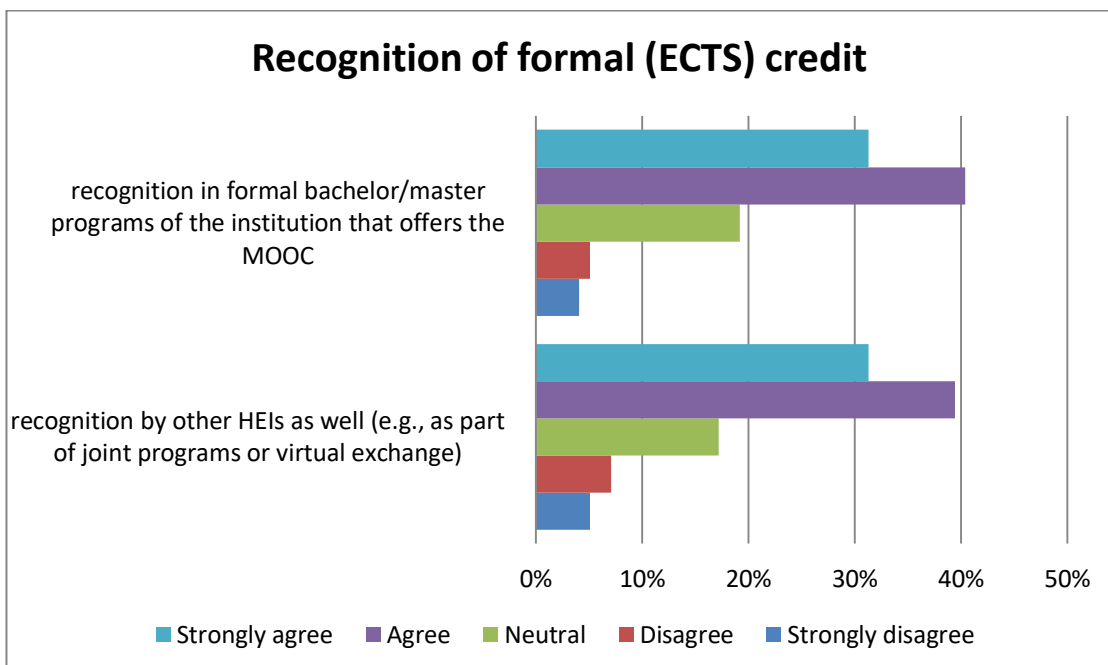


Figure 24: *Recognition of formal ECTS credits in bachelor/master programs and by other HEIs (S2016)*

Overall, a wide variety of answers was given to the open question: *What are, in your opinion, the*

opportunities for recognising MOOC-based learning? In general, many think this will enhance the uptake of MOOCs (*“The appeal on the market will dramatically increase”*) and the change in educational culture/structure. For example, one respondent stated *“A HEI needs to formally refine its structures, processes and practices to meet the requirements for acknowledging MOOC-based learning. Otherwise it is up to the actions of the individuals, as no institutionalized approaches have been defined and deployed”*. Recognising non-formal courses and partial courses will increase innovation of flexible learning paths for heterogeneous students, personalisation and more flexible integration of non-traditional students. *“Make it less daunting for a student to join an accredited programme. They feel that they have already achieved something on the programme”* and *“Wider reach of the higher education to different parts of society”*.

Some state that this will lead to more competition, better quality in education, greater mobility, widening participation, and inclusion. Next, some mention that cooperation between HEIs will increase especially for those who have limited (financial, physical and human) resources. One person even states that the opportunities strongly depend on each HEI, but that there should be a general policy for the whole EU.

When asked about the barriers for recognising MOOC-based learning, respondents frequently indicate quality of MOOCs, the way how to ensure it, including reliable assessment and are missing a clear model for recognising MOOC based learning. The latter is partly caused by legal barriers, for example in Italy *“there is a limit imposed by law of a maximum recognition of 12 ECTS in each degree course at university level, but should be increased”*. As such, some respondents see *national regulations, legislation and QA frameworks* as a barrier as well and believe *“a European level regulation would be welcome”*.

Other barriers are related to competition, institutions unable to cooperate, the autonomy of faculties, the lack of knowledge about MOOC at strategic level and how on campus education is funded. Regarding the latter, the following statement is provided: *“Universities are afraid that MOOCs will replace their many varied versions of teaching the same basic course - like Psychology 101 and other large courses. Provincial² funding model is based on number of full time undergraduate students so if that declines because some portion of their 4 year experience can be achieved online, not full time, universities will not want that to happen (unless the provincial funding model is changed to support that kind of flexible offering for students)”*.

MOOCs for opening up education

MOOCs started with the promise to open up quality education for all. Open Education has many dimensions (see for example UNESCO-COL publication by Patru & Balaji, 2016). One dimension is related to those potentially left behind and as such are related to using MOOCs for social inclusion (for example targeting unemployed, persons with disabilities, migrants and refugees). However, by now it is recognised that special measures are needed to make educational offers like MOOCs suitable for those target groups. In this context the following open questions was asked: *“What kind of measures for opening up education to those potentially left behind, are in your opinion, essential?”*

² Editorial footnote: referring to subnational entity (e.g., administrative division, region) in respective country,

Many respondents found it hard to tell, do not know and/or do not think about this issues related to MOOCs. Note that only 1% of the respondents was specially seeing *those potentially left behind* as the main target group for MOOCs (see Figure 6). Various suggestions were given related to:

- technological (web- accessibility, creation of accessible content, availability of videos for downloading, all MOOCs must be mobile, blackout-proof platform design, bandwidth internet in 3rd world countries, no firewall China)
- pedagogical (adapted courses - like NGO project evaluation, subtitles, inclusive didactics, multiple language options for studies, granular content, multi-disciplinary topics with easy access and reiteration of concepts through many spectrums)
- facilitation and support (start-up guide, no prerequisites, CC licensing of content, in-service training, reskilling job seekers, shorter courses that can be stacked, onsite on online study groups, helplines, tutor's support and diagnostic tools)
- dedicated marketing in collaboration with civil society organisations
- cooperation with adult education, learning centres, public libraries etc. / helping them find learning opportunities
- cost (reduced cost for paper exams in developing countries, exam grants, fee waiver, ensure financing, government policies together with funding instruments)

“MOOCs alone can’t solve the issue of underserved groups, but they can be used as content in more comprehensive initiatives” states one of the respondents. Another person explains “Also, offering MOOCs by itself would not be enough in many cases. It should be considered as one of the actions of a larger project.” A third survey respondent even states “Definitely, not MOOCs, but rather open educational resources and open education itself. MOOCs is a very very narrow concept which has to do with the scope decision during curriculum designing. Curriculum should be adapted to the disadvantaged groups instead of talking about MOOCs”. Note that these are suggested measures such that MOOCs become more suitable for use in social inclusion. A separate study is needed to determine the implementation and effectiveness of these measures.

When asked *If HEIs should develop a policy to open up their educational offer to those potentially left behind*, 74% (strongly) agrees (see Figure 25). The respondents are somewhat less convinced that *Collaboration with NGOs and civil society organisations is essential to guarantee the use of MOOCs to those potentially left behind* (Figure 26), 63% (strongly) agrees with this statement and 32% is neutral towards this.

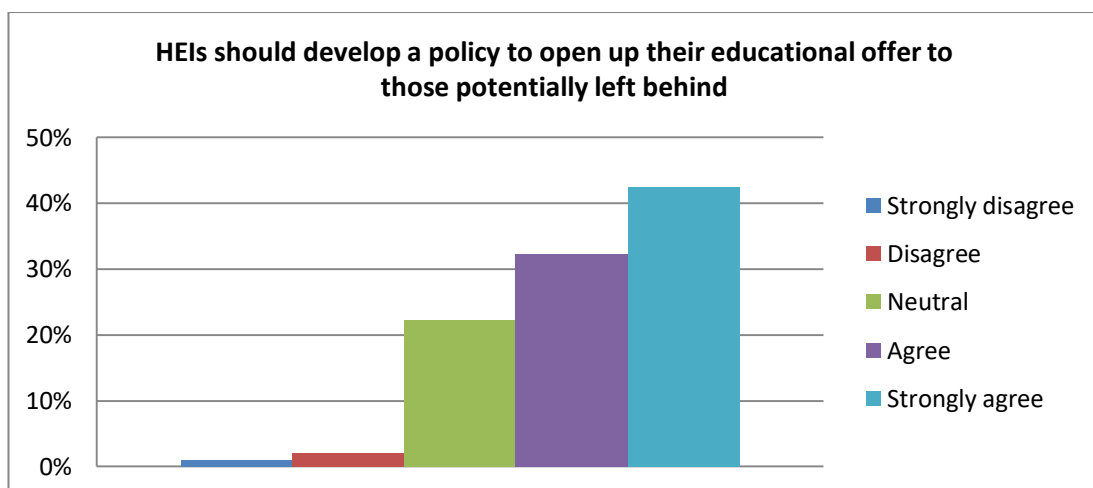


Figure 25: HEIs should develop a policy to open up their educational offer to those potentially left behind (S2016)

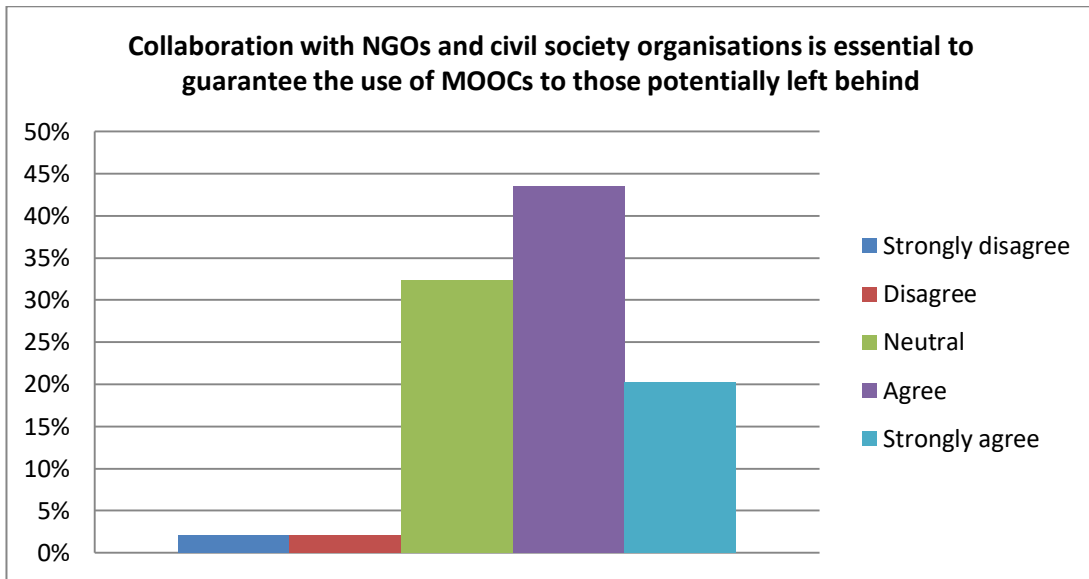


Figure 26: Collaboration with NGOs and civil society organisations is essential to guarantee the use of MOOCs to those potentially left behind (S2016)

When asked *If the institution delivers MOOCs on topics that are highly interesting for those potentially left behind*, only 34% responds positively (Figure 27). Examples of those topics are mainly related to health, medicine, civic rights, basic law, study skills and learning to learn, math, language courses, ICT, project management and entrepreneurship. See Annex 5 for the complete list of topics given.

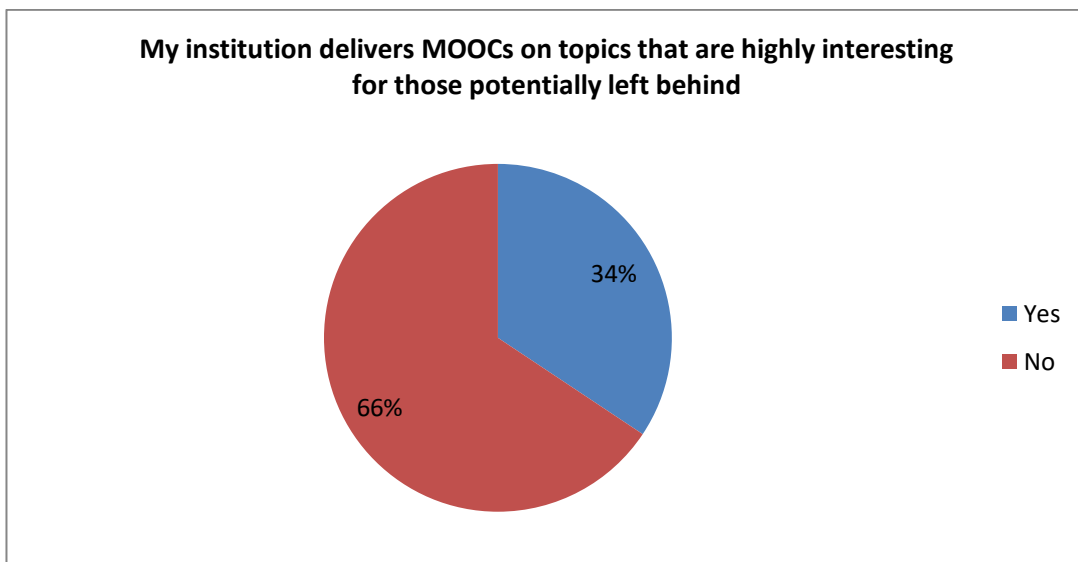


Figure 27: My institution delivers MOOCs on topics that are highly interesting for those potentially left behind (S2016)

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Annexes

Annex 1: List of answers on reasons (not) to collaborate

Here below an overview of answers given is to the following 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
- 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 pool 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

Annex 2: Reasons (not) to outsource

Here below an overview of answers is given to the following open question: *What would be the primary reasons for your HEI (not) to outsource some MOOC services to others like private companies?*

FINANCIAL

- Funding
- 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
- If there was something we could not do ourselves and we could save money/time in doing so.
- depends on the cost
- Money
- The costs
- Sound learning outcomes and good salary for teachers.
- In favour in order to get incomes or resources.
- 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.
- Funding
- finance
- cost efficiencies
- too costly maybe ? but we do outsource some MOOC services to a private company
- No funding available for outsourcing
- Cost-efficiency, improved quality, increased compliance among the service provider etc.
- Cost
- Economic benefits

COLLABORATION

- The primary reason for our HEI to outsource some MOOC services to others like private companies because they are more flexible
- Not. It is very complicated in cooperation with private companies to ensure the continuity of MOOCs
- proctoring services can be easily outsourced should some legal barriers be overcome
- partly yes, when it is the best way to invest resources
- we cannot do all inside our university
- We are already outsourcing MOOC services to our national network
- 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.
- Uncertainty about their value and the future sustainability of such a solution. It is being considered, but with great caution.
- members in federation are public HE institutions and we want to promote the public production for HE

CREATE SCALE WIRH 3rd PARTY

- attraction of new students

- visibility reasons
- 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

QUALITY

- Quality of services
- Remain in control of quality
- saves time and expenses and tightens content quality
- Quality and the fact that producing them we learn and make research as well
- Quality assurance, or lack of.
- Would not outsource for potential Quality control and Assurance issues

POLICY

- We don't have a policy on this issue.
- question for the school management
- We don't really see the infrastructure for this, yet.
- Copyright, teachers distrust.
- being public uni cannot go to private
- Specific of institution
- we offer a great new media centre for production and experience.
- we are in start position
- we see this as an in house operation the same way on campus education is.
- We are the only primary users, so currently only trying MOOCs.
- Not many MOOCs will be developed, therefore there is a substantial support within the University, being able to develop and deliver.
- we do outsource to nonprofit organisation for course production. Most likely would not outsource pedagogical choices in content as that is seen as the realm of our professoriate to determine.

OWN CONTROL

- We want to have own hands on
- We are a big institution so we can keep most services (and competences) in-house.
- 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
- We have a culture of doing things ourselves
- Currently, the approach in distance learning provision it to not outsource primary services to private companies or external players.
- We want control
- Autonomous
- give away the control about learning processes of our students

TECHNICAL

- technical solutions, multimedia support, experience
- We are more flexible in changing MOOCs and providing the support for teachers using MOOC with our own technical support.
- Only for technical hosting of our MOOC platform
- More practical trainings about technology-enabled learning
- 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.

- The university as a LMS which covers the offering of MOOCs

RESOURCES

- Resources
- Lack of human resources or expertise in a given area
- Need support resources

OTHER

- not likely
- Development of online educational infrastructure
- experience
- Collective research
- social partners
- to bring social partners
- Only for limited amount of internal skills or capabilities
- Multimedia
- Expertise, division of labour
- Moving to cloud
- If providers like NHS England want to run our MOOCs for their own cohorts

Annex 3: Barriers that prevent a mature uptake of MOOCs

Here below an overview of answers is given to the following open question: *What are the main barriers that prevent a mature uptake of MOOCs?*

FUNDING

- Lack of funding (24X)
- Funding (4X)

FINANCIAL INVESTMENTS

- financial demands
- Production cost
- Costs
- Costs and staff time.
- teachers time
- teachers afraid of costs
- Competition from USA-based initiatives (edX, Coursera, Udacity) is hard also if we compare the financial investments behind them with investments in our region.
- Business model is not mature.
- lack of economic model, we use SPOC
- Financial uncertainty
- Always funding money,
- production cost
- outreach at research universities
- Promotion and time

RESOURCES

- offering of MOOCs needs teacher resources
- lack of time of teachers to prepare thus intensive courses
- Schools not being able and unwilling to provide financial support to teachers lecturing on-line courses.
- Our institution is small and there are no initiatives and sufficient resources to develop MOOC.
- the work load it takes to design and implement them
- Resources needed for producing MOOCs.
- Lack of structure for the process, who is responsible for what and who will pay. How to compensate teacher time.
- Enabling the release of academic staff from some responsibilities to be able to spend the required time on this type of development activity.
- non clarity on how to offer MOOCs, they think putting videos makes a MOOC

SKILLS AND COMPETENCES

- attitude of teachers,
- teachers afraid of teaching innovation,
- production skillset
- lack of competencies
- Knowledge
- Shortage of technical and pedagogical expertise in offering online courses to masses,
- demand of more IT-developer but the ministry believe it is a challenge for educators.
- lack of experience among both users and creators

- lack of knowledge on MOOCs
- Teachers' motivation, it is difficult to convince them.
- partnership w/ MOOC team for better integration

EDUCATIONAL / SYSTEM CULTURE

- Educational system (7X)
- Rigid educational system
- Educational system (especially with regard to the unpredictable offering of MOOCs)
- School managements unaware of the fact the on-line course are as demanding to teach as a regular "face-to-face" class.
- Faculty distrust around the efficacy of MOOCs.
- lack of vision and perspective, bureaucracy
- Educational culture
- Cultural problems

AWARENESS

- educational system awareness
- Lack of awareness about openness in general, structural barriers
- yes, the mentality of some teachers
- academic staff viewpoint
- awareness about the possibilities of MOOCs
- unclear benefits in the eyes of many people,
- Lack of understanding, knowledge among decision makers, educators and students.
- Uncertainty about the benefits
- innocence of people
- lack of interest
- university decision makers are not interested
- lack of knowledge of the pros and cons

STUDENTS

- Cultural background of Italian students
- The students need for physical connections among the undergraduates, the lecturers competencies and the institutions' traditions
- Students needs to work "one on one" with professors.
- lack of support for students
- student has to be enrolled and passes examination – else we do not get payed for the teaching.

RECOGNITION / CREDITS

- Study awards (3X)
- Recognition (7X)
- problem of recognition
- issues about recognition of online learning,
- formal recognition.
- link to formal educational system
- no acceptance of the credits earned via MOOCs or shortage of legal procedures for recognition of prior learning
- lack of credits
- accreditation of institutions and programs

- certification and sharing verifiable credentials in more modern manners (through social media, etc.), especially blockchain based credentials in the form of Open Badges, blockcerts and our blockchain credential system : <http://digitalcurrency.unic.ac.cy/free-introductory-mooc/academic-certificates-on-the-blockchain/>
- Furthermore, ECTS credits provision in Italy is somewhat regulated with an in-presence final exam for each course.

LEGAL BARRIERS

- What is the legal framework for the on-line degree in comparison to the one received in full-time or part-time classes /How do we know WHO the student really is?/"
- Legal barriers
- The legal barriers
- Also a lack of agreements on student data is problematic within the Norwegian public law.
- data protection specially in Germany
- In Europe it is IMHO still the educational system combined with legal barriers. On the other hand MOOCs should always complement other ways of learning as MOOCs are often only "suitable" for strong self-learners.
- The only minor difficulty is Swiss privacy laws and student registration on foreign platforms. But by developing our own OpenEdX platform we can work around that."

INCENTIVES FOR INSTITUTIONS

- Lack of funding to encourage cooperation between universities
- Lack of identifying and bringing together the groups and processes that can ensure consistent use, re-use, and re-imagining of MOOC and its derivative learning products
- lack of incentives for institutions and faculty to offer MOOCs
- lack of organizational strategy that would communicate about open online education locally
- the heterogeneity of institutional approaches

STRATEGY

- it needs time to change strategies
- Lack of market pressure in European market
- Higher education in Norway is free. The increasing focus on MOOCs as business decreases the opportunities to develop this in Norway.
- No existing strategy for global education
- Especially for universities of applied sciences a lack of vision and no sense of urgency. The "what's in it for me" is not clear enough. Research I am currently doing reveals that a switch to blended learning is the topic UoAS are doing and in that context reuse of OER and MOOCs get a place, but less publishing MOOCs.
- MOOCs are mainly profiled for theoretical issues. In our university studying by doing is very important. Reasons why lecturers not use MOOCs are mostly pedagogical.
- focus on other major issues such as TEF and Brexit
- Lack of national policies and strategies
- Failure of the National Forum for the Enhancement of Learning and Teaching and the Department of Education and Skills (Ireland) to address the opportunities afforded by MOOCs - particularly the opportunity to provide greater access to further and higher education

TOWARDS ONLINE EDUCATION

- The representation of digital learning is biased by a conservative approach of many on-campus universities and by the fraudulent misconduct of some online private universities,

hence is very difficult to discuss about MOOCs and OER, since there is a general lack of recognition of the importance of these teaching/learning methods.

- MOOCs have never legalised the new form of TEL, they were used as a tool to waken up governments and administration and already did their job. Now TEL is an acceptable form of online learning which is much more proper.
- a tendency to see online education as a side issue.

INFRASTRUCTURE

- Lack of a suitable MOOC platform
- e-learning not a priority at national level
- shortage of enough technological infrastructure,
- the maturity of the development our new platform as we wait for Moodle HQ to formally launch, need to increase knowledge in the area of learning design for MOOCs.

LANGUAGE

- We are an university of applied sciences so almost all courses are being taught in Dutch. The MOOC we are planning to develop will also be in Dutch, so the Massive part is not as massive as it can be if we would choose to make the materials in English.
- Italian language is an obstacle in providing an Italian MOOC ecosystem (it's not spoken in the rest of the world as English, French or Spanish are).

QUALITY

- Lack of focus on quality in education
- concerns on quality

OTHER

- "I don't see real barriers. Some of our MOOCs have been adopted in the curriculum according to the 'flipped classroom' model. Other MOOCs are supplemental, or for specific interest groups.
- luck of experience in creation of MOOC
- Specific of institution
- It's not the priority of my institution.
- Slovenia is a rather small country, with short distances between cities, or rural communities
- Availability of existing MOOCs for re-use within a course (timing is the real issue).

Annex 4: What would boost the use/uptake of MOOCs in your region

Here below an overview of answers is given to the following open question: *In your opinion, what would boost the use/uptake of MOOCs in your region?*

DEDICATED FUNDING OPPORTUNITIES

- Funding (7X)
- Appropriate funding
- Lack of funding
- Better funding
- Funding opportunities
- Funding should be allocated to project that experiment with MOOC pedagogy.
- Targeted funding programmes,
- An open production house funded by EU or national government would help.
- Some plans, for specific categories, supported by regional funding (MOOCs in Italian for disadvantaged people such as, for instance, Italian lessons for a large number of immigrants from Latin-America, but it is just an example).
- Some special project/grant focused on MOOC creation.
- Availability of Government funding. Currently there is little or no funding in Ireland for online education - let alone MOOCs.

POLICY SUPPORT

- encouragement of the Higher Education Council
- Provincial or federal awards for universities to work together on the MOOC.
- A policy for recognizing efforts done by teachers developing MOOCs in terms of career
- A strong national political strategy on higher education and e-learning (also MOOCs and OERs). May be the EU could stimulate national governments.
- National guidelines.
- More clear state Strategy according ideas of documents of European Digital Agenda
- Laws that enhance the use of MOOCs at different levels, I have noticed that people in Italy often move if they are obliged to. This sounds sad, but it is a trend I have been observing (as it is for Open Access)
- "Use of: if all HEI's would publish their materials with a CC license so that it become easier to reuse the material
- Policies

COLLABORATION BETWEEN INSTITUTIONS

- Building networks among different institutions
- Partnering with other institutions in production of MOOCs. Otherwise it is an enormous task in production to do it with a very small team.
- Formal collaboration/value constellation by many HEIs, who would agree on producing and running MOOCs and who would also agree upon the institutional standards, policies and procedures for "virtual student mobility".
- Cooperation between institutions (we already have some MOOCs that are already running or are being designed in cooperation with other institutions regionally or nationally).
- Collaboration between UC's to increase the quality og numbers of MOOCs
- Greater involvement of other public bodies.
- Strategic and systematic support on the institutional level, meaning, establishment of a support center for and beyond MOOCs at the University.

INTEGRATION REGULAR EDUCATION

- Strong alignment between the formal institutional system (org. as a system), including student administration etc., and the borderless, open and shared virtual HEI-domain, is one key success factor.
- A best coordination with classical online education for production and reuse educational resources
- A closer integration with the on campus education.
- MOOCs use during studies on individual subjects.
- Acceptance of courses / outcomes / validation.
- I think the administration support
- Good management in terms of obligatory MOOCs for all students on campus
- changes in educational systems/management,

RECOGNITION / CREDITS

- Recognition of MOOCs (4X)
- Recognition of the credits, batches, or just learning via MOOCs
- Possibility of earning credits.
- credit
- Credential
- Official adoption of MOOCs as for-credit education
- Distance exams for credits acquisition
- Acceptance of courses / outcomes / validation.
- accreditation for MOOC courses and new assessment procedures (peer assessment is not accepted for example).
- awarding of credits

GENERAL AWARENESS RAISING / MARKETING

- good examples
- Knowledge how to use MOOCs.
- Sharing ideas
- The well-known and worldwide practice.
- Good experiences in our pilot-MOOC
- Awareness about MOOCs would need to be increased
- more wide-spread dissemination,
- The knowledge of the initiatives
- examples
- Dissemination of information
- More Marketing, always more marketing
- marketing and promotion
- greater dissemination of information about existing MOOCs
- MOOCs promotion
- We need to increase the reputation of online learning first.

INCREASING AWARENESS MANAGEMENT / POLITICS

- university directors open to MOOCs
- A different approach to the issue by senior management, who are uncertain about the nature and value of online education.
- Educational system awareness
- Management and politicians must obtain knowledge on MOOCs and their possibilities and limitations.

- Greater understanding of the field at top level. Issue of openness needs to be addressed.
- A project explaining school managements what it is about.

KNOWLEDGE OF MARKET

- Demand from students
- Knowledge about the students preferences
- more experience with MOOCs from the learner point of view
- Support offered for potential students
- MOOC useful for wide use

BETTER MOOC OFFERING TO MARKET NEEDS

- Relevance to market
- We need to offer more and more flexible learning opportunities
- Some degree of relationship with public employment training
- Development of a real postgraduate learning market
- MOOC Education becomes necessary
- Better curriculum design
- Shorter MOOCs would be cheaper and less workload intensive and still give value to learners
- teachers create good courses
- preparation of some good quality and popular courses
- offer quality courses
- Interesting MOOCs
- The redesign of MOOC pedagogy around the 'original' learning theory of 'Connectivism' (Siemens and Downes)
- an innovative didactic approach being at the same time more appealing and more effective if compared to the major providers.

LANGUAGE / CONTEXTUALISATION

- Better language skills
- good skills of foreign language
- Swedish-language availability.
- national language MOOC
- MOOC in national language;
- More offerings that are appropriate to our Southern Africa context.
- LMTA area is very specific
- Uptake: We are a regionally located University so we will not make a MOOC to reach business or promotional targets. We are focussing on the pedagogical innovation and by offering more flexible education.

PORTAL/PLATFORM/INFRASTRUCTURE

- Strong national platform
- Dedicated Swiss platform for MOOCs
- More comprehensive portals/lists of MOOC-offering to support study planning
- The availability of nationally recognized, credit-bearing MOOCs.
- we're not focused on a single region. Internet accessibility for the developing world and mobile friendly MOOCs would arguably increase uptake, especially in topics that students consider a certificate or credential to be of professional value

BUSINESSMODELS MOOCs

- Evidence of their utility in boosting recruitment/income.

- Knowledge about the beneficial economic and pedagogical approach.
- clearer return on investment
- A sustainable business model
- Economic rewarding for teachers

SKILLS TRAINING

- A fundamental change in faculty professional development that leads to engagement with digital learning and digital culture"
- special trainings for teachers
- Education, training,
- Innovations of teachers' adult education as well as youth one will boost innovations anywhere

OTHERS

- We do not need to use MOOCs to reach educational goals.
- Nothing - we have MOOC saturation, I think they've reached their audience
- Implementing new models for education seem to have the largest boost in changing practices in a structural way, or a straight and clear policy. Both approaches do need time to have their effect.
- And again, it is not only about MOOCs, but broader publishing and reusing educational resources.
- Smaller institutions with more flexibility, making it easier to experiment

Annex 5: Topics seen as highly interesting for those potentially left behind

When indicated that their institution offers MOOCs on topics that are highly interesting for those potentially left behind, the respondents came up with the following examples:

- Wellbeing counselling, e-health
- Global health
- Healthy ageing
- Dementia, cyber security, age related falls
- Health, Skills Shortage, National learning priorities
- Civic rights, gender differences and equality, basic health, technology, language skills
- Project management (17+ course units)
- Investigating academic support courses
- Dino 101, Mountains 101, Introduction to the Arctic: Climate Change
- Our HEI are interested in teachers for social inclusion (unemployed, persons with disabilities, migrants etc.
- CPD MOOC for the teachers
- Entrepreneurship
- We are planning to offer a MOOC on study skills (targeted mainly for our potential and/or selected students, but open for anyone interested)
- Learning to learn, Introduction to digital scholastic publishing
- digital accessibility
- Learning to learn
- learning to learn, basic maths,
- Precalculus
- Introduction to Mathematics, free language courses for Italian and Arabic language.
- Service Learning, Law, Pedagogy
- College drop-out, social security, climate MOOC, refugees, elderly people
- basics of law, family law, business and law, property and commercial law
- the global Unbanked, remittances senders (immigrants, etc.), high inflation country citizens and more
- Basic English communication, document literacy
- ICT
- Fundamental sciences and medicine
- From basic science to medicine.
- Biomedical topics
- see: <http://moocs-afrique.epfl.ch/fr/>
- Environmental natural resource management
- A MOOC called "Head Start Online" to help people make the successful transition to higher education for the first time
- Web development, careers

Annex 6: Questionnaire

Comparing institutional MOOC strategies (2016)

Introduction

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>).

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.

The reports of the 2014 and 2015 surveys are available on the HOME website (<http://home.eadtu.eu/results>) that initially supported the development of this survey. This survey is now continued as part of the MOONLITE project, co-funded by the European Commission, DG EAC, under the Erasmus+ Programme in close cooperation with other projects like SCORE2020 and BizMOOC.

You are encouraged to complete the questions even if your institution decided not to offer MOOCs (yet). Please complete this survey only if you are familiar with the reasons why your institution is or isn't involved in MOOCs.

This questionnaire has 11 sections and will take about 15-20 minutes to complete.

Closing date is 31 December 2016



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Profile Information

Full name of Institution

Country of institution *

Type of institution (Finance) *

- Mainly publicly financed
- Mainly privately financed
- Mixed

Type of institution (Education) *

- Mainly online/distance provision
- Mainly on campus provision
- Mixed

Total number of students enrolled at your Institution

Your name

Your email address

Your position at the Institution

Status of MOOC offerings at your institution*

My institution

- will not be adding a MOOC
- has not yet decided about a MOOC
- is planning to add MOOC offering(s)
- has MOOC offering(s)

Total number of MOOCs offered by your institution (from 2012 until now)

URL to your MOOC offerings (optionally, only for those HEIs that already offer MOOCs)

MOOC platform that you use (optionally, only for those HEIs that already offer MOOCs)

- we are involved in one of the big MOOC platform providers (e.g., edX, Coursera, FutureLearn, Miriada X, etc.)
- we are collaborating on a MOOC platform in our own regions/country (e.g., FUN)
- we have installed one of the open source (MOOC) platforms at our HEI (e.g., Moodle, OpenedX, OpenMOOC, etc).
- we have developed our own dedicated institutional MOOC platform

My institution (re-)uses existing MOOCs for students in continuous and/or degree education Y/N

My institution is developing MOOCs to be re-used by other institutions Y/N

What should be the main target group for MOOCs?

- Full-time students enrolled at your university
- Part-time students enrolled at your university
- People without access to the traditional educational system
- Further education students (lifelong learners - CPD)
- Students from other universities



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- MOOCs are for everybody, not for specific target groups
- Other:

Your opinion on the following statements

(same questions as in the US studies)

MOOCs are a sustainable method for offering courses*

- Disagree
- Neutral
- Agree

Credentials for MOOC completion will cause confusion about higher education degrees*

- Disagree
- Neutral
- Agree

How well are MOOCs meeting your institution's objectives?

- Too early to tell
- Meeting very few
- Meeting some
- Meeting most/all

MOOCs are important for institutions to learn about online pedagogy

- Disagree
- Neutral
- Agree

Primary objective for your institution's MOOCs*

(or what would be a primary objective if you are planning to offer a MOOC in the near future)

Same question as in the US studies

- Generate Income
- Increase Institution Visibility
- Reach New Students
- Drive Student Recruitment
- Innovative Pedagogy
- Flexible Learning Opportunities
- Learn About Scaling
- Explore Cost Reductions
- Supplement On-campus

Comments on primary objective

For example elaborate on your choice or put forward ideas just in case your primary objective is not covered by the list above.



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Relative importance of the following objectives for your institution's MOOCs

(or if you are planning to offer a MOOC in the near future)

Using MOOCs for financial reasons

(e.g., reduce costs, generate additional income)

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

Using MOOCs for reputation / visibility reasons

(e.g., student recruitment, marketing potential / reach new student)

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

MOOCs as innovation area

(e.g., improve quality of on campus offering, contribute to the transition to more flexible and online education, improve teaching)

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

Responding to the demands of learners and society

(e.g. responding to the demand of open education in society)

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution



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Please add other important objectives for your institution's MOOCs
(or if you plan to offer one)

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How important are the following macro-drivers for offering your institutional MOOCs?

(or if you plan to offer a MOOC)

MOOCs are new educational methods in a 7 trillion dollar industry. MOOCs and Open Education as such is big business

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

MOOCs are seen as a method to reduce the costs of higher education (both for institutions and government)

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

MOOCs are a new form to educate the many

MOOCs provide a solution to the increasing need for (accessible and affordable) higher education and to accommodate additional 98 million students for the next 10 years

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

MOOCs are needed for the flexible demand for (e-)skills and jobs

MOOCs provide flexible, innovative learning approaches and delivery methods for improving the quality and relevance of higher education. Aiming to develop the right mix of skills : transversal competences, e-skills for the digital era, creativity and flexibility and a solid understanding of the field being studied.

	1	2	3	4	5	
Not at all relevant for my institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highly relevant for my institution

MOOCs are an essential part of the continuous technical innovation in education

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MOOCs innovate by e.g. using ICT for digitalizing education content, mass distribution and personalized learning and reducing costs.

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

Improving the quality of opportunities for learning

Quality is (increasingly becoming) an important driver in open and online education. With an increasing offer of MOOCs the quality dimension will become more important as well.

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

MOOCs provide new business models based on 'free'

For example in a freemium business model a free tool promotes reputation and create monetizable activity, etc.

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

The openness in MOOCs is seen as an important step to enhance the circulation of knowledge in society

Open access in scientific output has already proven to be sustainable and profitable for society. OER from the world's top universities have been available to everyone, free of charge, for over a decade. And open education is seen as the next essential, integrated step enhancing the circulation of knowledge and increasing the pace of innovation.

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

MOOCs are part of an increasingly global education market, for example to attract the best international students

1 2 3 4 5



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Not at all relevant for my institution Highly relevant for my institution

MOOCs accelerate the unbundling of education and consequently collaboration on shared services increases as well

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, LMS/MOOC-platform, exams, learning analytics services, etc.

1 2 3 4 5

Not at all relevant for my institution Highly relevant for my institution

Stimulation of the use/uptake of MOOCs

Collaboration between European HEIs, governments and civil societies seems to accelerate the development, delivery as well as the use/uptake of MOOCs. But this seems to differ between countries and regions.

Are there any policies and strategies in your region regarding MOOCs?

If yes, could you please describe them and provide information about this? Do you participate in this? If not, what are the main reasons why such a policy – strategy is not in place? Examples of such policies are: regional or governmental initiatives that promote the development and/or use of MOOCs ; specific frameworks for MOOCs as part of a systemic policy for OER or Open Education, etc.



What are the main barriers that prevent a mature uptake of MOOCs?

E.g., the educational system, lack of funding, study awards, recognition, legal barriers, etc.



In your opinion, what would boost the use/uptake of MOOCs in your region?



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Collaboration on MOOC offerings

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?

	I am not qualified to answer	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Design and development of MOOC materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Co-creating MOOCs with other institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sharing and re-using of (elements of) MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support on licensing-copyright-copyleft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality assurance framework	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Authentication, proctoring and certification services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognition of each other's MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Co-creating cross institutional programmes (e.g., micromasters, nanodegrees)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Translation services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collective research, e.g., by pre-/post surveys	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoting MOOC offerings on a (worldwide) portal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing and branding of MOOC offerings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development/use of a MOOC platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Additional support services for MOOC participants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Collaboration with other HE institutions

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



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

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



Organisation of support services

MOOC support in the development and use/uptake from MOOCs

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
can easily be provided by each HEI separately	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
is best to be done by collaboration in a regional/national support centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
is most effectively facilitated by a European MOOC consortium	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
is best dealt by a global market player	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

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Identification of opportunities and barriers for recognizing MOOC-based learning

It is essential to offer a formal (ECTS) credit next to more informal certificates like for example a certificate of participation.

1 2 3 4 5

Strongly disagree Strongly agree

These formal (ECTS) credits should be recognised in formal bachelor/master programs of the institution that offers the MOOC

1 2 3 4 5

Strongly disagree Strongly agree

In addition these (ECTS) credits should be recognised by other HEIs as well (e.g., as part of joint programs or virtual exchange)

1 2 3 4 5

Strongly disagree Strongly agree

What are, in your opinion, the opportunities for recognizing MOOC-based learning

What are, in your opinion, the barriers for recognizing MOOC-based learning

MOOCs for opening up education

MOOCs started with the promise to open up quality education for all. Open Education has many dimensions (see for example UNESCO-COL publication | <http://bit.ly/2bAQX8L>). One dimension is related to those potentially left behind and as such are related to using MOOCs for social inclusion (for example targeting unemployed, persons with disabilities, migrants and refugees). However, by now it's recognised that special measures are needed to make educational offers like MOOCs suitable for those target groups.

What kind of measures for opening up education to those potentially left behind, are in your opinion, essential?

HEIs should develop a policy to open up their educational offer to those potentially left behind

1 2 3 4 5

Strongly disagree Strongly agree

Collaboration with NGOs and civil society organisations is essential to guarantee the use of MOOCs to those potentially left behind

1 2 3 4 5

Strongly disagree Strongly agree

My institution delivers MOOCs on topics that are highly interesting for those potentially left behind

Y/N

If yes, these topics are...