



MOOC status in European HEIs - with special reference to opening up education for refugees

Status report based on a mapping survey conducted in April – June 2019

August 2019

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Published by: European Association of Distance Teaching Universities, The Netherlands



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Suggested citation

Kluijfhout, E., Henderikx, P. & Ubachs, G. (2019): *MOOC status in European HEIs - with special reference to opening up education for refugees. Status report based on a survey conducted in April-June 2019.* EADTU. Retrieved from <https://bit.ly/2Zs8SRH>

ISBN 9789079730490

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Disclaimer: This research is conducted and produced as part of the [MOONLITE](#) Project (2016-1-ES01-KA203-025731). This project is supported by the European Commission, DG EAC, under the [Erasmus+ Programme](#). The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



Co-funded by the
Erasmus+ Programme
of the European Union

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Executive Summary

This report presents the results of an online survey amongst European Higher Education Institutions (HEIs) conducted in the period April-June 2019. The full report is available at <https://bit.ly/2Zs8SRH>.

This survey is part of a series of surveys conducted annually by EADTU since 2014, though this year's survey has a somewhat different structure than the previous surveys, with specific emphasis on the topics of recognition and accreditation of MOOCs, and on refugees as a target group for MOOCs.

The survey comprises of seven sections: profile information; the present uptake of MOOCs at European HEIs; re-using MOOCs; institutional strategies for the development and delivery of MOOCs; strategies to boost the development and uptake of MOOCs; recognition and certification of MOOCs; and strategies to promote MOOCs for opening up education to refugees.

Sample information

A sample of 96 HEIs from 20 countries forms the basis for this report, with more than half of the respondents holding (senior) positions directly related to ITC, e-learning and/or MOOCs. Of the total sample of 96 institutions, large sub-samples are from Turkey (31 HEIs) and from France (29 HEIs). In case there are marked differences between the overall sample and the sub-samples, this is reported.

The large majority of responding institutions is publicly financed, as was the case with the surveys in previous years. Over half mainly provide on-campus education, while one-third are mixed-mode institutions. This year's sample contains more mixed-mode institutions, mainly among the French and Turkey institutions, than the 2018 survey.

The largest share of institutions (36) enroll 30.000 or more students. Twenty-one institutions enroll 15.000-29.999 students, twenty-three enroll 5.000-14.999 students, and sixteen less than 5000 students. This distribution is similar to that of the 2018 survey.

Overall the institutional profiles are similar to those of the 2018 sample, although the sub-samples from Turkey and France somewhat differ from the overall sample: they contain relatively more small institutions¹ and more often offer a mix of on-campus and online education than HEIs in the overall sample. Turkish HEIs are more often privately funded, while French institutions are more often publicly funded than in the overall sample.

Status of MOOC offering

Overall three-quarters of the institutions are already offering MOOCs, with another five institutions in the process of developing one or more MOOCs right now. Only six institutions in the overall sample do not intend to offer any MOOCs, neither now nor in future. MOOC uptake differs considerably between the sub-samples: of the French HEIs 90% is offering MOOCs, while for the Turkish sub-sample this is 32%.

When comparing this year's numbers to those of the previous surveys, the annual growth in institutions offering MOOCs again continues this year. Further growth in the uptake of MOOCs is especially possible in the Turkish sub-sample, with indeed almost half of the sample indicating they are either in the process of developing MOOCs (7%) or are planning to do so in future (39%). In the rest of the sample the adoption of MOOCs is close to stabilization, taking into account the number of

¹ One of the largest HEIs however is also from Turkey, Anadolu university, which is mandated as the national provider for distance education.

institutions already offering MOOCs and those in the process of developing these (83% together) and 9% with no intention to offer MOOCs whatsoever.

The further uptake of MOOCs could still be realised by increasing the number of MOOCs offered per institution. The numbers to support such a possible trend are mixed however. Of the institutions already offering MOOCs in this year's survey, more than half currently offer between 1-10 MOOCs, while ten institutions offer 11-20 MOOCs, nine offer 21-30 MOOCs, and three offer over a hundred MOOCs. When compared to last year's survey, the percentage of institutions offering 1-10 MOOCs has remained constant, with considerable growth in the percentage of institutions offering 11-30 MOOCs, but with a decrease in the percentage offering more than 30 MOOCs.

The majority of institutions offering MOOC(s) offer these through one of the large international platforms (edX, Coursera, FutureLearn, Miriádx, FUN etc.). The use of institutional platforms (e.g. Moodle, OpenedX) comes second. National/ regional platforms and especially locally developed platforms are less popular. Eight institutions deploy more than one platform, usually next to one of the large international platforms. The relative importance of the large international platforms is even higher for the French sub-sample (25 out of 29 use these), while in the Turkish sub-sample seven out of the nine institutions already offering MOOCs offer these through existing software installed as the institutional platform (e.g. Moodle, OpenedX).

Compared to last year's survey the adoption of the large international platforms has increased considerably, from 31% then to 67% now, with a corresponding decrease in the use of locally installed open source platforms and in-house developed platforms. The percentage of national/regional platforms has slightly risen (from 5% to 13%), but due to low numbers it is not clear whether this indeed is part of a trend.

Re-use of existing MOOCs

Of the 59 institutions already offering MOOCs 19 only offer MOOCs they developed themselves while 32 (also) offer MOOCs developed by others. This is similar to the ratio in last year's survey. These MOOCs are mainly offered as part of continuous education, and to a somewhat lesser degree as part of a Master programme or Bachelor programme. Of the institutions offering MOOCs, 27 indicate that their MOOCs are re-used by others.

When asked whether institutions are also willing to integrate MOOCs taught in another language, there is a marked differences between the different sub-samples. Overall 41 institutions indicate they are willing to do so, while 38 indicate they definitely are not willing to do so. Of these 38 institutions 25 are from the Turkish sub-sample, and nine from the French sub-sample. From the remaining institutions (the other European countries) the large majority is willing to integrate foreign-language MOOCs. Slightly less institutions are prepared to integrate foreign-language MOOCs after translation, or to integrate foreign-language MOOCs as an elective.

Thus half of the institutions already offering MOOCs also include MOOCs developed by others, most often as part of their continuous education offering. The re-use of MOOCs *from* others is mirrored by the re-use *by* others. Whether the MOOC is taught in a foreign-language does not make a difference in the willingness to integrate that MOOC or not. Institutions seem somewhat less keen on translating such foreign-language MOOCs before offering them, or to offer them as an elective. Overall Turkish and French HEIs are less likely to include MOOCs from others and foreign-language MOOCs (whether in their original language or as a translated version) than HEIs in the rest of the sample. As the surveys of previous years did not contain questions on the (re-)use of foreign-language MOOCs, no trend analysis is possible on this issue.

Institutional strategies for the development and delivery of MOOCs

Almost all institutions presently offering MOOCs do so as ‘open education’ for the general public (49 out of the 59). The majority also offers MOOCs to their Degree students (35) and continuous education students (32). Institutions offering MOOCs for the general public remarkably often combine this with offering MOOCs for continuous professional development (30 institutions).

Eleven institutions offer MOOCs to disadvantaged groups specifically. Those eleven institutions all offer 10 or more MOOCs and tend to offer MOOCs to (almost) all the other categories of learners as well. Disadvantaged groups thus do not seem a strategic target group for HEIs in their MOOC offering.

Raising institutional visibility is still the most important motive to offer MOOCs. Other important motives are experimenting with innovative online pedagogies and enriching continuous professional development.

The least important motive to develop and offer MOOCs is to generate income. This low score reconfirms similar results found with the previous 2014, 2015, 2016, 2017 and 2018 surveys. This seems to contrast with the trend (Class Central 2017) of the ‘shrinking of free’ of MOOC offerings. This is thus not confirmed for our sample, possibly due to the fact that the large majority of our sample comprises of publicly financed institutions.

The motive to reaching out to disadvantaged groups through MOOCs is a special case. For the Turkish sub-sample this is the most important motive, while for the French sub-sample this is the two-but-least important motive.

When asked for the main barriers that prevent the development of MOOCs within one’s institution, the lack of staff availability scores highest. For Turkish HEIs this seems directly linked to the lack of staff competences and the lack of specialized staff support. For the rest of the sample the lack of staff competences and specialized staff support is somewhat less of a barrier, but instead is the lack of funds a relatively important barrier. Most likely this lack of funds for these institutions is directly linked to the staffing issue, as ‘Lack of support from management’ for this group scores relatively low, indicating that the staffing issue is not the result of management deprioritizing MOOC development, but that real financial restrictions lead to low staff availability for MOOC development.

Well over half of the institutions are prepared to develop MOOCs in a foreign language to reach out to other countries; about a quarter is not prepared to do this, and the rest does not know. This willingness to develop MOOCs in a foreign language thus is matched by the willingness to integrate foreign-language MOOCs in one’s own offering (see above under the previous section on re-use of MOOCs).

National strategies for the development and delivery of MOOCs

There are major differences between the sub-sample when it comes to national strategies/policies, barriers, and possible measures to boost the development and delivery of MOOCs.

On the availability of a national policy/strategy to promote MOOCs, the large majority of French respondents (77%) indicates that such a national policy/strategy exists and is implemented by their Government. Many Turkish respondents either indicate no such national MOOC policy exists (45%), or they are not sure (42%). Of the remaining countries, 72% of respondents indicate that no such policy/strategy exists or they are not sure (14%). Except for France no national policies/strategies to promote MOOCs thus seem to be (effectively) implemented.

To boost the development of MOOCs, first of all an accepted policy on credits and recognition is required, closely followed by a central funding mechanism. Interestingly, the importance of an accepted policy on credits and recognition is equally important for the French institutions, although the responses on the existence of a national MOOC strategy/policy above seems to indicate that such a national policy/strategy does exist and has been implemented. This French national MOOC policy/strategy thus seems to exclude a solution for the recognition and accreditation of MOOCs.

A central staff training initiative for the development and delivery of MOOCs is especially important to the Turkish sub-sample, which confirms the earlier finding that lack of staff is considered a major barrier to the development of MOOCs by Turkish HEIs.

Both in Turkey and France a *national* MOOC platform is expected to boost the development of MOOCs more than in the rest of Europe. In view of the earlier finding that most French institutions currently deploy one of the large international platforms, this call for a national platform seems to indicate some dissatisfaction with the international platforms currently in use. Interestingly, in the Turkish sub-sample most institutions use existing software (e.g. Moodle, OpenedX) installed locally as the institutional platform, but also here the provision of a national platform is expected to boost MOOC development.

Recognition of MOOC-based learning

Findings under the previous section already identified (the lack of) recognition of MOOC-based learning as somewhat of a barrier to the development of MOOCs in one's institution, while an accepted policy on credits and recognition is considered a major boost to the development of MOOCs in one's country.

Here respondents consider the option to formally reward credits for MOOCs to be highly relevant, not only for students asking for such a formal reward, but as a general principle for all students. Devising a common framework through which to offer formal credits for MOOCs thus could be a major incentive to the development and uptake of MOOCs.

But will an (inter)nationally accepted method for awarding formal credits to MOOCs also lead to the recognition of those credits by other institutions? On this issue we see a marked difference within Europe. From the French and Turkish institutions a quarter is willing to recognize such credits in either Degree programmes, while for the rest of Europe this is over 50%.

When asked to score various support measures to support recognition, the most interesting fact is the high scores on all proposed measures. The recognition of MOOC-based learning thus seems to be a really pressing issue, with as most important measure the possibility to award formal (ECTS) credits to a MOOC. This is closely followed by building a national framework and giving an award with formal (ECTS) credits to a MOOC. Awarding certificates of attendance (without formal assessment) scores somewhat lower but is still considered relevant.

MOOCs for opening up education to refugees

The last section of the survey investigates the (potential) role of MOOCs for refugees, which is an important topic of the MOONLITE project under which this survey was conducted. The responses to previous questions under the section 'Institutional strategies' (see above) already indicated that few institutions specifically target disadvantaged groups with their MOOC offering.

This is further confirmed here with half of the 50 institutions presently offering MOOCs indicating that these MOOCs are not relevant for refugees. The other half mostly list their introduction courses

to various academic topics as relevant to refugees. Only a few institutions, already offering MOOCs to various target groups, report offering MOOCs specifically targeted towards refugees.

Next to the actual offerings for refugees, we also asked about the potential to offer MOOCs that are interesting to refugees. The 25 institutions that above indicated they already do offer MOOCs interesting for refugees all reconfirmed this here. Of these, about two-third listed the same topics they are presently offering, thus indicating they intend not to offer MOOCs interesting for refugees on more topics than they already do.

When asked which measures can contribute to opening up MOOCs for refugees, the most interesting finding is probably that all options score about the same, and only just above average. This either indicates that respondents have no firm opinion on the issue, or that it is not considered very pressing. This seems further corroborated by the fact that 20 respondents did not answer this question at all (while non-responses on other questions were minimal).

Introduction

This report presents the results of an online survey amongst European Higher Education Institutions (HEIs) conducted in the period April-June 2019. The full report is available at <https://bit.ly/2Zs8SRH>

This survey is part of a series of surveys conducted annually by EADTU since 2014, though this year's survey has a somewhat different structure than the previous surveys, with specific emphasis on the topics of *recognition and accreditation* of MOOCs, and on *refugees as a target group* for MOOCs. This shift in emphasis is motivated by the [MOONLITE](#) project which focuses on these topics, and under which this year's survey is conducted.

The MOONLITE project – *MOOCs for Social Inclusion & Employability* – 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

An online survey instrument was used to collect the data from Higher Education Institutions in Europe as presented and analysed in this report. This survey is part of a series of surveys conducted annually by EADTU since 2014, though this year's survey has a different structure with specific emphasis on the topics of recognition and accreditation of MOOCs, and on refugees as a target group for MOOCs.

The European Higher Education Institutions (HEIs) were initially approached by email, with subsequent announcements in the EADTU newsletter and through social media to generate additional responses.

The survey comprises of seven sections, with a mix of open, multiple-choice, multiple-response, and Likert scale (1-5) type of questions:

1. Profile information: Institutional- and respondent information.
2. Status of MOOC offerings: status, number of MOOCs offered, and platform(s) used.
3. Re-use of existing MOOCs: actual re-use and the issue of foreign-language MOOCs.
4. Institutional strategies for the development and delivery of MOOCs: target groups, motives and barriers, and the language issue in developing MOOCs.
5. National strategies for the development and delivery of MOOCs: present strategies and required policies.
6. Recognition of MOOC-based learning: present status and required policies.
7. MOOCs for opening up education to refugees: present status and required policies.

The full survey is contained in Annex 1.

Of the total sample large sub-samples are from Turkey and from France. Therefore, next to the total sample, sub-samples were created for the Turkish and French HEIs. For every question of the survey the possible differences between the overall sample and these sub-samples were compared, and in case clear differences were found these were reported.

Sample information: institutional profiles and respondents

In total 106 respondents from twenty countries² returned the survey. After filtering out a number of double entries and non-HEI institutions, a sample from 96 institutions remained to form the basis for this report.

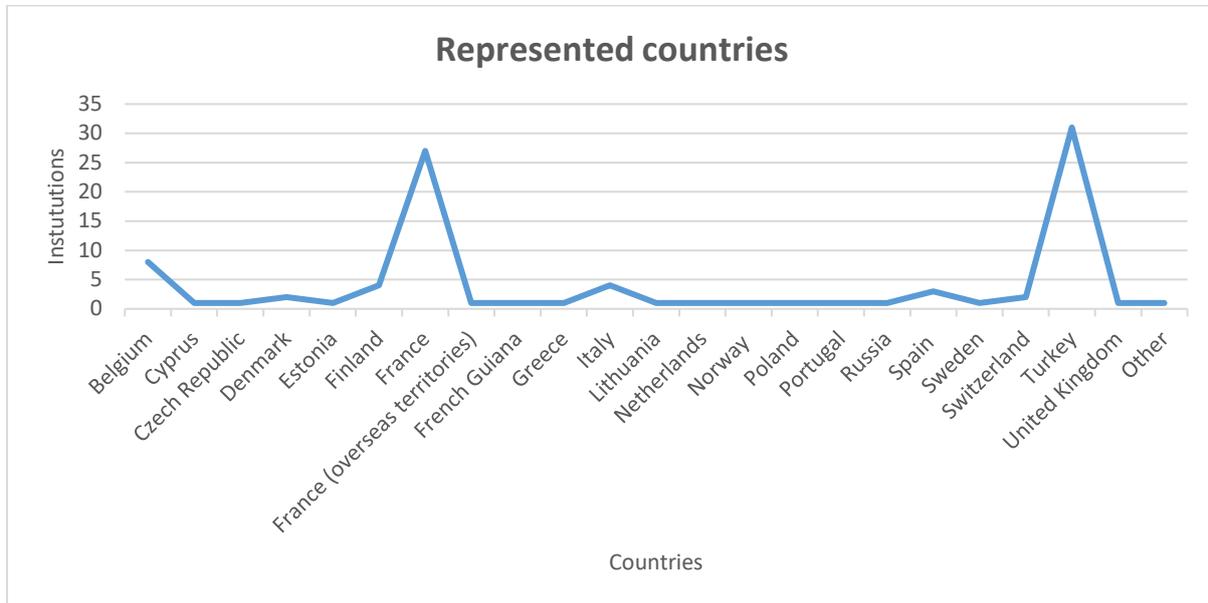


Figure 1: Number of HEI respondents per country

More than half of the respondents occupy positions directly related to ITC, e-learning and/or MOOCs. Most of these are senior staff, at the level of director, manager or unit head. The remainder of respondents hold a wide range of positions: professors, lecturers, researchers, policy advisors,

Of the total sample of 96 institutions, large sub-samples are from Turkey (31 HEIs) and from France (29 HEIs). As indicated above, in case there are marked differences between the overall sample and the sub-samples, this is reported.

² 'France', 'France overseas territories' and 'French Guiana' are grouped together as 'France' in the remainder of this report.

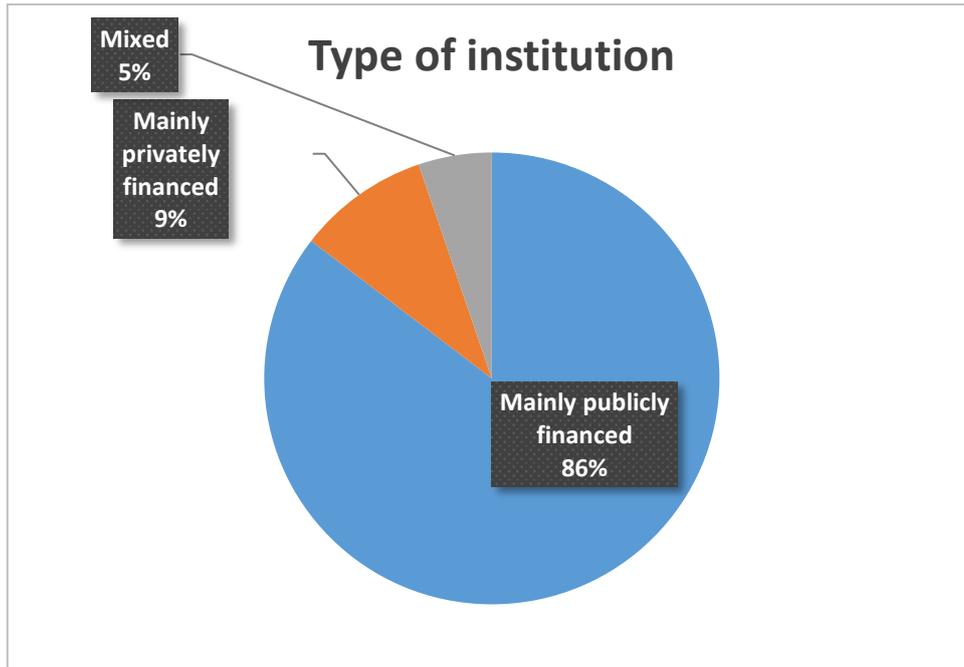


Figure 2: Institutional funding

The large majority of responding institutions is publicly financed (82), while nine institutions are privately funded and five institutions receive mixed funding. This distribution is very similar to the samples of the previous two surveys (2017 and 2018).

Most of the privately funded HEIs are part of the Turkish sub-sample (7 out of the total 9) where these privately funded HEIs form almost a quarter of the sub-sample. Of the French institutions all but one are publicly financed.

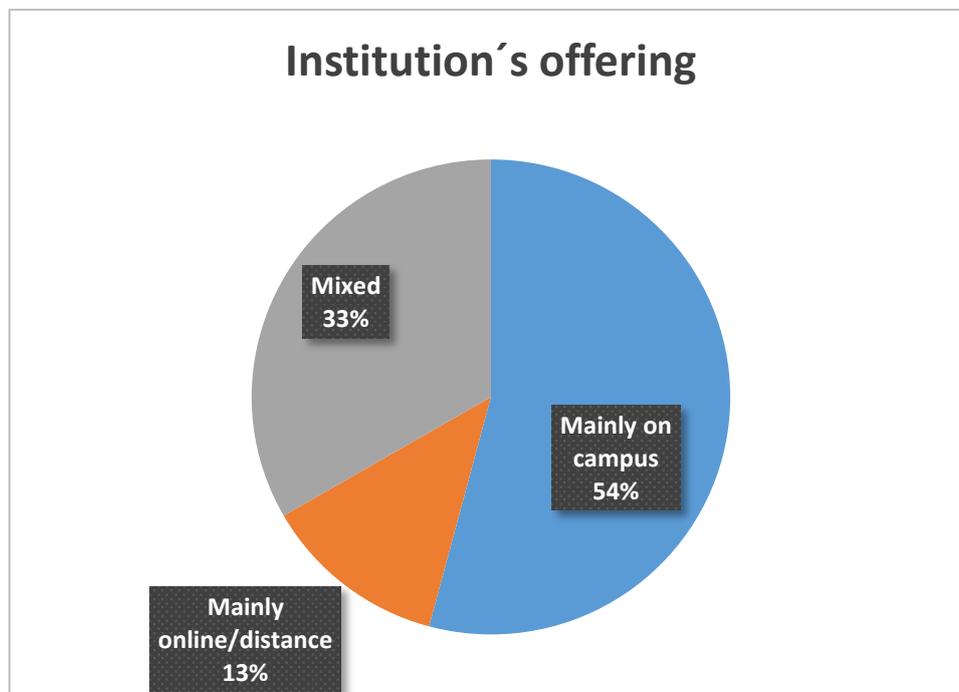


Figure 3: Institutional offerings

Over half of the institutions mainly provide on-campus education, while 33% are mixed-mode institutions. This year’s sample contains more mixed-mode institutions (33%) than the 2018 survey (17%). The share of distance teaching institutions (13%) is similar to that of last year.

In both the Turkish sub-sample and the French sub-sample the share of mixed-mode HEIs is somewhat larger (39% and 40% resp.) In the Turkish sub-sample this is at the cost of campus-based HEIs, while the French sub-sample contains only one distance teaching institution.

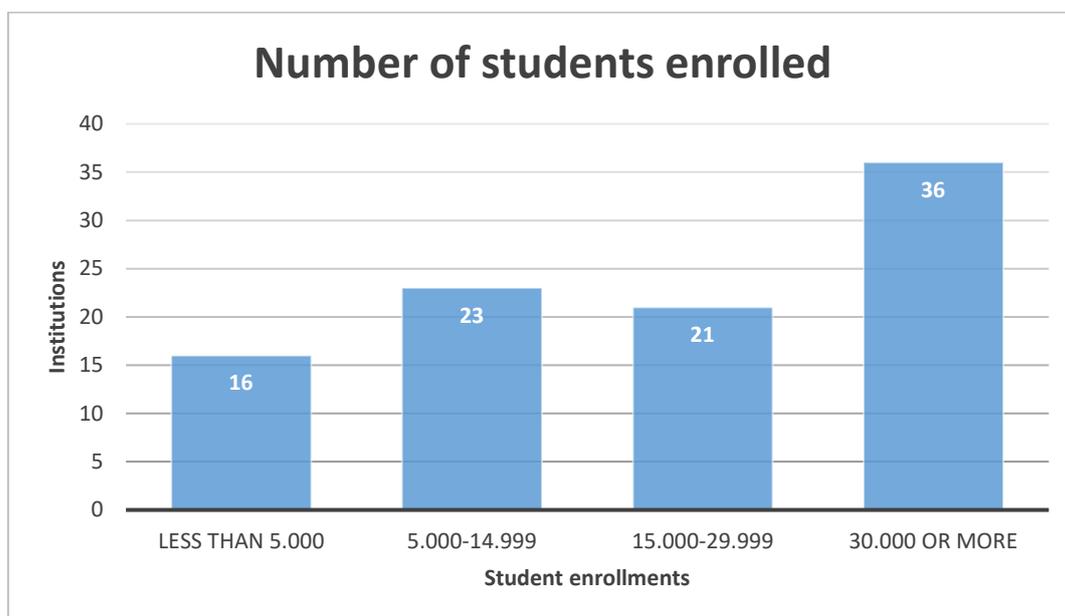


Figure 4: Enrollment figures

The largest part of institutions (36) can be considered ‘large’ HEIs as they enroll 30.000 or more students. Twenty-one institutions enroll 15.000-29.999 students, while another twenty-three enroll 5.000-14.999 students. Of the remaining sixteen smaller institutions (less than 5000 students), 8 are from the Turkish sub-sample³ and eight from the French sub-sample. This distribution is similar to that of the 2018 survey.

Overall the institutional profiles are similar to those of the 2018 sample. The sub-samples from Turkey and France contain relatively more small institutions and more often offer a mix of on-campus and online education than HEIs in the overall sample. Turkish HEIs are more often privately funded, while French institutions are more often publicly funded than in the overall sample.

Status of MOOC offering

In this section we investigate the status of MOOC adoption by looking at the number of institutions already offering MOOCs; the number of MOOCs offered by these HEIs; and the MOOC platform(s) they use.

³ One of the largest HEIs however is also from Turkey, Anadolu university, which is mandated as the national provider for distance education.

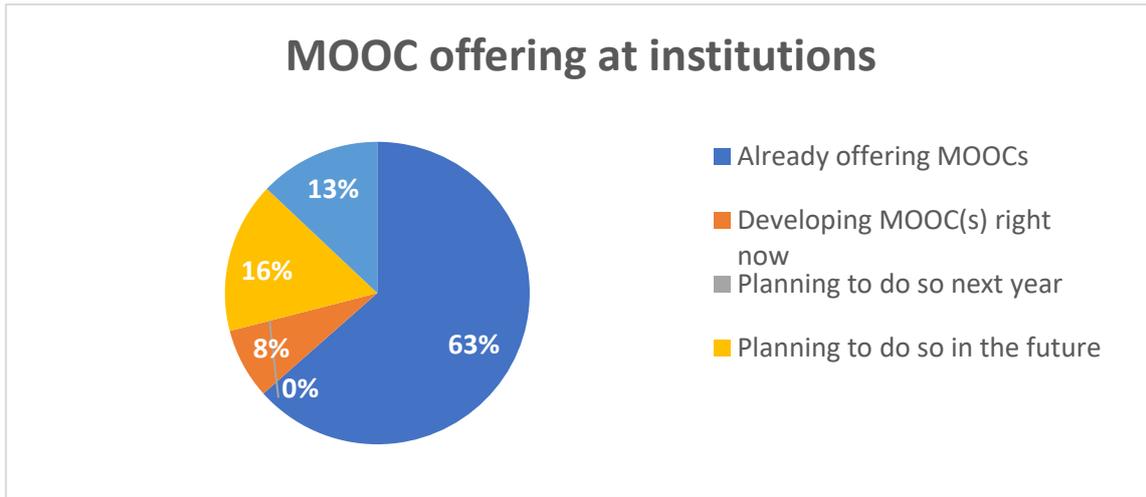


Figure 5: Present status of MOOC offerings, development and planning

Overall two-third (59) of the institutions are presently already offering MOOCs, with another seven institutions (8%) in the process of developing one or more MOOCs right now. Only six institutions (9%) in the overall sample do not intend to offer any MOOCs, neither in future.

On this topic the sub-samples clearly divert from the overall sample. In the French sub-sample more institutions are already offering MOOCs (90%), while in the Turkish sub-sample less institutions already offer MOOCs (32% only).

When comparing this year’s numbers to those of the previous surveys, the percentage of institutions offering MOOCs has grown again. Further growth in the uptake of MOOCs seems especially possible in the Turkish sub-sample, with indeed almost half of the sample indicating they are either in the process of developing MOOCs (7%) or are planning to do so in future (39%). In the rest of the sample the adoption of MOOCs is close to stabilization, taking into account the number of institutions already offering MOOCs and those in the process of developing these (83% together) and 9% with no intention to offer MOOCs whatsoever.

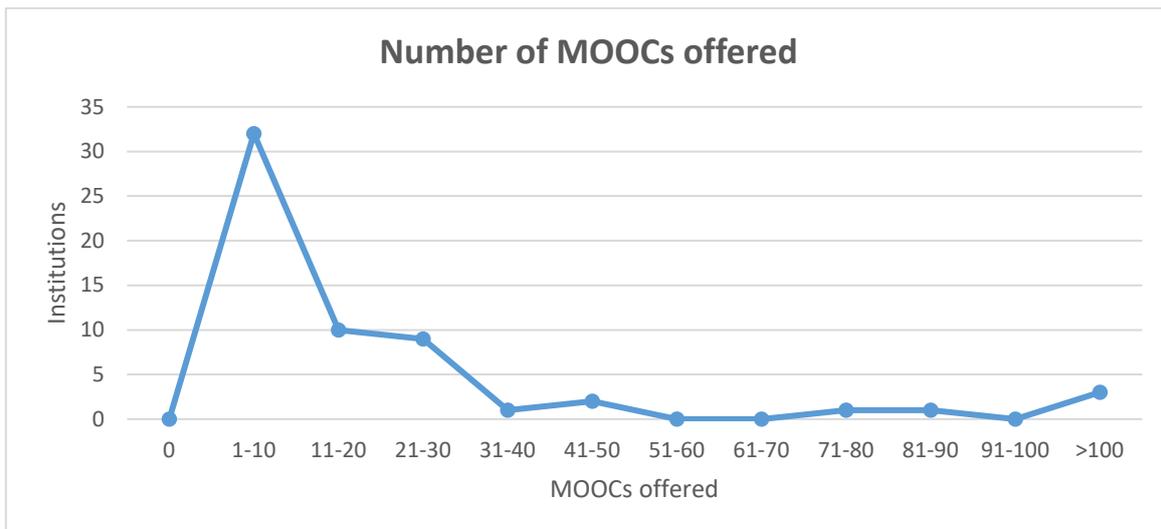


Figure 6: Total number of MOOCs offered by your institution since 2012

The further uptake of MOOCs can also be realised by increasing the number of MOOCs offered per institution. The numbers to support such a possible trend are mixed however. Of the 59 institutions

already offering MOOCs in this year’s survey, the majority (32) currently offers between 1-10 MOOCs, with ten institutions offering 11-20 MOOCs and another nine 21-30 MOOCs. Three institutions offer over a hundred MOOCs (UNED from Spain, the Higher School of Economics from Russia, and Ankara University from Turkey).

When compared to last year’s survey, the percentage of institutions offering 1-10 MOOCs has remained constant, with considerable growth in the percentage of institutions offering 11-30 MOOCs (currently 32%, last year 16%), but with a decrease in the percentage offering more than 30 MOOCs (currently 13%, last year 23%).

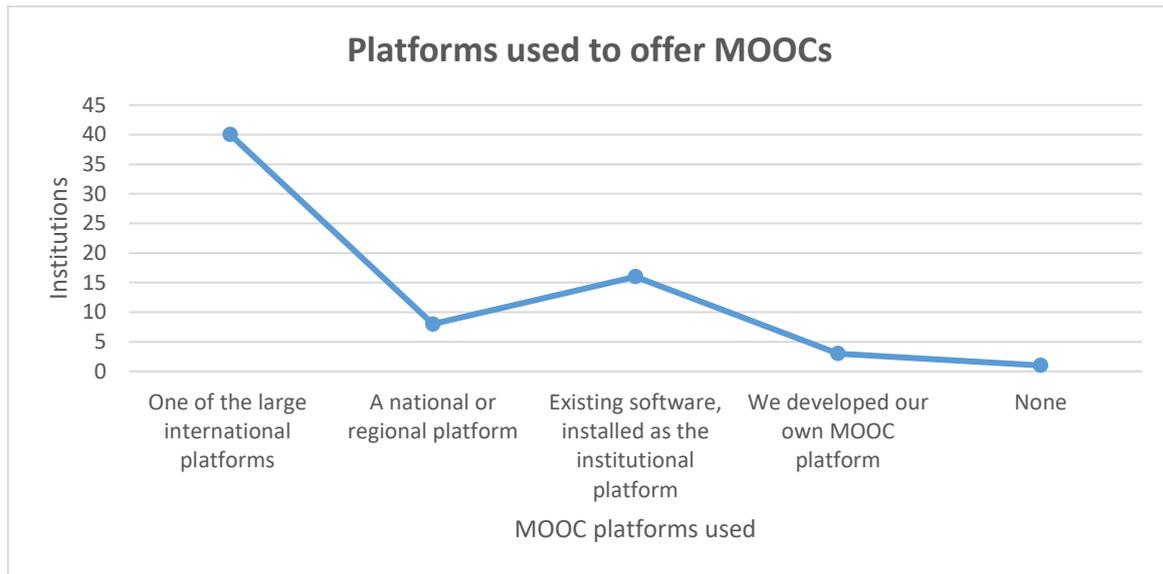


Figure 7: Platform used to offer MOOCs

The majority (40 out of 59, or 68%) of the institutions offering MOOC(s) offer these through one of the large international platforms (edX, Coursera, FutureLearn, Miríadax, FUN etc.). The use of institutional platforms (e.g. Moodle, OpenedX) comes second. National/ regional platforms and especially locally developed platforms are less popular.

Eight institutions deploy more than one platform, usually next to one of the large international platforms (not clear what came first ...). Of these eight, four also use existing software installed as their institutional platform; three also deploy a national/regional platform; and one also developed its own MOOC platform.

There is a marked difference between the overall sample and the sub-samples however. The relative importance of the large international platforms is even higher for the French sub-sample (25 out of 29, or 86%, use these), while in the Turkish sub-sample only one institution uses one of these large international platforms. Instead, of the nine Turkish HEIs already offering MOOCs seven do so through existing software installed as the institutional platform (e.g. Moodle, OpenedX).

Compared to last year’s survey the adoption of the large international platforms has increased considerably, from 31% then to 67% now, with a corresponding decrease in the use of locally installed open source platforms and in-house developed platforms. The percentage of national/regional platforms has slightly risen (from 5% to 13%), but due to low numbers it is not clear whether this indeed is part of a trend.

Re-use of existing MOOCs

In this section we investigate the re-use of MOOCs by looking at the extent to which institutions use MOOCs developed by others; their willingness to offer foreign-language MOOCs, either in their original language or as a translated version; and whether one’s own MOOCs are re-used by others.

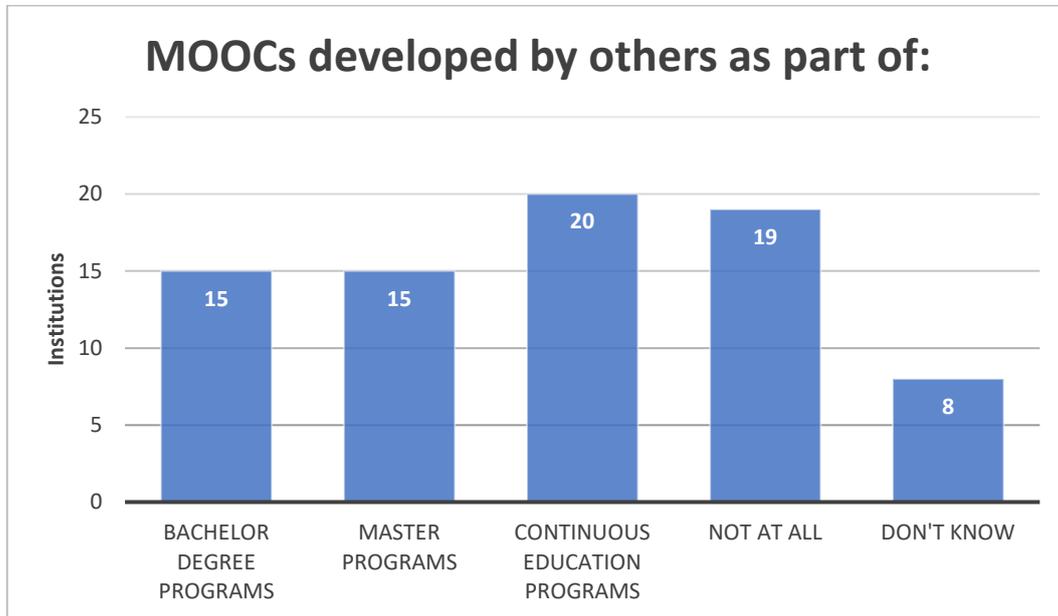


Figure 8: *Re-use of MOOCs developed by others*

Of the 59 institutions already offering MOOCs 19 only offer MOOCs they developed themselves while 32 (also) offer MOOCs developed by others; 8 don’t know. The 32 institutions re-using MOOCs from others represent 54% of the MOOC providers, similar to the percentage in last year’s survey.

Those that do offer MOOCs developed by others do so mainly as part of their continuous education offering (20), and to a lesser degree as part of a Master programme (15 institutions) or Bachelor programme (also 15 institutions). Of the eighteen institutions offering MOOCs developed by others at more than one level of their educational offering, eight do so at all levels (continuous-, Bachelor- and Master level).

Respondents were also asked whether their MOOCs are re-used by other institutions.

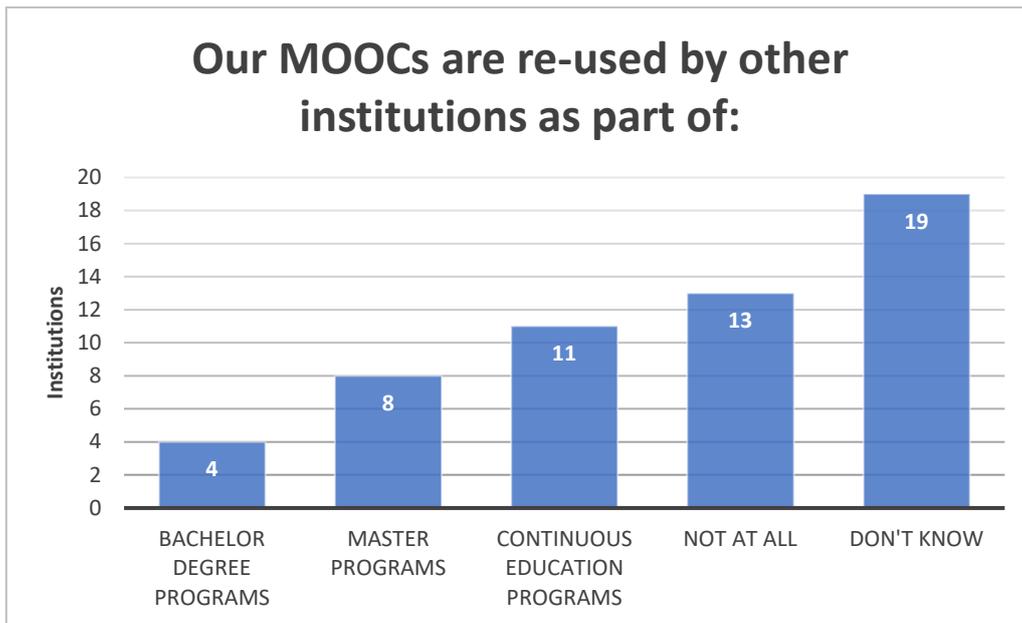


Figure 9: MOOCs re-used by other institutions

Of the 59 institutions already offering MOOCs, almost half (27) indeed indicated that their MOOCs are re-used by others, while many (19) do not know, and 13 are sure their MOOCs are not re-used by others at all.

When it comes to integrating MOOCs taught in another language, there is a marked difference between the sub-samples.

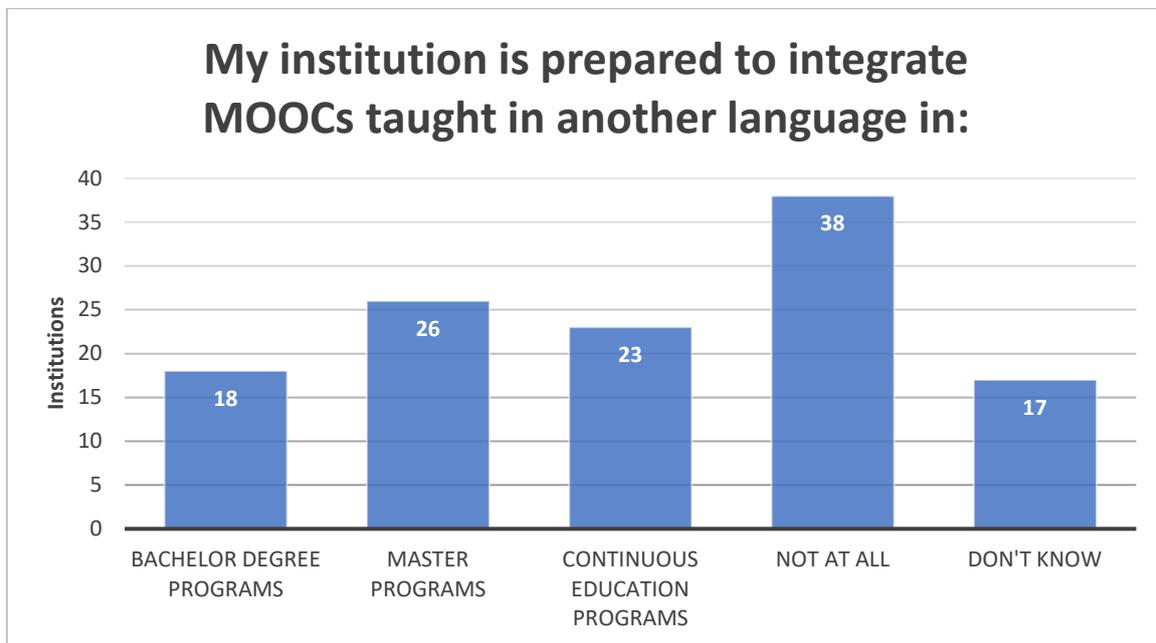


Figure 10: Willingness to integrate foreign-language MOOCs (total sample)

Overall 41 out of the 96 HEIs in the overall sample are willing to integrate such foreign-language MOOCs. Of the 38 respondents indicating they definitely are not willing to integrate foreign-language MOOCs, 25 are from the 31 HEIs in the Turkish sub-sample and nine from the 29 HEIs in the French sub-sample.

Of the 41 institutions willing to offer foreign-language MOOCs at more than one level, most (26) are willing to do so at Master level, followed by continuous education (23) and at Bachelor level (18). Nine are willing to do so at all three levels.

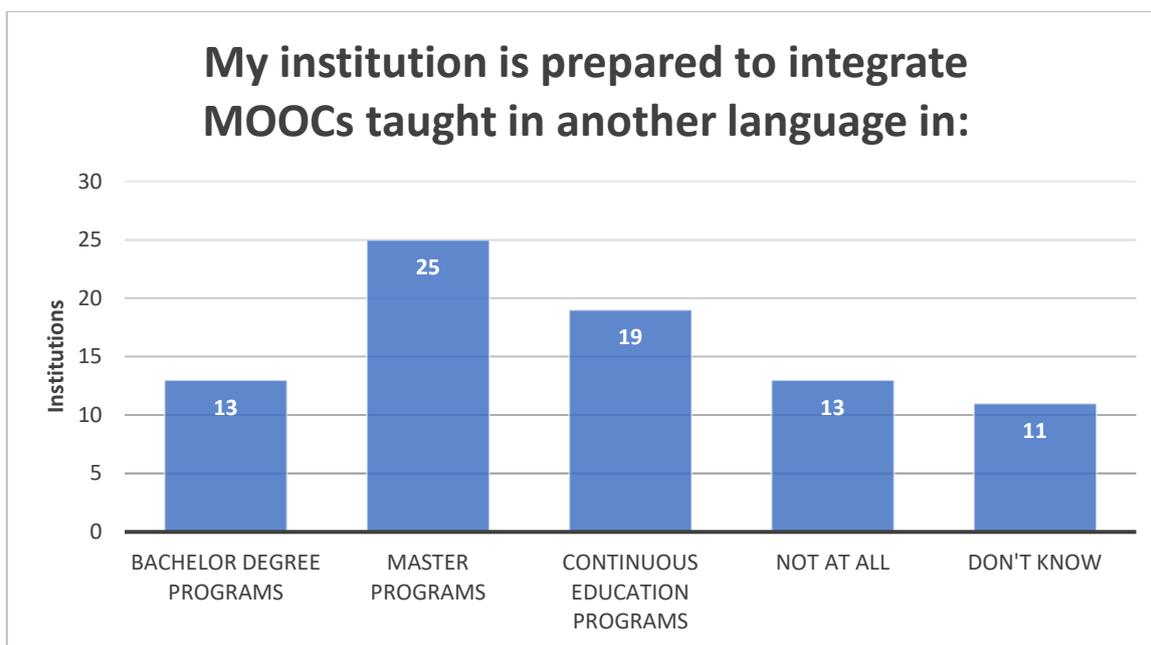


Figure 11: Willingness to integrate foreign-language MOOCs (sub-sample of the 59 MOOC providers)

If we only consider the 59 institutions already offering MOOCs there is somewhat more support for integrating such foreign-language MOOCs (only 13 institutions indicate they are not prepared to do so). The distribution over the three educational levels remains more or less the same as in the overall sample.

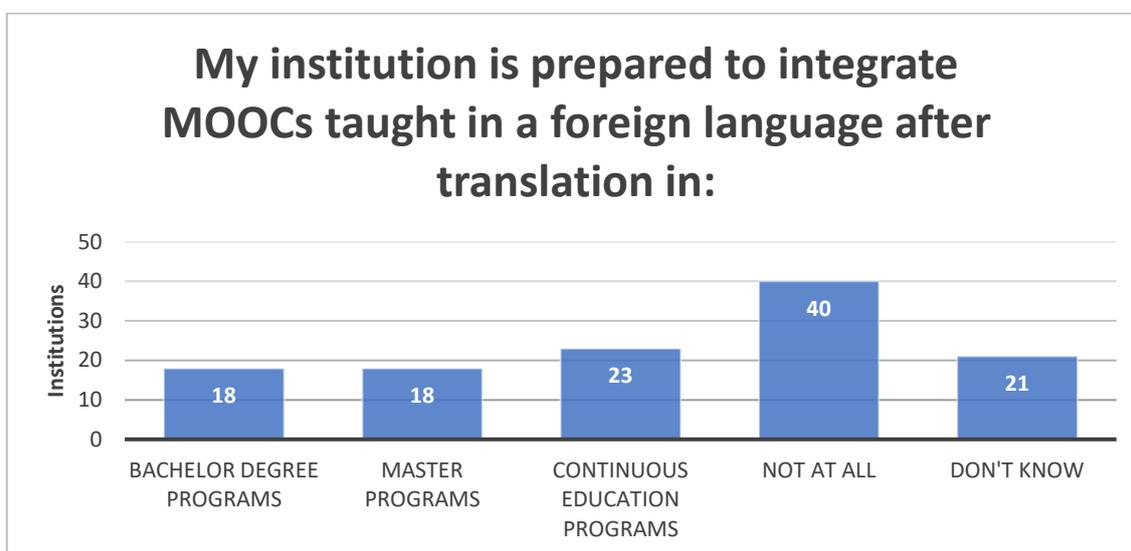


Figure 12: Willingness to integrate translated MOOCs (total sample)

When asked whether their institution is prepared to integrate MOOCs taught in a foreign language *after translation*, only 35 out of 96 indicate to be willing to do so.

For those institutions that are willing to offer translated MOOCs, the offering is fairly evenly distributed over Bachelor-level (18), Master-level (18), and continuous education (23).

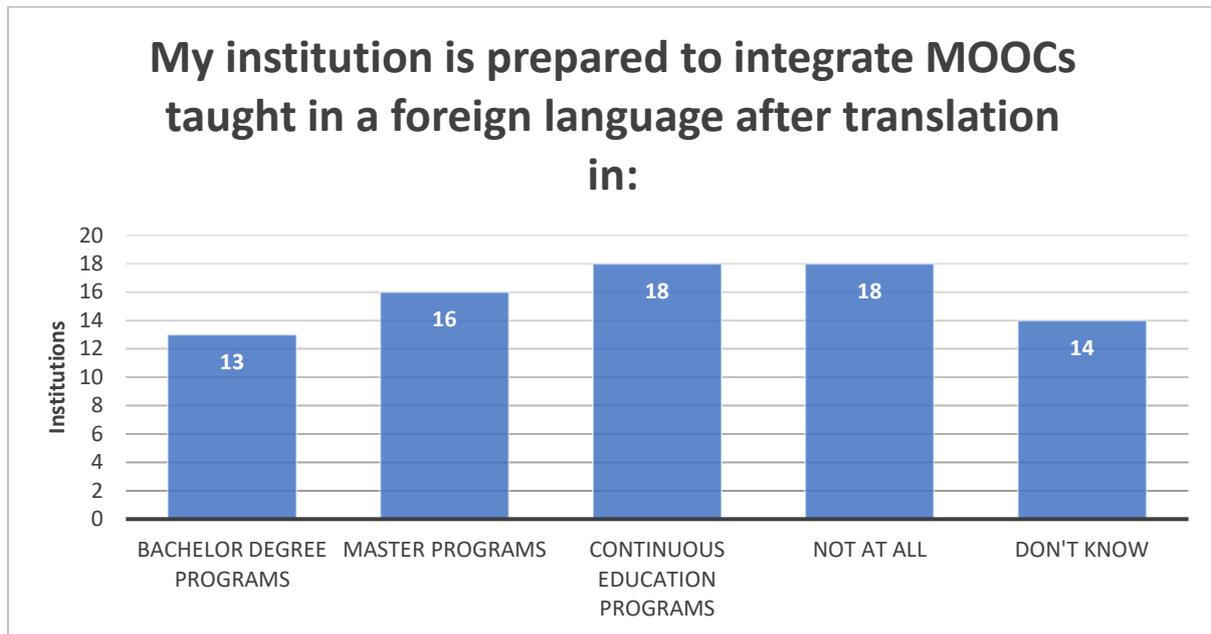


Figure 13: Willingness to integrate translated MOOCs (sub-sample of the 59 MOOC providers)

Responses from the sub-sample of 59 institutions already offering MOOCs provides a somewhat different picture as shown above.

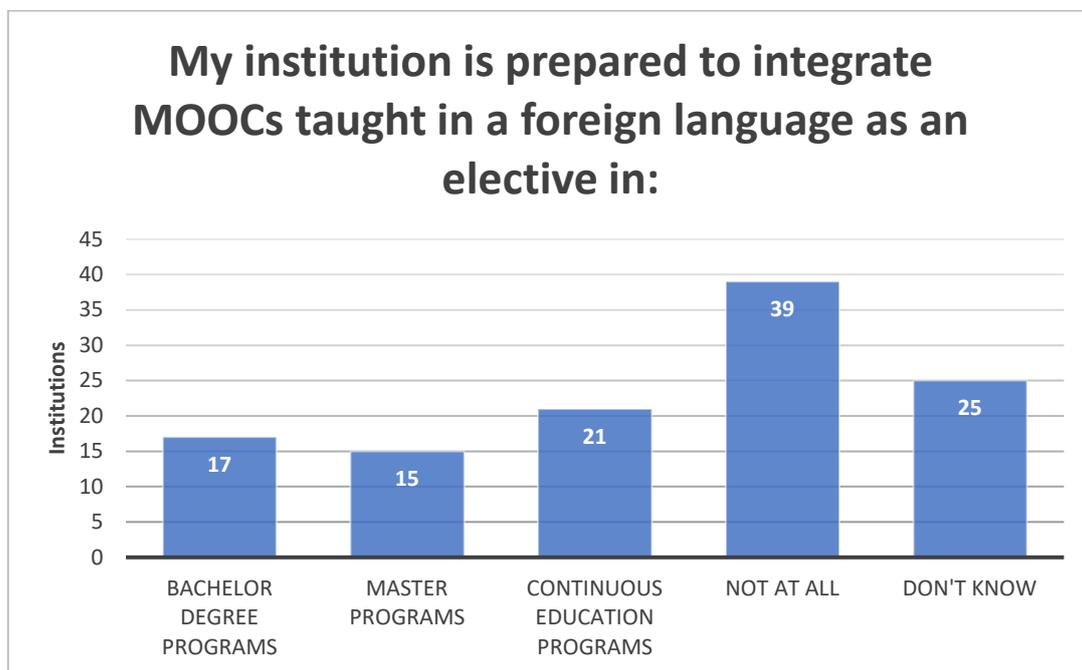


Figure 14: Willingness to integrate a foreign-language MOOC as an elective (total sample)

When asked whether institutions are willing to integrate foreign-language MOOCs as an *elective*, 32 (33%) indicate they are prepared to do so, often at various levels (Bachelor, Master, continuous education). This is lower than the 41 institutions that earlier indicated a willingness to integrate such foreign-language MOOCs as part of their regular programmes (see above).

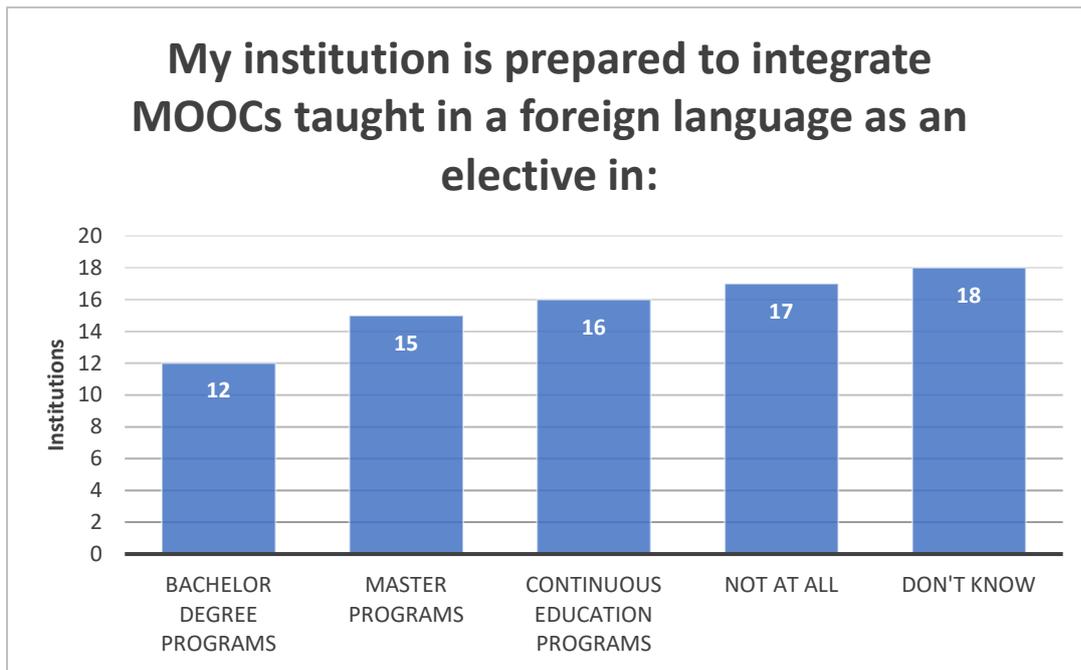


Figure 15: Willingness to integrate a foreign-language MOOC as an elective (sub-sample of the 59 MOOC providers)

Among the 59 institutions already offering MOOCs the willingness to integrate foreign-language MOOCs as an elective, not surprisingly, is higher (24, or 41%) but still 17 (29%) indicate they are not willing to do so.

On the re-use of existing MOOCs we can thus conclude that over half of the institutions already offering MOOCs also include MOOCs developed by others, most often as part of their continuous education offering. These results are similar to those of last year’s survey. The re-use of MOOCs *from* others is mirrored by the re-use *by* others of one’s own MOOCs.

The willingness to integrate foreign-language MOOCs in the institution’s educational offering varies considerable. Among Turkish HEIs the willingness to do so stands at 10%; for French HEIs at 34%; and for the remaining HEIs at 61%. Those institutions willing to offer foreign-language MOOCs seem slightly less keen on translating such foreign-language MOOCs before offering them, or to offer them as electives.

As the previous surveys did not contain questions on the (re-)use of foreign-language MOOCs, no trend analysis is possible on this issue.

Institutional strategies for the development and delivery of MOOCs

In this section we investigate the target groups, motives, barriers and possible support measures to further promote the development of MOOCs.

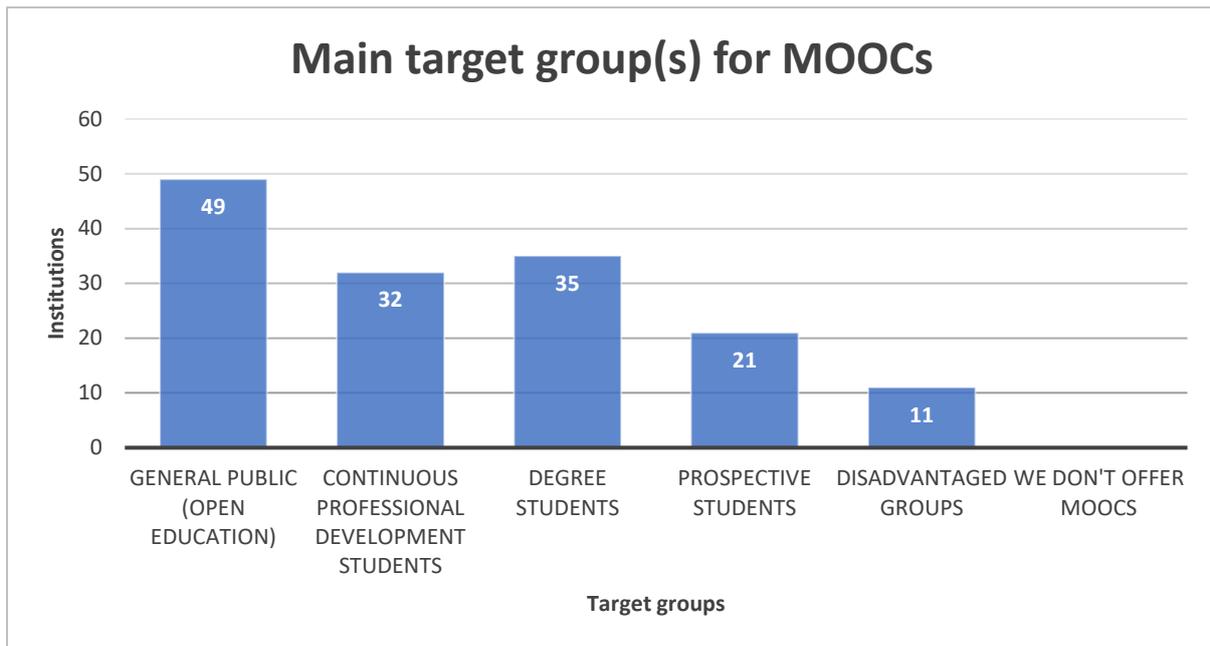


Figure 16: *Main target groups for MOOCs*

Almost all institutions presently offering MOOCs do so as ‘open education’ for the general public (49 out of the 59). The majority also offers MOOCs to their Degree students (35) and continuous education students (32). Institutions offering MOOCs for the general public remarkably often combine this with offering MOOCs for continuous professional development (30 institutions).

MOOCs are also offered to prospective students (21), but this may partly overlap with the offer for the general public. Eleven institutions offer MOOCs to disadvantaged groups specifically. Those eleven institutions all offer 10 or more MOOCs and tend to offer MOOCs to (almost) all the other categories of learners as well. Disadvantaged groups thus do not seem a strategic target group for HEIs in their MOOC offering.

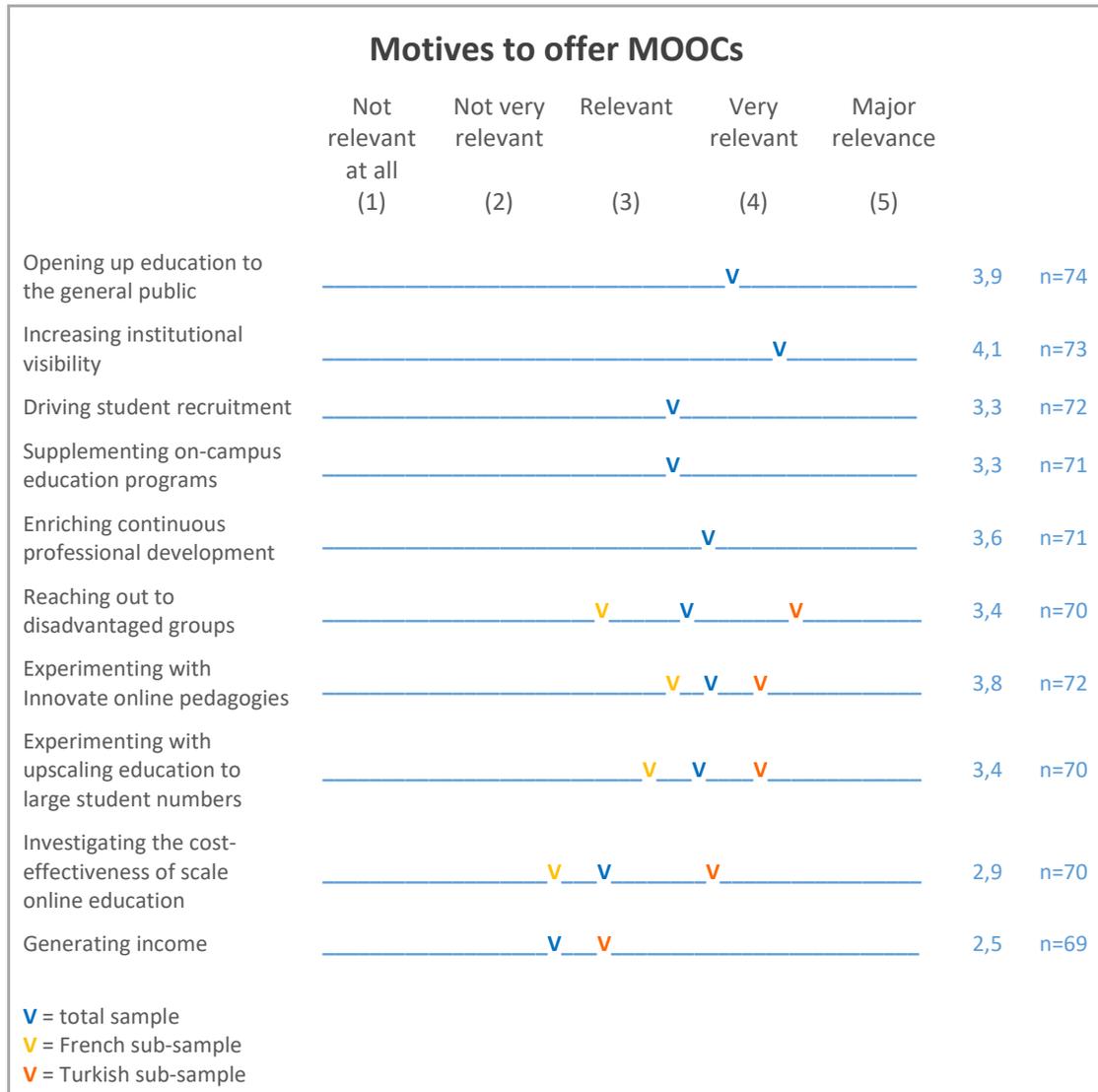


Figure 17: Motives to offer MOOCs

Respondents were asked to rate their institution’s motives on a 5-point likert scale. For the motives on which the sub-samples scored markedly different this is indicated in the figure above.

The major reason to offer MOOCs, as found in last year’s survey, is still to raise institutional visibility (score 4,1). This seems to tally with the next important motive, i.e. to open up education to the general public. These scores are in line with the responses to the previous question (see above) on the main target groups for MOOCs.

Other important motives are experimenting with innovate online pedagogies (3,7) and enriching continuous professional development (3,6 - also in line with the previous question).

The least important motive to develop and offer MOOCs is to generate income (2,5), although for Turkish HEIs this is somewhat more relevant than for the overall sample. This low score reconfirms similar results found with the previous 2014, 2015, 2016, 2017 and 2018 surveys. This seems to contrast with the trend (Class Central 2017) of the ‘shrinking of free’ of MOOC offerings. This is thus not confirmed for our sample, possibly due to the fact that the large majority of our sample comprises of publicly financed institutions.

Reaching out to disadvantaged groups is a special case. For the Turkish sub-sample this is the most important motive (4,3), while for the French sub-sample this is the two-but-least important motive (2,8)⁴.

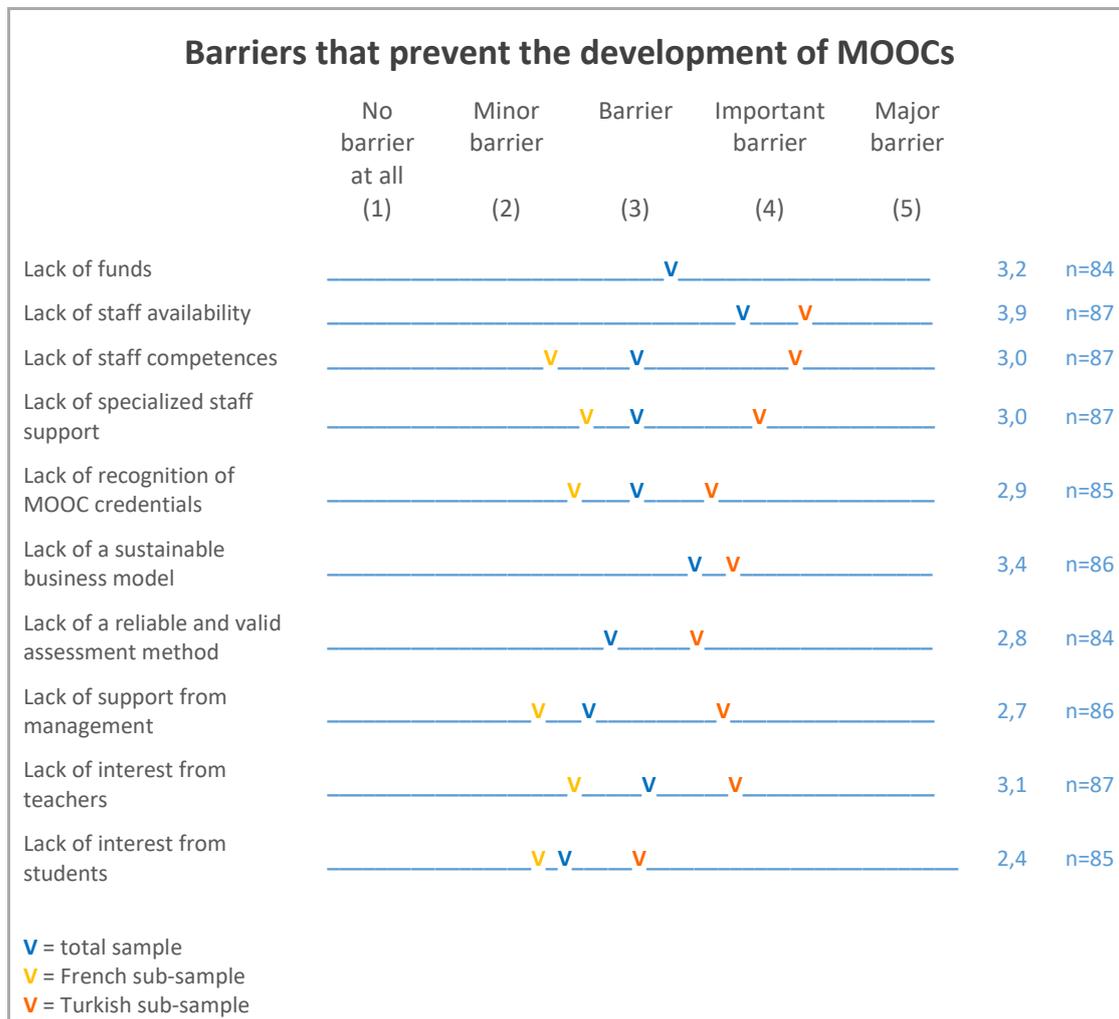


Figure 18: Main barriers preventing the development of MOOCs

When asked for the main barriers that prevent the development of MOOCs within one’s institution, Turkish HEIs tends to rate the importance of almost all barriers higher, which is consistent with the fact that relatively many Turkish HEIs are still in the process of developing MOOCs or are planning to do so in future.

Lack of staff availability is the biggest barrier overall. For the Turkish HEIs this is directly linked to a lack of staff competences and a lack of specialized staff support. For the rest of the sample lack of staff competences and specialized staff support is somewhat less of a barrier, but is the lack of funds a relatively important barrier. Most likely this lack of funds for these institutions is directly linked to the staffing issue, as ‘Lack of support from management’ for this group scores relatively low, indicating that the staffing issue is not the result of management deprioritizing MOOC development, but that real financial restrictions lead to low staff availability for MOOC development.

⁴ It seems that the Turkish sub-sample scores consistently higher – on all options – but we have not corrected for this as the overall pattern remains consistent.

The lack of a sustainable business model for developing MOOCs is the second most important barrier for the overall sample. Lack of student interest is the least relevant barrier.

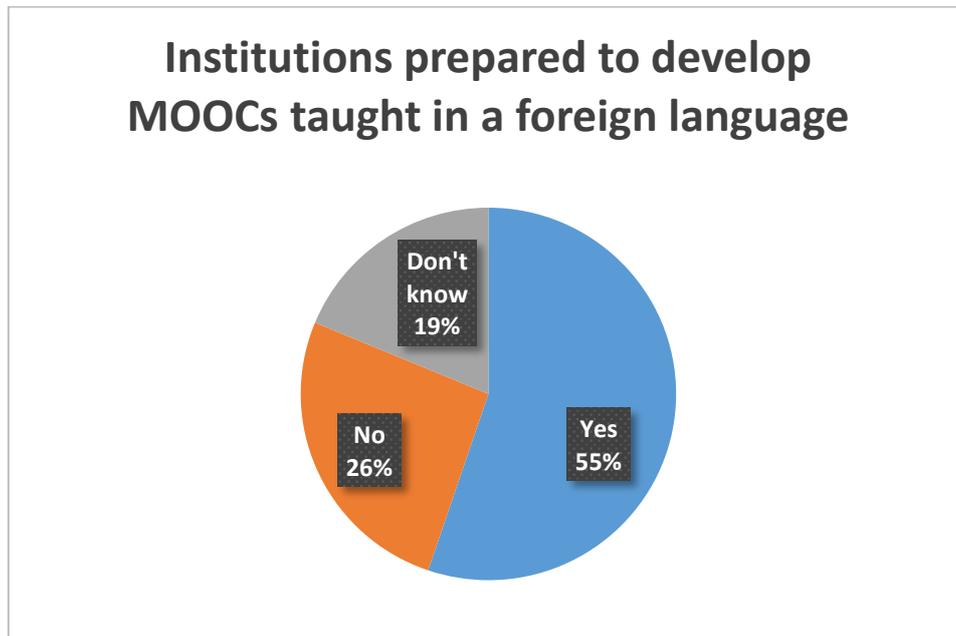


Figure 19: Willingness to develop a foreign-language MOOC

Most institutions (55%) are prepared to develop MOOCs in a foreign language to reach out to other countries; 26% is not prepared to do this, while 19% does not know. The willingness to develop MOOCs in a foreign language thus is matched by the willingness to integrate foreign-language MOOCs in one’s own offering (see above under the previous section on re-use of MOOCs).

National strategies for the development and delivery of MOOCs

Under this section we investigate present national strategies/policies, barriers, and possible measures to boost the development and delivery of MOOCs.

There are major differences between the sub-samples, therefore we present each of them below.

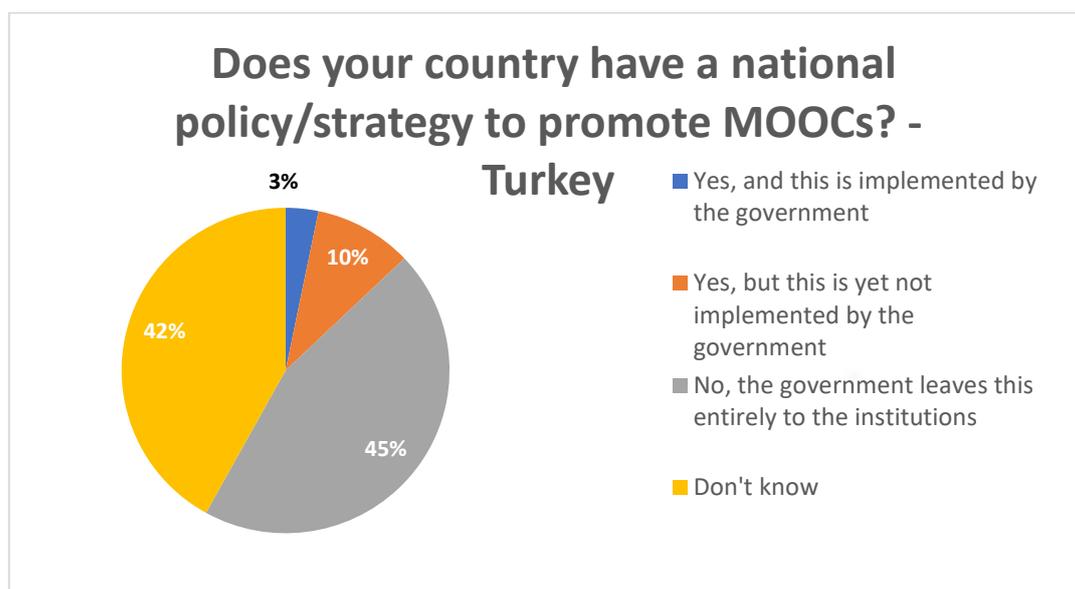


Figure 20: Existence of a national policy/strategy to promote MOOCs(Turkish sub-sample)

The majority of Turkish HEIs (87%) either are convinced there is no national MOOC policy, or they are not sure.

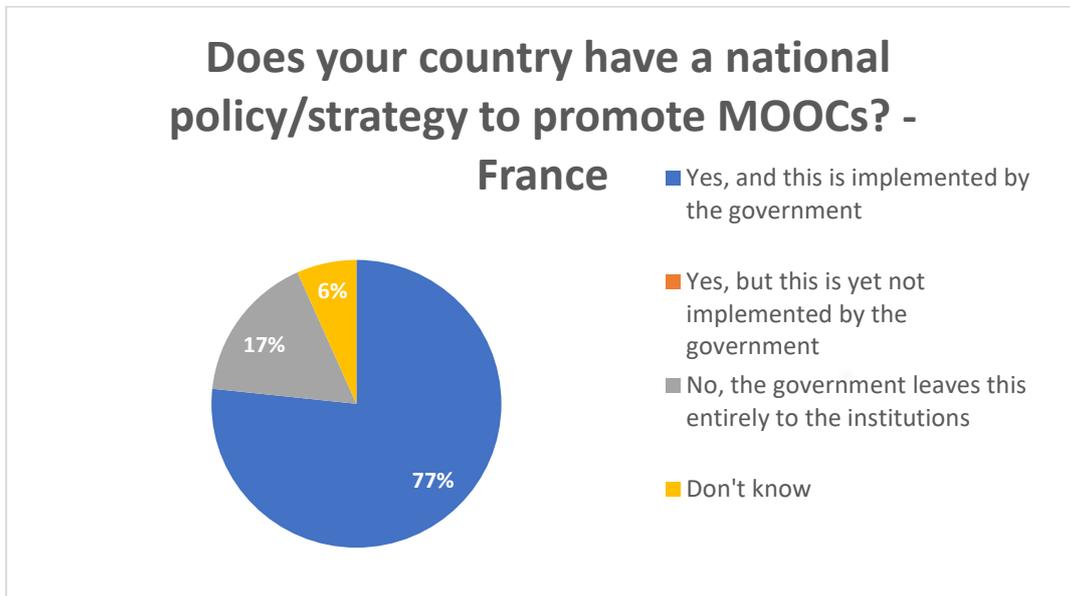


Figure 21: Existence of a national policy/strategy to promote MOOCs (French sub-sample)

In the French sub-sample the large majority (77%) of respondents indicates that a national policy/strategy to promote MOOCs exists and has indeed been implemented by their Government.

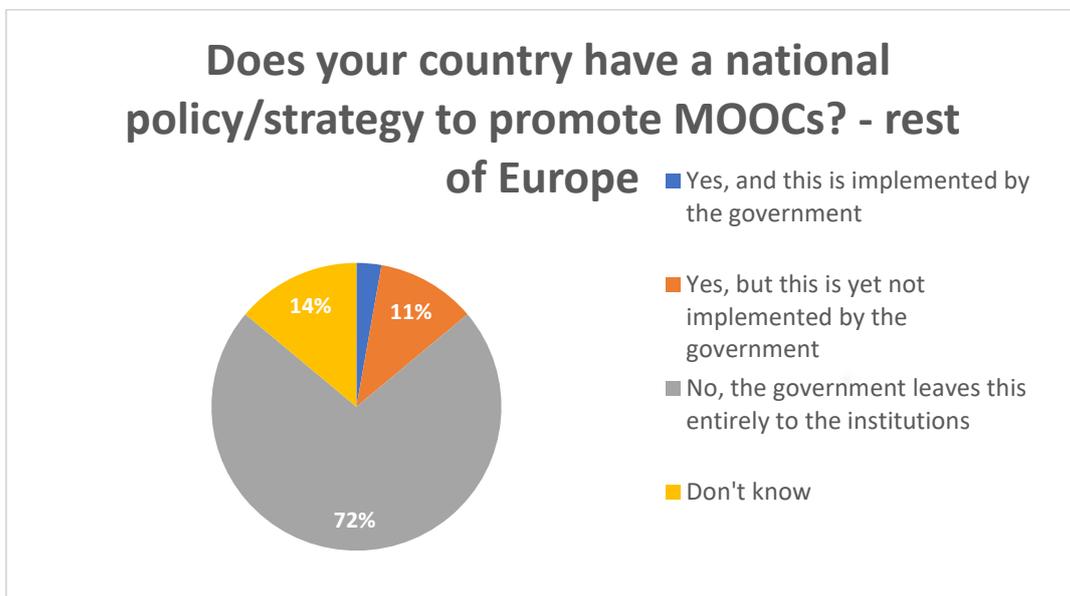


Figure 22: Existence of a national policy/strategy to promote MOOCs (rest of Europe)

In the rest of Europe most institutions indicate no such policy exists in their country, with only one respondent indicating such a policy is implemented and four respondents (11%) indicating that such a policy does exist but has not yet been effectively implemented (but these four are from four different countries, and this is not confirmed by other respondents from those same countries).

Except for France no national policies/strategies to promote MOOCs thus seem to be (effectively) implemented.

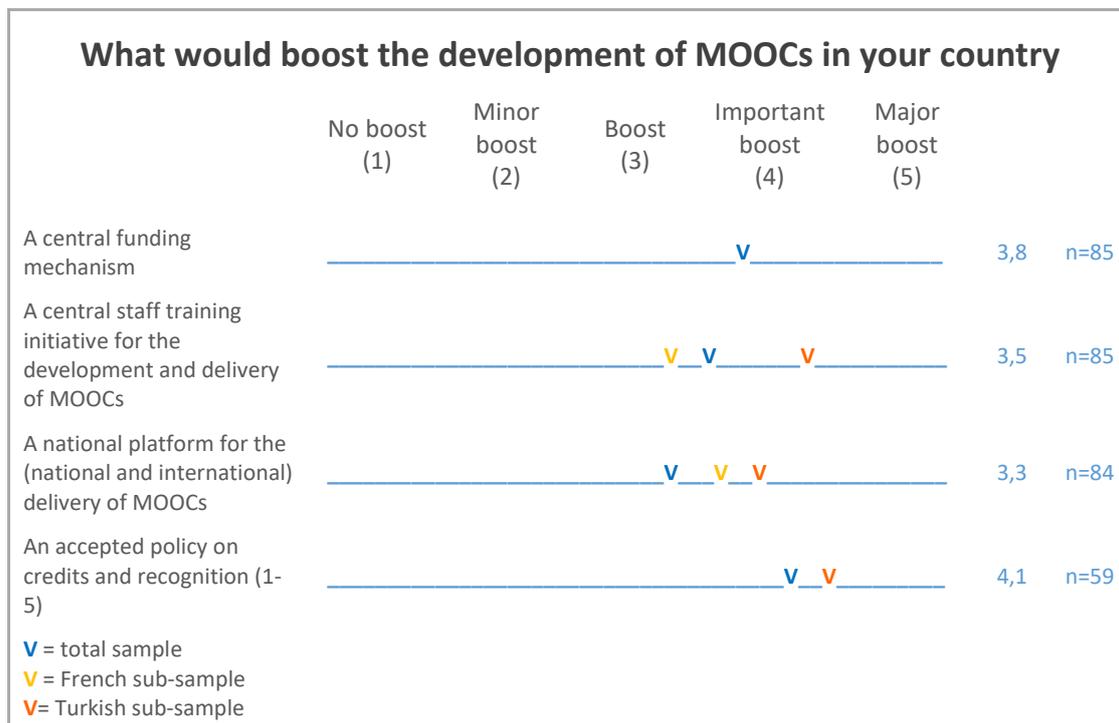


Figure 23: Measures to boost the development of MOOCs

To boost the development of MOOCs, first of all an accepted policy on credits and recognition is required, closely followed by a central funding mechanism. The latter seems to be corroborated by the findings under the previous section (lack of funding as a barrier), but less so for the former: the lack of recognition of MOOC credentials was not considered a very important barrier there.

Interestingly, the importance of an accepted policy on credits and recognition is equally important for the French institutions, although the responses on the existence of a national MOOC strategy/policy above seems to indicate that such a national policy/strategy does exist and has been implemented. This French national MOOC policy/strategy thus seems to exclude a solution for the recognition and accreditation of MOOCs.

A central staff training initiative for the development and delivery of MOOCs is especially important to Turkish HEIs, which confirms the earlier finding that the lack of staff competences is considered a major barrier to the development of MOOCs.

Both in Turkey and in France the availability of a *national* platform is expected to boost the development of MOOCs more than in the rest of Europe. In view of the earlier finding (see above under the section ‘Status of MOOC offering’) that most French institutions currently deploy one of the large international platforms, this need for a national platform seems to indicate some dissatisfaction with these international platforms currently in use. Interestingly, in the Turkish sub-sample where most institutions use existing software (e.g. Moodle, OpenedX) as the institutional platform, the availability of a national platform is also expected to further boost MOOC development.

Recognition of MOOC-based learning

Under this section we zoom in on the recognition of MOOC-based learning as a measure to boost MOOC uptake. Findings under the previous section already identified (the lack of) recognition of MOOC-based learning as somewhat of a barrier to the development of MOOCs in one’s institution, while an accepted policy on credits and recognition is considered a major boost to the development of MOOCs in one’s country.

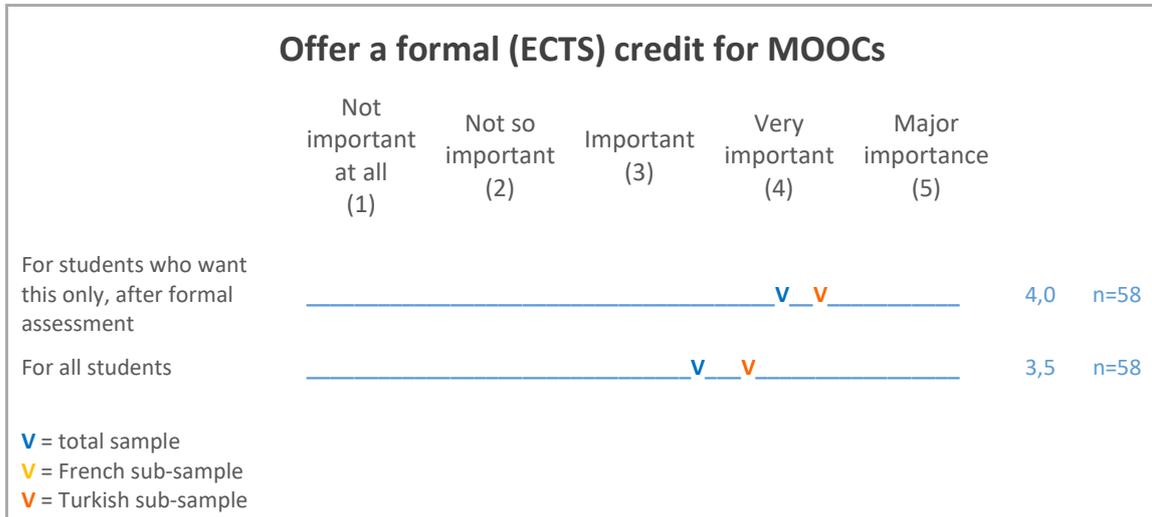


Figure 24: *Offering formal credits*

Asked about formally rewarding credits for MOOCs, respondents consider this very important for those students who explicitly ask for this (average score 4,0), but in fact also important all students (average score 3,5).

So devising a common framework through which to offer formal credits for MOOCs could form a major incentive for the development and uptake of MOOCs. But will this also lead to the recognition of those credits by other institutions? In the responses to this question there are marked differences between the different sub-samples which therefore are presented separately below.

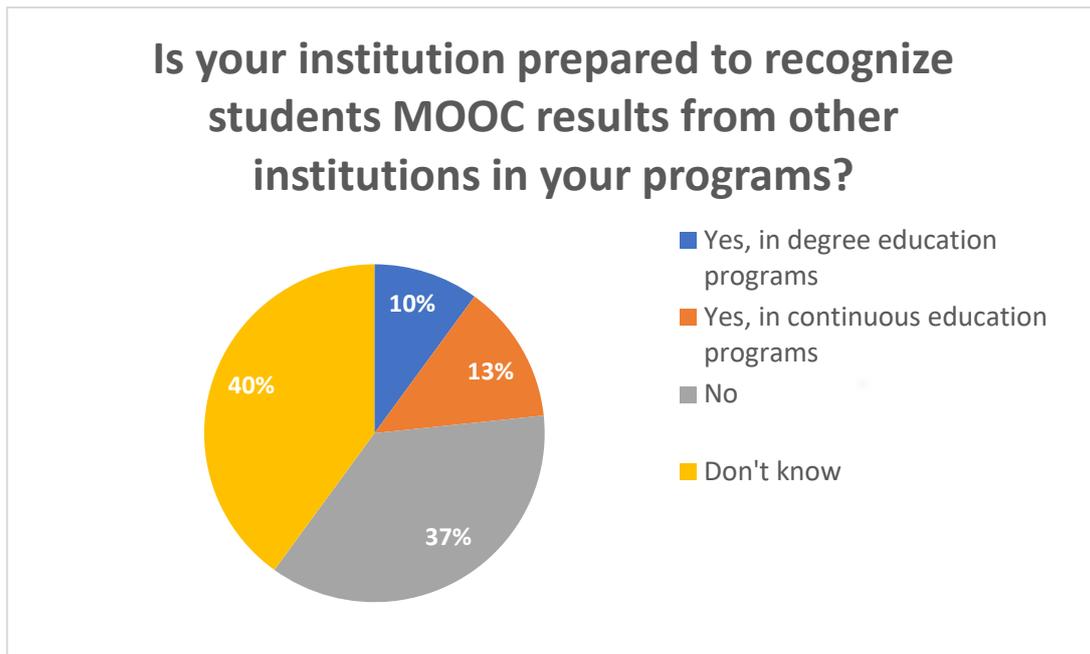


Figure 25: Preparedness to recognize MOOC results from other institutions (French sub-sample)

From the French institutions 23% is willing to recognize MOOC results from other institutions in either Degree programmes (10%) or in continuous education (13%), while 37% will not recognize such results. A large percentage (40%) does not know.

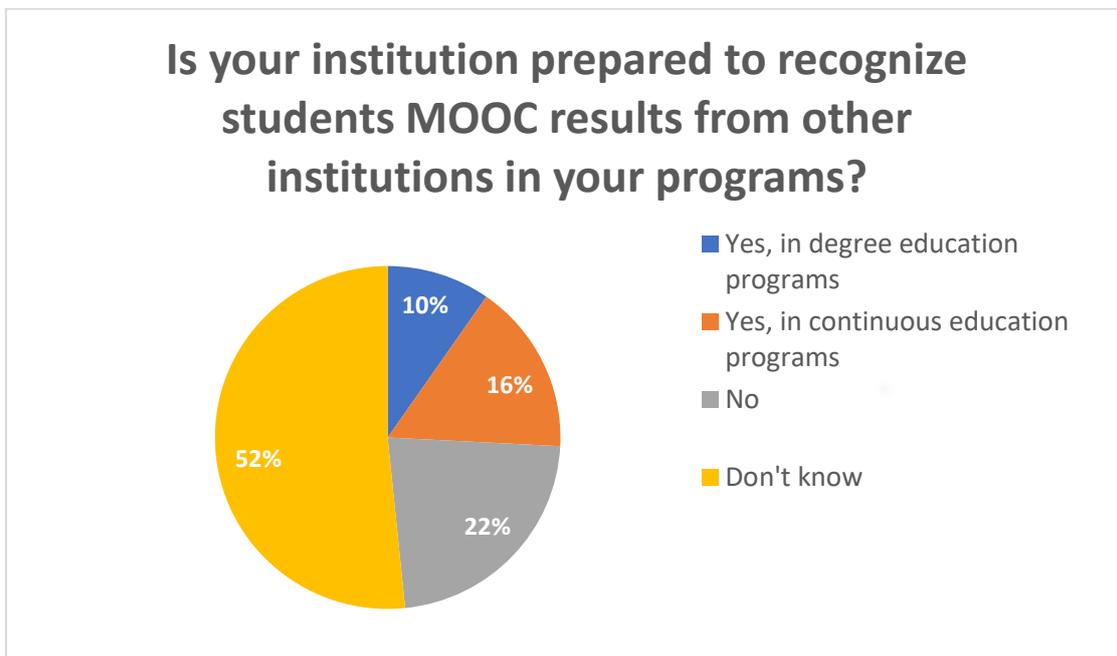


Figure 26: Preparedness to recognize MOOC results from other institutions (Turkish sub-sample)

Among the Turkish HEIs preparedness to recognize students' MOOC results from other institutions is limited (26% in total), while 22% will not recognize such results. More than half (52%) are not sure however.

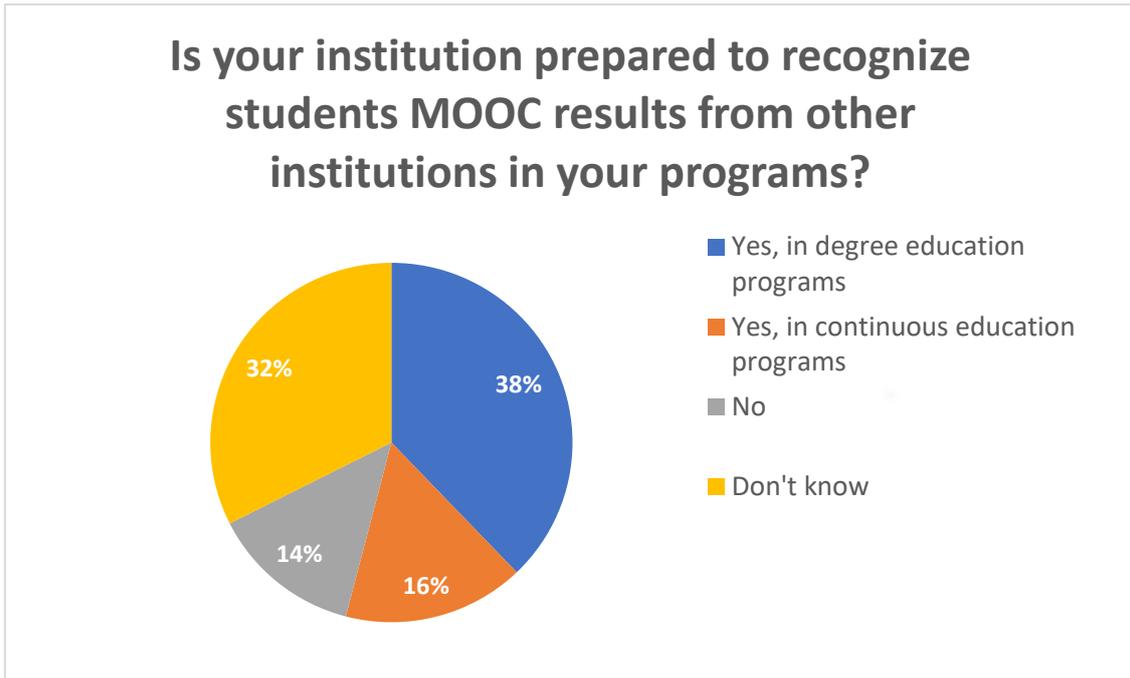


Figure 27: Preparedness to recognize MOOC results from other institutions (rest of Europe)

For the remaining institutions the willingness to recognize students' MOOC results from other institutions is higher: 38% for Degree programmes and 16% for continuous education programmes. Fourteen percent will definitely not recognize such results, and still 32% are not sure.

When asked to score various support measures to support recognition (figure below), the most interesting finding is the high scores on *all* answer options. The recognition of MOOC-based learning thus is a really important issue.

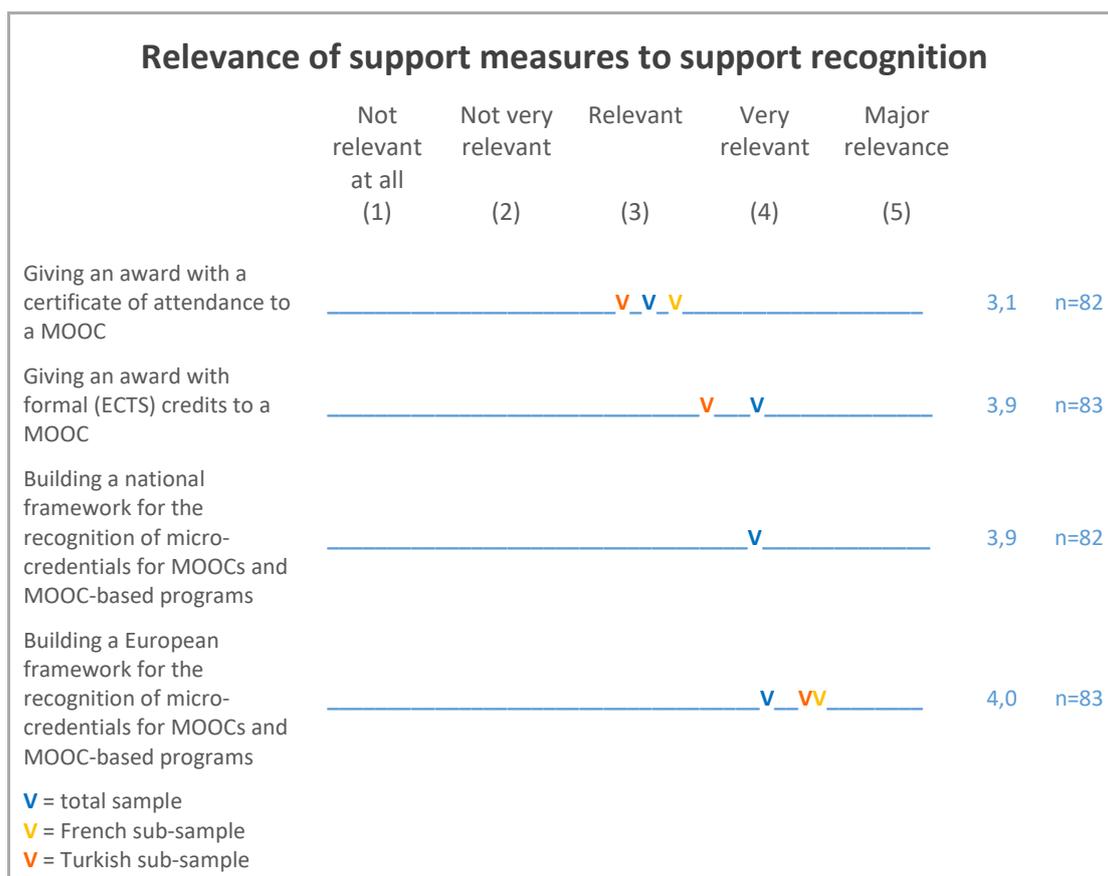


Figure 28: *Relevance of support measures to support recognition*

The most important measure to support the recognition of MOOC-based learning is to build a European framework) for the recognition of micro-credentials for MOOCs and MOOC-based programs (average score 4,0), closely followed by building a national framework (3, 9) and giving an award with formal (ECTS) credits to a MOOC (also 3,9).

Awarding certificates of attendance (without formal assessment) scores somewhat lower (3,20) but is thus still considered relevant.

MOOCs for opening up education to refugees

This last section of the survey investigates the (potential) role of MOOCs for refugees, which is an important topic of the MOONLITE project under which this survey was conducted. The responses to previous questions under the section ‘Institutional strategies’ (see above) already indicated that few institutions (11 out of the 59 HEIs presently offering MOOCs) target disadvantaged groups with their MOOC offering.

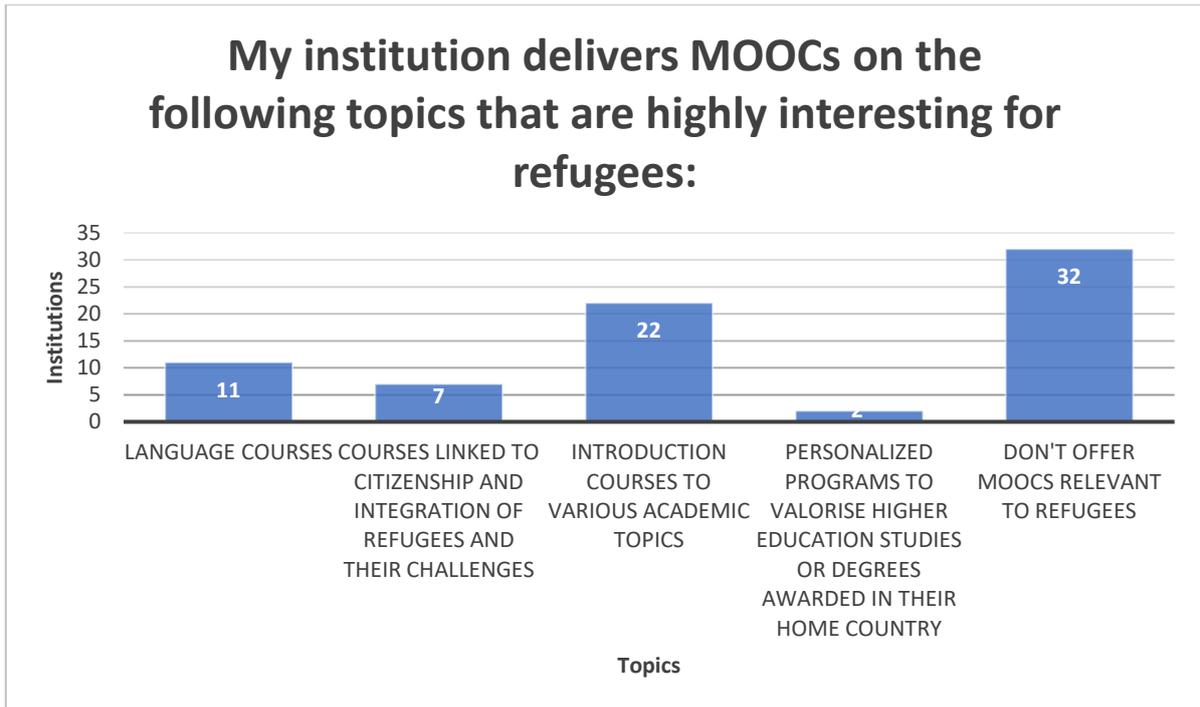


Figure 29: Present delivery of MOOCs interesting for refugees (sample: 59 MOOC providers)

This is confirmed here with 32 out of the 59 institutions presently offering MOOCs indicating that these MOOCs are not relevant for refugees (and thus 27 which do consider their MOOCs to be interesting), while just seven offer courses linked to citizenship and refugees.

The 27 institutions indicating that at least one of their MOOCs is interesting for refugees mostly list their introduction courses to various academic topics (22). Thus, these courses are not specifically developed for refugees, but may still be of interest in their own right or as orientation courses for prospective refugee students. Language courses almost by definition are interesting for refugees.

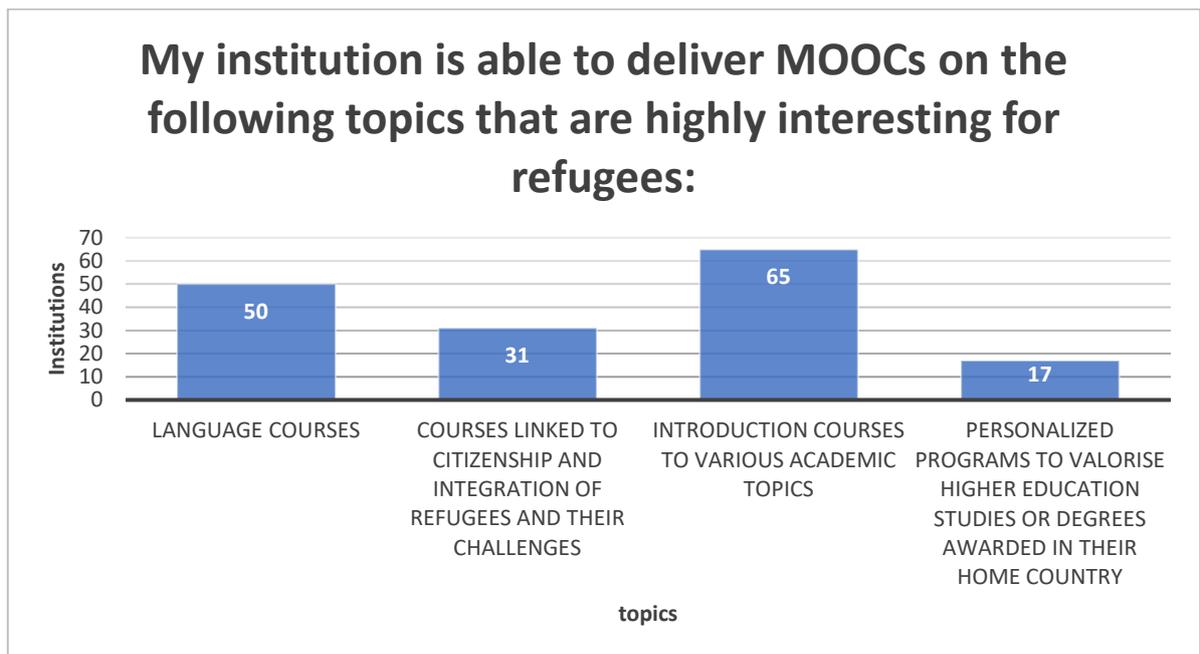


Figure 30: Potential delivery of MOOCs interesting for refugees (total sample)

Next to the actual MOOC offering for refugees, respondents were also asked about their institution’s *potential* to offer MOOCs that are interesting to refugees. The 27 institutions that earlier indicated they already do offer MOOCs interesting for refugees all reconfirmed this here. Of these, about two-third listed the same topics they are presently offering, thus indicating they probably will not offer MOOCs interesting for refugees on more topics than they already do.

Of the total sample of 96 respondents (thus including the 37 institutions that do not yet offer any MOOCs), only seven indicated they have no topics on which they could potentially offer MOOCs relevant to refugees. Of the 89 institutions that do have relevant topics to potentially offer as a MOOC to refugees, the majority again lists their introduction courses to various academic topics (65), followed by language courses (50). Interestingly, these institutions also see substantial potential to offer courses linked to citizenship and integration of refugees (31) and courses to valorise degrees awarded in refugees’ home countries (17).

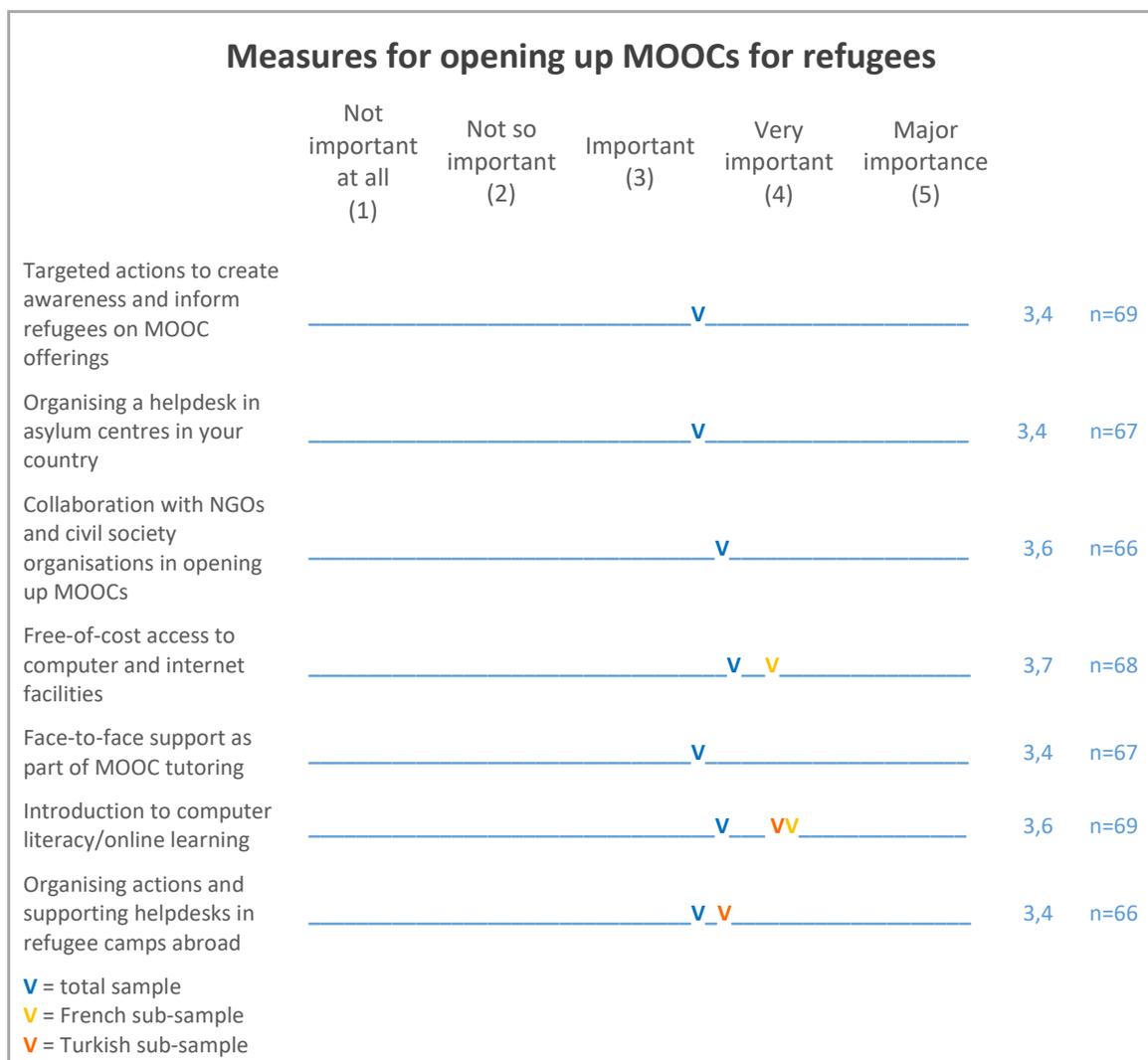


Figure 31: Measures to boost opening up MOOCs for refugees

When asked which measures can contribute to opening up MOOCs for refugees, the most interesting finding is probably that all options score about the same, and only just above ‘important’. This either indicates that respondents have no firm opinion on the issue, or that it is not considered a very pressing issue. This seems further corroborated by the fact that 28 respondents did not

answer this question at all (non-responses on other questions were almost non-existent). For the Turkish- and French sub-samples the introduction to computers/online learning for refugees is considered slightly more relevant (and the most important measure) here.

Annex 1: Survey

MOOC strategies for the future (v. 2019)

This survey will close on 30 April 2019 (final deadline) | First results available May 2019

* Required

Introduction

This survey focuses on strategies of European higher education institutions (HEIs) regarding MOOCs (Massive Open Online Courses | see definition <http://bit.ly/1DrMxXy>).

The main purpose of the survey is to assess the present uptake of MOOCs by HEI's, their future strategies, and the opportunities and barriers to the further uptake of MOOCs. The outcomes will contribute to policy recommendations at institutional, national level, and European level.

Similar surveys were initially conducted by the HOME project (<http://home.eadtu.eu/>), while the present survey is conducted under the MOONLITE project (<https://moonliteproject.eu/>)

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

This survey has 9 sections and will take about 15 minutes to complete. Upon completion you may request a copy of the survey outcomes to be published later this year.

NB: End May the survey report will be available at <https://eadtu.eu/home/publications/open-education-moocs-publications>

Profile Information

1. Your name: *

2. Your position: *

3. Full name of institution: *

4. Country of institution: *

5. Type of institution: *

Mark only one oval.

- Mainly publicly financed
- Mainly privately financed
- Mixed

6. Your institution's offering: *

Mark only one oval.

- Mainly on campus
- Mainly online/distance
- Mixed

7. Total number of students enrolled: *

Mark only one oval.

- Less than 5.000
- 5.000-14.999
- 15.000-29.999
- 30.000 or more

Status of MOOC offering at your institution

8. My institution: *

Mark only one oval.

- Is already offering MOOCs
- Is not yet offering MOOCs, but we are developing MOOC(s) right now
- Is not yet offering MOOCs, but we are planning to do so next year
- Is not yet offering MOOCs, but we are planning to do so in the future
- Is not yet offering MOOCs, nor do we intend to do so in future
- Don't know

9. Total number of MOOCs offered by your institution (from 2012 until now): *

10. Platform used to offer MOOCs: *

Check all that apply.

- One of the large international platforms (edX, Coursera, FutureLearn, Miríadax, FUN etc.)
- A national or regional platform (e.g. EduOpen, Italy)
- Existing software, installed as the institutional platform (e.g. Moodle, OpenedX)
- We developed our own MOOC platform
- None
- Don't know

Using existing MOOCs

11. My institution uses MOOCs developed by others as part of:*

Check all that apply.

- Bachelor degree programs
- Master programs
- Continuous education programs
- Not at all
- Don't know
- Other: _____

12. My institution is prepared to integrate MOOCs taught in another language in: *

Check all that apply.

- Bachelor degree programs
- Master programs
- Continuous education programs
- Not at all
- Don't know
- Other: _____

13. My institution is prepared to integrate MOOCs taught in a foreign language after translation in: *

Check all that apply.

- Bachelor degree programs
- Master programs
- Continuous education programs
- Not at all
- Don't know
- Other: _____

14. My institution is prepared to integrate MOOCs taught in a foreign language as an elective in: *

Check all that apply.

- Bachelor degree programs
- Master programs
- Continuous education programs
- Not at all
- Don't know
- Other: _____

15. Our MOOCs are re-used by other institutions as part of:*

Mark only one oval.

- Bachelor degree programs
- Master programs
- Continuous education programs
- Not at all
- Don't know
- Other: _____

Institutional strategies for the development and delivery of MOOCs

16. The main target group(s) for MOOCs at your institution is/are: *

Check all that apply.

- General public (open education)
- Continuous professional development students
- Degree students
- Prospective students
- Disadvantaged groups
- We don't offer MOOCs
- Don't know
- Other: _____

17. Motives for your institution to offer MOOCs (skip question if your institution doesn't offer MOOCs) :

Mark only one oval per row.

	not important at all	not so important	important	very important	major importance
Opening up education to the general public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing institutional visibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Driving student recruitment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplementing on-campus education programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enriching continuous professional development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reaching out to disadvantaged groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experimenting with innovate online pedagogies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experimenting with upscaling education to large student numbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investigating the cost-effectiveness of scale online education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Generating income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. What are barriers that prevent the development of MOOCs in your institution (skip option if you don't know):

Mark only one oval per row.

	no barrier at all	minor barrier	barrier	important barrier	major barrier
Lack of funds	<input type="radio"/>				
Lack of staff availability	<input type="radio"/>				
Lack of staff competences	<input type="radio"/>				
Lack of specialized staff support	<input type="radio"/>				
Lack of recognition of MOOC credentials	<input type="radio"/>				
Lack of a sustainable business model	<input type="radio"/>				
Lack of a reliable and valid assessment method	<input type="radio"/>				
Lack of support from management	<input type="radio"/>				
Lack of interest from teachers	<input type="radio"/>				
Lack of interest from student	<input type="radio"/>				

19. My institution is prepared to develop MOOCs taught in a foreign language *

Mark only one oval.

- Yes
- No
- Don't know

Stimulating the development and delivery of MOOCs

20. Does your country have a national policy/strategy to promote MOOCs? *

Mark only one oval.

- Yes, and this is implemented by the government
- Yes, but this is yet not implemented by the government
- No, the government leaves this entirely to the institutions
- Don't know
- Other: _____

21. What would boost the development of MOOCs in your country (skip option if you don't know)?

Mark only one oval per row.

	no boost	minor boost	boost	important boost	major boost
A central funding mechanism	<input type="radio"/>				
A central staff training initiative for the development and delivery of MOOCs	<input type="radio"/>				
A national platform for the (national and international) delivery of MOOCs	<input type="radio"/>				
An accepted policy on credits and recognition	<input type="radio"/>				

Recognition of MOOC-based learning

22. It is important to offer formal (ECTS) credits for MOOCs next to more informal certification like a certificate of participation (skip option if you don't know).

Mark only one oval per row.

	not important at all	not so important	important	very important	major importance
For students who want this only, after formal assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
For all students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. Is your institution prepared to recognize students' MOOC results from other institutions in your programs? *

Mark only one oval.

- Yes, in degree education programs
- Yes, in continuous education programs
- No
- Don't know

24. Is your institution prepared to recognise a study program compiled completely of MOOCs and awarded with micro-credentials based on a formal assessment (e.g. MicroMasters, nano-degrees,)? *

Mark only one oval.

- Yes, as part of a degree program
- No, as part of continuous education program
- We never considered this yet
- Don't know

25. What is the relevance of the following measures to support the recognition of MOOC-based learning (skip option if you don't know):

Mark only one oval per row.

	not relevant at all	not very relevant	relevant	very relevant	major relevance
• Giving an award with a certificate of attendance to a MOOC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
• Giving an award with formal (ECTS) credits to a MOOC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
• Building a national framework for the recognition of micro-credentials for MOOCs and MOOC-based programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
• Building a European framework for the recognition of of micro-credentials for MOOCs and MOOC-based programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26. My institution delivers MOOCs on the following topics that are highly interesting for refugees: *

Check all that apply.

- Language courses
- Courses linked to citizenship and integration of refugees and their challenges
- Introduction courses to various academic topics
- Personalized programs to valorise higher education studies or degrees awarded in their home country
- Don't offer MOOCs relevant to refugees
- Other: _____

27. My institution is able to deliver MOOCs on the following topics that are highly interesting for refugees: *

Check all that apply.

- Language courses
- Courses linked to citizenship and integration of refugees and their challenges
- Introduction courses to various academic topics
- Personalized programs to valorise higher education studies or degrees awarded in their home country
- Other: _____

28. Which of these measures for opening up MOOCs for refugees are important? (skip option if you don't know)

Mark only one oval per row.

	not important at all	not so important	important	very important	major importance
Targeted actions to create awareness and inform refugees on MOOC offerings	<input type="radio"/>				
Organising a helpdesk in asylum centres in your country	<input type="radio"/>				
Collaboration with NGOs and civil society organisations in opening up MOOCs	<input type="radio"/>				
Free-of-cost access to computer and internet facilities	<input type="radio"/>				
Face-to-face support as part of MOOC tutoring	<input type="radio"/>				
Introduction to computer literacy/online learning	<input type="radio"/>				
Organising actions and supporting helpdesks in refugee camps abroad	<input type="radio"/>				

Thank you!