

# Comparing Institutional MOOC strategies

Status report based on a mapping survey conducted in October - December 2015

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## Acknowledgement / about HOME project

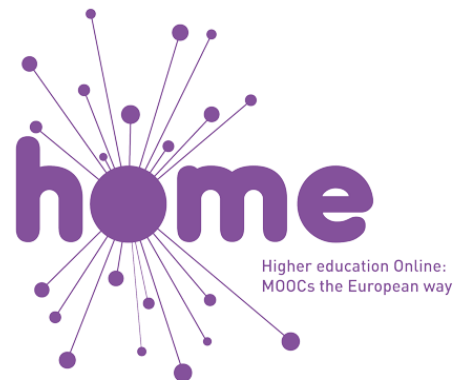
This report is published as part of the project HOME - Higher education Online: MOOCs the European way. HOME is partly funded by the European Commission's Lifelong Learning Programme. HOME started in January 2014 and is funded to June 2016. The aim of the project is to develop and strengthen an open network for European cooperation on open education, in general, and Massive Open Online Courses (MOOCs), in particular. The partners will build an open institutional network on MOOCs based on European values like openness, equity, quality and diversity.

The HOME partners saw the need to develop a survey to benchmark the strategy of higher education institutions to MOOCs. Not only benchmarking amongst European institutions but also to other surveys in, for example, the United States. This 2015 survey is largely a repetition of the survey of 2014. Next to the comparison between Europe, France Canada and the U.S., different country reports are produced as well.

The coming years the partners will continue this survey, supporting an independent study, offering full privacy for all respondents, and providing free distribution of all report publications.

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## Executive Summary

This report presents the results of a MOOC survey amongst higher education institutions (HEIs) with a strong focus on Europe and Canada. The survey was conducted in the fourth quarter of 2015. The results of this survey are compared to a similar study the year before as published in Jansen and Schuwer (2015). In addition the output is compared to three other European studies (Gaebel, Kupriyanova, Morais, & Colucci, 2014; Little, 2016; Muñoz, Punie, Inamorato dos Santos, Mitic, & Morais, 2016) and studies in the U.S. (Allen & Seaman 2014, 2015, 2016). Some questions are identical in all seven surveys, while for other questions a comparison is limited to a few of those surveys.

### Dimensions of MOOCs / MOOC definitions

It is important to note that MOOCs remain relatively poorly defined. A collective of European projects defined 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). This years’ survey repeated the questions of the 2014 survey and confirms the importance of the different criteria related to each MOOC letter. Only small differences are reported. The only exception is hereby that more respondents in this years’ survey (68,6%) state that it is (highly )relevant that “MOOCs should provide a sustainable model for the mass”. This is seen as one important aspect that defines the difference between MOOCs and other online courses. Related to the open dimension an additional question was asked: 70% finds it (highly) relevant that MOOCs should promote the use of OER. This re-use dimension will be an additional focus in the next survey late 2016.

### Uptake of MOOCs compared.

While in the U.S. the number of HEIs that have a MOOC or is planning to add MOOC offering is stable at 12-13% for the last three years, European HEIs seem much more involved with in general over 45% of HEIs (planning to) offer MOOCs. Although differences between European countries are reported - ranging from 25% in Germany to about 60% in France in Muñoz et al (2016) and ranging from 45% in Turkey to 90% in Italy and Portugal in this report - these studies in general demonstrate that the uptake of MOOCs in Europe is maturing at a much higher level compared to the US.

### Impact and sustainability

It is concluded from this survey and that of Little (2016) that respondents are convinced that MOOCs indeed have some or even a large impact at many different levels of higher education institutions. In this study the (expected) impact of MOOCs in different levels of the institution is the highest on the online/distance students, the academic staff and at part time students. Already in the previous report (Jansen & Schuwer, 2015) it was observed that more than half of the institutions of the EU agree that MOOCs are a sustainable method for offering courses. In contrast to the U.S. where the opinion is mostly neutral or disagree. This is again confirmed in this survey. However, some differences between countries outside continental Europe are observed as for example Ireland thinks very neutral about this and Canada is also less positive than the overall group.

### Objective of HEIs to be involved

While in the U.S. surveys, the opinions are mostly neutral or disagree, both the 2014 and 2015 (EU) surveys shows that a large majority of the respondents agree that “MOOCs are important to learn

about online pedagogy". This is confirmed when comparing the primary objectives of the HEIs for offering a MOOCs. In all surveys, the objectives related to finance (explore cost reduction, generate income) and scalability dimensions of MOOCs are not regarded as primary objectives. The present survey confirms that in Europe using MOOCs for student recruitment is not considered as important as in U.S., but rather to reach new students and creating flexible learning opportunities (for those new students).

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

In general these independent studies confirm that the European HEIs are more broadly involved in MOOCs compared to the U.S. institutions. Moreover, it seems that European HEIs are clearly confident regarding MOOC development and implementation. The European institutions are having a more positive attitude towards MOOCs and those offering MOOCs have positive experiences. For example, more than half of European HEIs already state that some/most objectives are already met. This indicates that an overall institutional strategy and/or policy on MOOCs is present. During the Policy forum of European MOOCs several of those institutional strategies were presented (Jansen & Konings, 2016b).

#### Possible reasons for differences between U.S. and (continental) Europe

Jansen, Schuwer, Teixeira, and Aydin (2015b) pose the thesis that these large differences between U.S. and Europe might be related to the differences between higher educational systems. Although speculative there is reason to believe that the case for MOOCs in Europe is linked to the long tradition of promoting life-long learning and access to higher education. With the remarkable exception of the United Kingdom it needs to be noted that in Europe higher education is still largely framed from a policy perspective as a public good, as distinct from private or personal commodity. As in continental European HEIs are strongly state funding - most institutions have equal resources, the market-based US model has mixed private-public funding and provision with large differences between HEIs. This tradition along with major differences in the business model for higher education, the availability of European Commission funding for MOOCs, and the mechanism of the European Credit Transfer System (ECTS) may help to explain such differences.

#### Collaboration of outsourcing

This survey also demonstrates that many European higher education institutions are willing to collaborate on scalable services in MOOC provision, and that a regional collaboration is much more likely than outsourcing services to corporate parties. It is generally observed that European HEIs are very much willing to collaborate on services like co-creating MOOCs with other institutions, re-using elements from MOOCs, development of MOOC (materials) and in the design of MOOCs next to the use of MOOC platforms. The joint development of a European MOOC platform is not very likely as well as services on selling data, translation services and follow-up materials.

As such different stakeholders in Europe now call for different regional strategies to leverage the full potential of online learning and MOOCs for education and development. In general an increasing number of supportive policies to stimulate the uptake of MOOCs at various levels is observed. This includes MOOC policies by IGOs (e.g. UNESCO, OECD), by the European Commission (for example

through programmes of DG EAC and DG Connect), national governments (e.g., France, the Netherlands, Slovenia) and private companies (like MOOC platform providers). As such, collaboration between European HEIs, governments and civil societies seems to accelerate the development, the delivery as well as the usage of MOOCs.

#### Challenges for Europe in the MOOC evaluation

As many European Institution are (going to be) involved in MOOCs, the need for regional / cross-institutional collaboration schemes will increase. Especially as most of these HEIs cannot become partner of the big MOOC providers as they apply a selective contracting policies to HEIs. However, the regional differences in languages, cultures and pedagogical approaches might hinder an effective collaboration on scalable services in MOOC provision. MOOC provision (and collaboration on shared services) should account for diverse languages, cultures, settings, pedagogies and technologies. As such the generic MOOC model needs to be re-engineered to allow for a broad spectrum of approaches and contexts. We are now witnessing a trend towards a demand-led approach, designing MOOCs in response to the requirements of particular groups in society who need to have more knowledge on a specific topic. Bringing social approaches and thinking about these design processes is essential to realise the real value of MOOCs.

In at least the European context the responsibility to stimulate the uptake of MOOCs must be shared between government agencies, academic and non-academic institutions, employers, and other concerned stakeholders. Policy and decision makers of all stakeholders involved need to be in a better position to understand the “MOOC phenomenon,” capitalise on the advantages of these large-scale courses and use them as a strategic opportunity to help 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. The recent UNESCO-COL publication(2016) is in this respect a call to re-vitalise the role MOOCs play in different society goals.

## Introduction

Although European higher education institutions (HEIs) are aware of the importance of MOOCs as a global movement and an instrument for educational policy, many have been hesitant to adopt or engage with MOOCs. It is indicated (e.g., Yuan, Powell, & Olivier, 2014) that pedagogical issues, strategic and cost questions are among the concerns that have delayed European HEIs from entering into this movement.

One of the MOOC projects funded by European Commission, entitled as Higher Education Online: MOOCs the European way (HOME, 2014) is developing and strengthening an open network for European cooperation on open education and MOOCs. As part of the HOME project, a survey study (Jansen & Schuwer, 2015a, Jansen, Schuwer, Teixeira, & Aydin, 2015b) was conducted in 2014 to contribute to the literature by providing an insight about European perspectives on MOOCs. In addition the HOME project started with this survey to contribute to a better understanding of the strategic reasons why a higher education institution is or isn't involved in MOOCs, and to compare these reasons with the results of similar studies in U.S. (Allen & Seaman 2014, 2015, 2016).

Based on the 2014 survey it was indicated that the European HEIs are more broadly involved in MOOCs compared to the U.S. institutions and also that their reasons to invest in this new format differs in some aspects as well (Jansen & Schuwer, 2015a, Jansen et al., 2015b). These results call for confirmation by subsequent European studies and by further research into the reasons behind the clear difference between US and EU perspectives.

As such the HOME project was contacted by three other organisations asking for collaboration and/or to re-use some of the questions of the 2014 survey. First REFAD, a French Canadian distance education agency with 27 member institutions in its network, agreed to collaborate closely to the HOME project. REFAD agreed to align their time path and decided to join the HOME survey of 2015. They provided the French translation of the 2015 survey 'Comparing institutional MOOC strategies' amongst their members and complemented this survey with some interviews amongst their members. The response of all Canadian HEIs is incorporated in this report, the separate REFAD report only presents the results amongst their members (REFAD, 2016).

Secondly, JRC-IPTS decided to incorporate some of the 2014 survey questions in their survey on open education in Europe conducted in 2015 (Muñoz et al., 2016). They performed post-data correction to correct for several biases related to involved in MOOCs and Open Education and to region and type of HEIs. Thirdly, a PhD student conducted a study into the impact of MOOCs and re-used several questions of the survey as well (Little, 2016). In addition the HOME project adapted two of his questions related to impact.

Consequently, the number of studies on MOOCs increased in such way that the results and conclusions of Jansen & Schuwer (2015) can be better validated and compared to similar studies in both Europe and the U.S. Therefore this report not only presents the results of the 2015 Survey of the HOME projects but also compares these with the other studies as described here above.

## Methodology

An online survey instrument was used to collect data from HEIs mainly from Europe and French Canada. This survey was conducted during the fourth quarter of 2015 and was largely a repetition of the survey from 2014 (Jansen & Schuwer, 2015a). In order to have a base to compare the results of this study with the Babson Group's results (Allen & Seaman 2014, 2015, 2016), quite a number of questions were adapted from the instrument used by the Babson Group. Most questions were kept identical to the 2014 survey. Some additional questions were developed during the summer of 2014 and tested among HOME partners (mainly related to section 6 and 7). After finalising the English version (see Annex 1), the survey was translated into French and Turkish. A Google form offering those three languages was open from 15th October to 4th January 2016. Higher education institutions were in general approached by personal contact and by the use of newsletters and social media to complete the questionnaire.

The survey consists of the following 9 sections (annex I includes the complete survey):

1. Profile Information  
(8 open question)
2. Status of MOOC offering, main target group and impact on institution  
(5 questions with various answer categories, 3 identical questions as used in the US surveys )
3. Do you agree with the following statements?  
(4 identical questions as used in the US surveys and an optional open question)
4. Primary objective for your institution's MOOCs  
(1 question with 9 options identical to US survey)
5. Relative importance of the following objectives for your institution's MOOCs  
(4 closed question on 5 point Likert scale plus an open question)
6. What are the primary reasons for your institution to collaborate with others on MOOCs?  
(a list with 24 possibilities and 1 open question)
7. What are the primary reasons for your institution to outsource services to other (public and/or private) providers on MOOCs?  
(a list with 24 possibilities and 1 open question)
8. How important are the following macro drivers for your institutional MOOC offering?  
(10 closed question on 5 point Likert scale)
9. How important are the following dimensions of a MOOCs?  
(15 closed question on 5 point Likert scale)

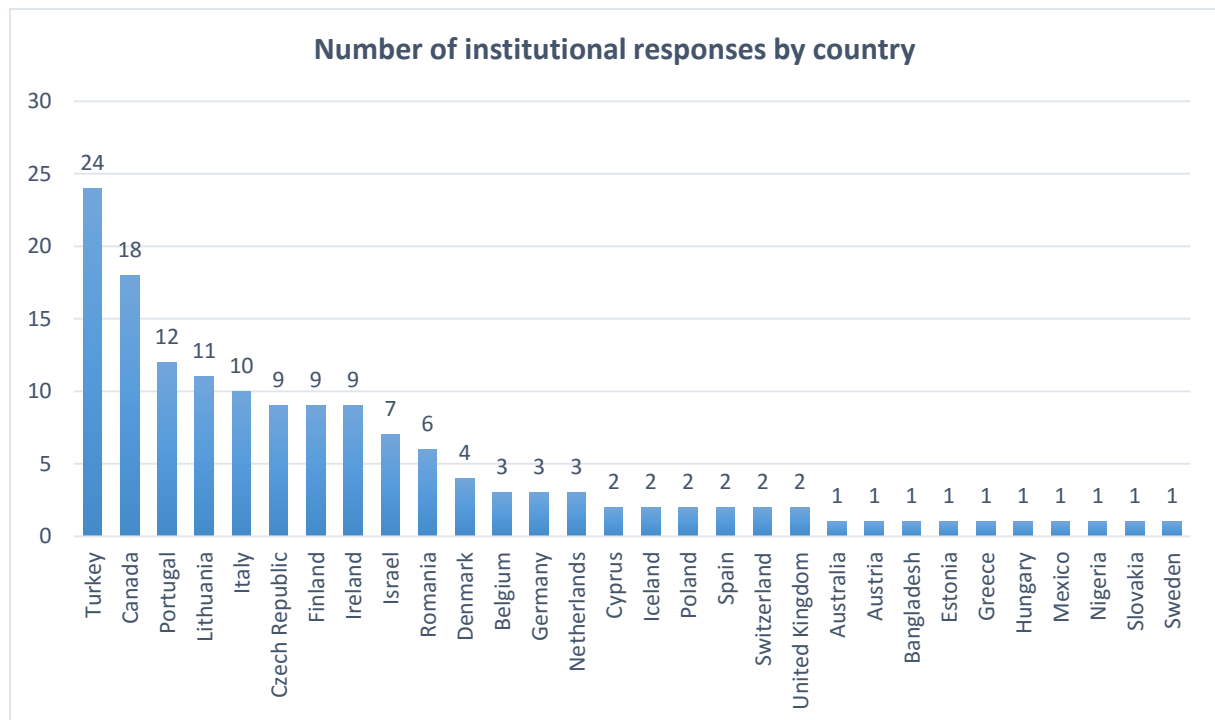
Most closed questions could be scored on a 5-point scale ranging from *Not at all relevant for my institution* to *Highly relevant for my institution*. Exceptions are those closed questions that were



included from the US survey (Allen & Seaman 2014, 2015, 2016). These questions were kept identical with those in their survey, so comparisons could be made.

## Response and Institutional profiles

In total 168 institutions responded out of 30 countries. This was corrected to a) include only HEIs which are part of the formal HE structure of the country of origin and b) only one response per institution, i.e. select the one most representative to answer the questions. So the response in total is 150 HEIs. Figure 1 shows the amount of institutional responses per country.



**Figure 1:** *Number of institutional responses by country*

In this years' report the responses of HEIs of all countries are included, especially the inclusion of French Canada in collaboration with REFAD. Hence, in contrast to the 2014 survey the response as such does not represent the European Bologna area only. Only 3% of the respondents are related to countries outside the European Bologna area and French Canada. The European Bologna area still makes 85% of the total response. As such the results in this survey to a large extend can be compared to the 2014 survey (Jansen & Schuwer, 2015). The differences between countries are discussed as well, limited to those countries where the response can be seen as representative.

Separately the following country reports are available for Turkey (Aydin, 2016), French Canada (REFAD, 2016), Czech Republic (Rohlíková, Rohlík, Jansen, & Goes-Daniels, 2016), Lithuania (Rutkauskiene, Gudoniene, Jansen, & Goes-Daniels, 2016), Finland (Lehto, Jansen, & Goes-Daniels, 2016), Israel (Kalman, Jansen, & Goes-Daniels, 2016) and Ireland (Brown & Costello, 2016). Additional report for Portugal and Italy are under development.

## Comparison with similar studies

In this report some results are compared with other studies, to similar audience, using exactly the same questions. The abbreviations US2013, US2014 and US2015 refer to the US studies published a year later (Allen & Seaman 2014, 2015, 2016). EUA (2013) refers to the European survey in 2013 published by Gaebel, Kupriyanova, Morais, & Colucci (2014), EU 2014 (all) to results of Jansen et al. (2015a, 2015b), IPTS (2015) to those published by Muñoz et al. (2016) and the results of this survey are referred to as S2015. As such the year mentioned in these abbreviations refer to the year the survey was conducted.

Table 1 summarizes the main characteristics of these seven surveys. The main difference is that the other surveys are self-selected while EU2014 and S2015 was open to European HEI. The HEIs in the EU2014 are limited to the Bologna Area while S2015 includes French Canada and a limited response (3%) from other countries. In addition, EU2014 and S2015 was about MOOCs only while the other surveys have a broader scope focussing on e-learning, online learning or open education as well.

Table 1 *Survey Characteristics of Different MOOC Studies*

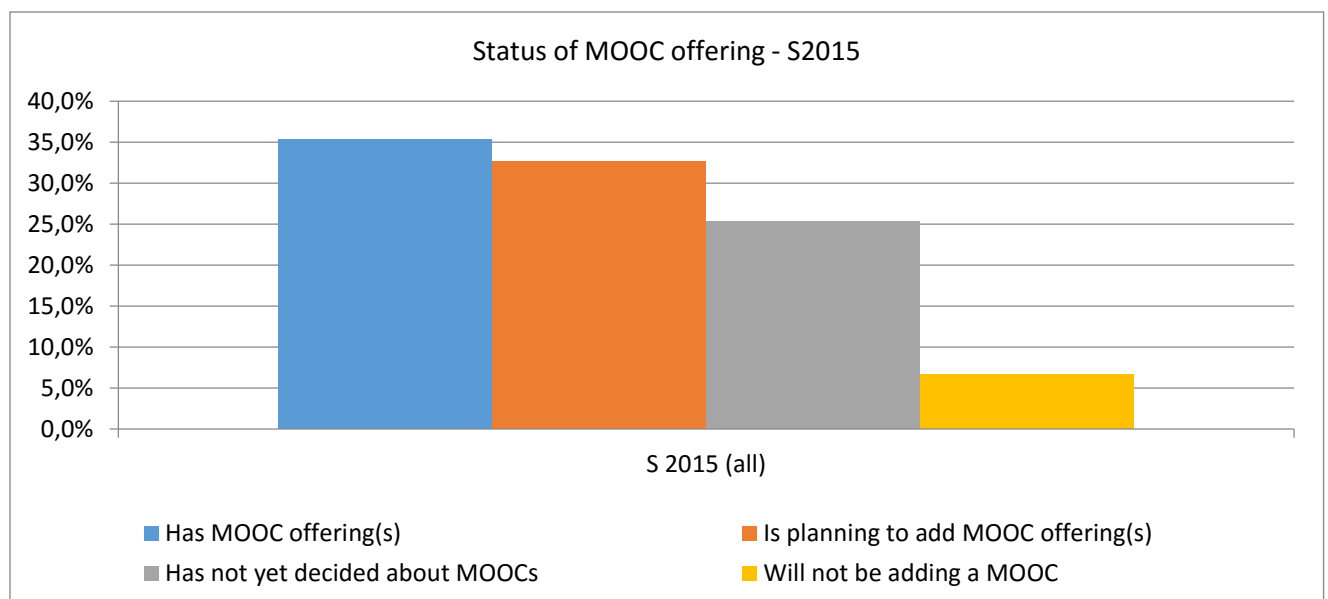
<i>Survey</i>	<b>Sample methodology</b>	<b>Total sample</b>	<b>Institutions Responded</b>	<b>Institutions answering MOOC questions</b>
<i>US2013</i>	Self-selected sample	4.726 in U.S.	2.831	Only institutions that had MOOC offering or plans: 405 institutions (14.3%)
<i>US2014</i>	Self-selected sample	4.891 in U.S.	2.807	Only institutions that had MOOC offering or plans: 382 institutions (13.6%)
<i>US2015</i>	Self-selected sample	All degree-granting HEIs open to public		No MOOC questions anymore (only question on status of MOOC offering)
<i>EUA2013</i>	Self-selected sample (EUA members)	800 in Bologna Area	249	All 249
<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>IPTS2015</i>	Self-selected sample	Only selected HEIs France, Germany, Poland, Spain and the UK	178	Neff 118

All studies are biased to some extent. The US surveys are biased to the large institutions while EAU2013 is biased in favour of EUA member institutions involved in e-learning. EU2014 seems to be biased to those countries and those institutions interested in MOOCs. The IPTS2015 study performed post-data correction to type of HEIs, to region and to involvement in open education (Muñoz et al., 2016).

In addition the HOME project collaborated with a Phd Student of Sheffield University on his MOOCs survey (Little, 2016). That survey focusses on the institutional impact of MOOCs. His survey was mainly targeting the different levels of staff of replying institutions. As a consequence his survey has more than one answer per institute. His total response was 572 (217 respondents filled in completely) of which about 78% originates from the UK, 5% from Australia and 17% from other countries. Preliminary results are published online (Little, 2016). During the collaboration we decided to reuse some of each other’s questions. During this report some of the results of this survey will be compared with our survey results.

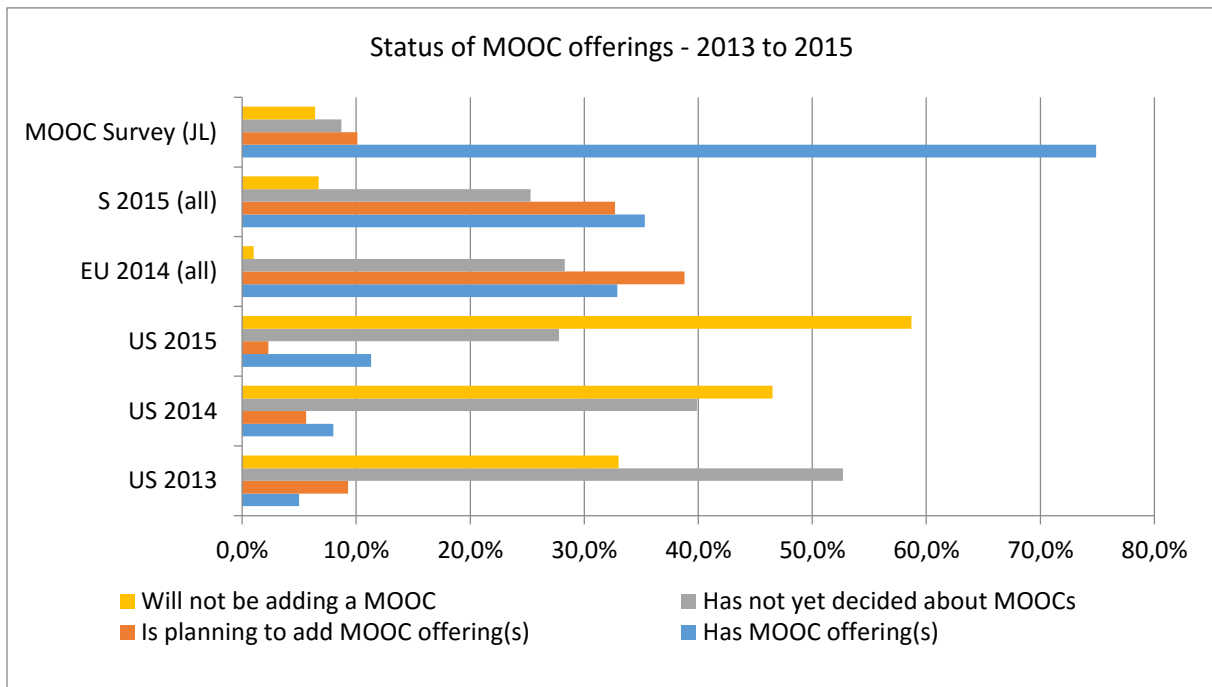
### Status of MOOC offering

From the participating institutions 35% are offering a MOOC and 32% are planning to add MOOC offerings. Figure 2 shows these outcomes for the 2015 Survey.



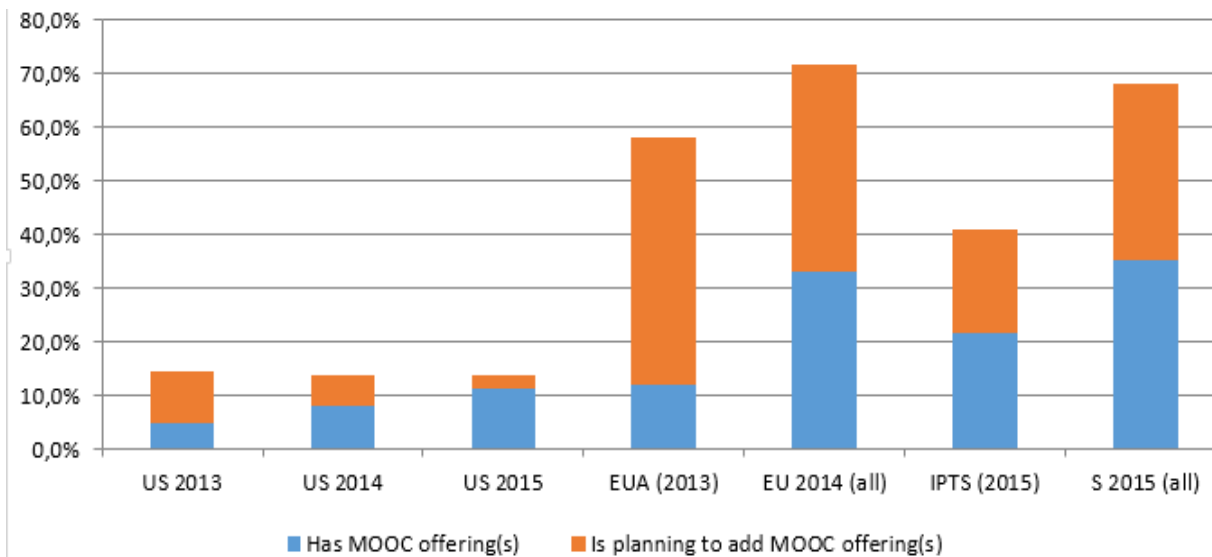
**Figure 2:** Institutional profile in their MOOC offering for this survey (S 2015)

In figure 3 the institutional profile in MOOC offering is compared to this overall study (S 2015), the European studies (EUA 2013, EU 2014), the US surveys of the last three years (US 2013, US 2014, US 2015) and to the MOOC Survey of James Little (JL) and in figure 4 we did the same comparison with the IPTS study 2015 but now only for the options ‘has MOOC offerings’ and ‘is planning to add MOOC offerings’.



**Figure 3:** Institutional profile in their MOOC offering for this survey (S 2015)

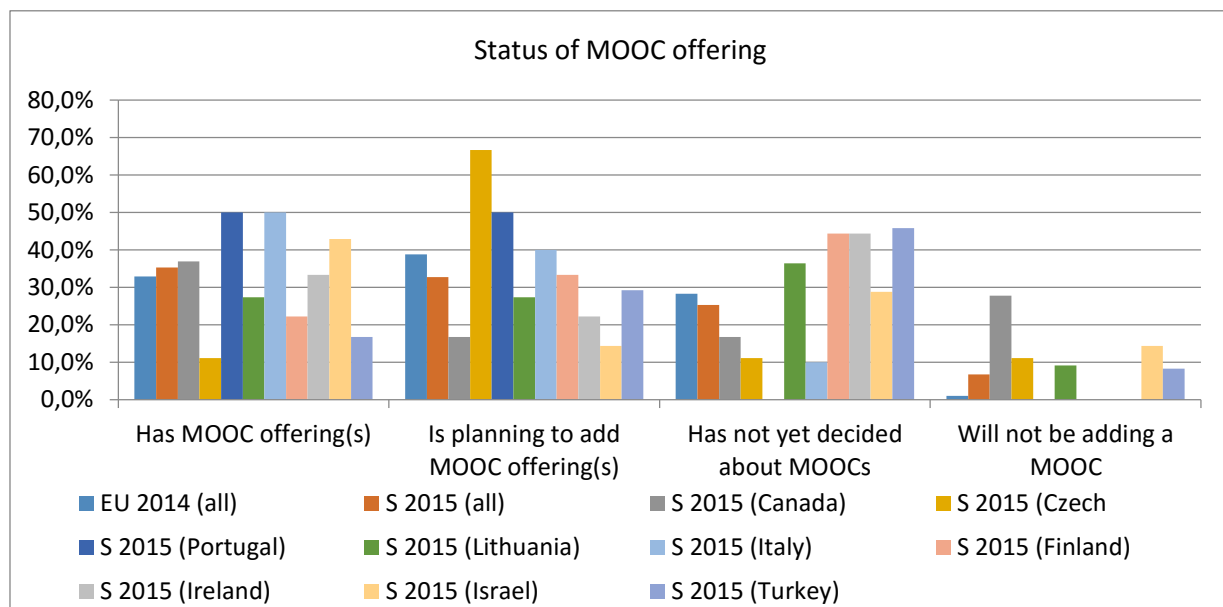
MOOC Survey of Little (2016, JL in figure 3) is biased by the fact that he addresses mainly institutions that already offer or plan to offer MOOC's. This is logical because he studies the impact of MOOCs.



**Figure 4:** Institutional profile in their MOOC offering compared between that of US surveys (US 2013, US 2014 and US 2015), the EU surveys (EUA 2013, EU 2014), Muñoz et al. (IPTS 2015) and this survey (S 2015)

All these studies confirm the conclusion of the 2014 survey (Jansen & Schuwer, 2015) that European institutions are more involved in MOOCs compared to the US.

Figure 4 presents the results of the seven surveys (without the James Little survey) on exactly the same question on the status of MOOC offering of Higher Education institutions (HEIs). The differences between U.S. and Europe are striking. While in the U.S. the number of HEIs have a MOOC or planning to add MOOC offering is stable at 12-13% for the last three years, European HEIs seem much more involved with in general over 45% of HEIs (planning to) offer MOOCs. Although differences between European countries are reported (IPTS (2015): ranging from 25% in Germany to about 60% in France; Jansen et al. (2016): 45% in Turkey to 90% in Italy and Portugal) in general these studies demonstrate that the "interest in MOOCs has far from peaked in Europe" (Gaebel et al. 2014, p54).



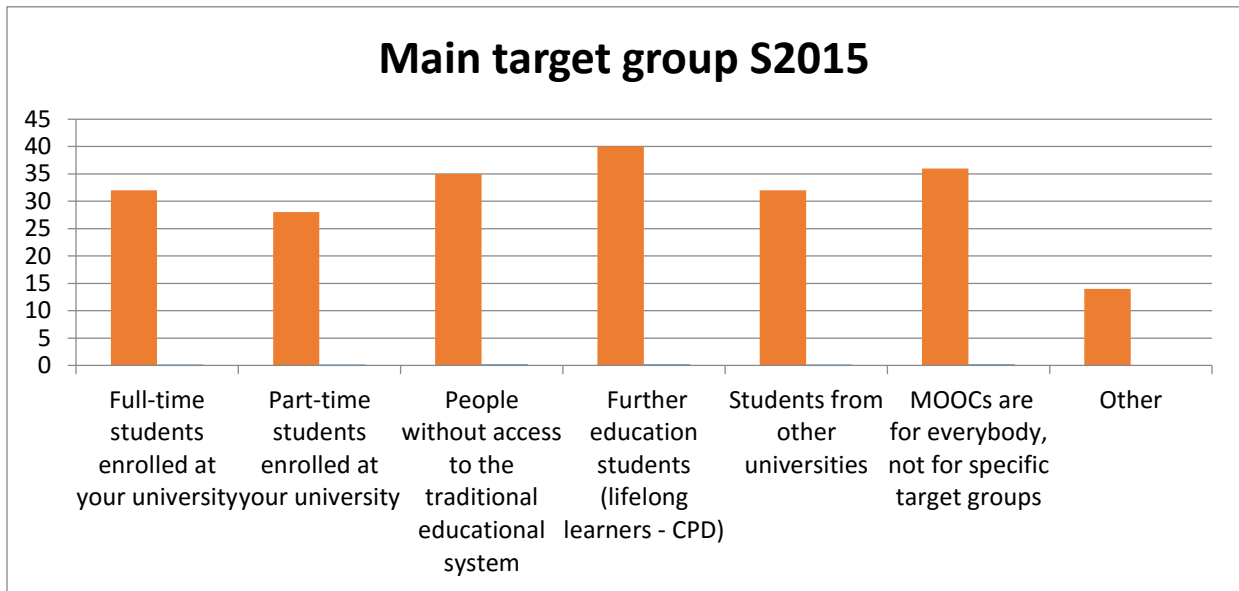
**Figure 5:** Institutional profile in their MOOC offering for countries compared between that of the EU surveys 2014 (EU2014 all) and this survey (S 2015 all)

Figure 5 shows the results of the comparison of nine countries (with the largest response) with the results of the survey EU2014 and the results of this survey S2015. Here it shows that HEIs in most countries have a MOOC or are planning to have a MOOC and this is almost the same as the overall conclusion of S2015 (67%) and much higher than in the US 2015 (12-13%).

Jansen et al. (2015b) poses the thesis that these large differences between U.S. and Europe might be related to the differences between higher educational systems. Although speculative there is reason to believe that the case for MOOCs in Europe is linked to the long tradition of promoting life-long learning and access to higher education. With the notable exception of the United Kingdom it needs to be noted that in Europe higher education is still largely framed from a policy perspective as a public good, as distinct from private or personal commodity. As in continental European HEIs are strongly state funding - most institutions have equal resources, the market-based US model has mixed private-public funding and provision with large differences between HEIs. This tradition along with major differences in the business model for higher education, the availability of European Commission funding for MOOCs, and the mechanism of the European Credit Transfer System (ECTS) may help to explain such differences. These differences are also reflected in institutional policies, as discussed later in this report.

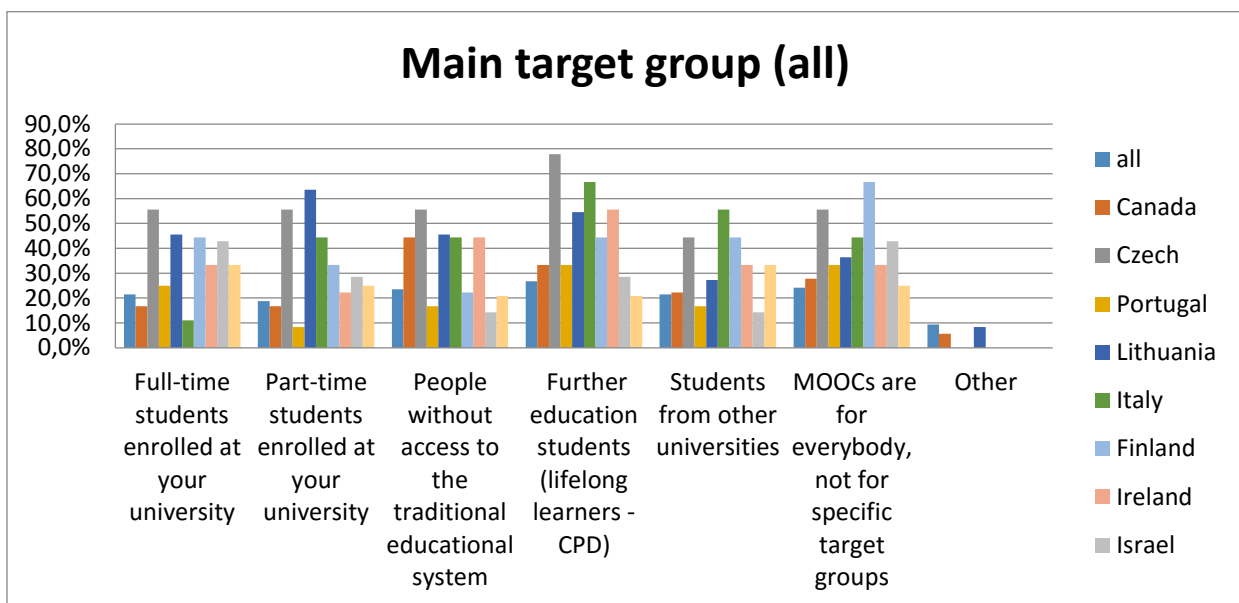
## Target group and impact of MOOC offering

Figure 6 shows that according to the HEIs that responded, no distinctive target group is seen as most important. Although a small preference is given to the main target group 'lifelong learners-CPD' followed by 'people without access to the traditional educational system' and 'MOOCs are for everybody, not for a specific target group'.



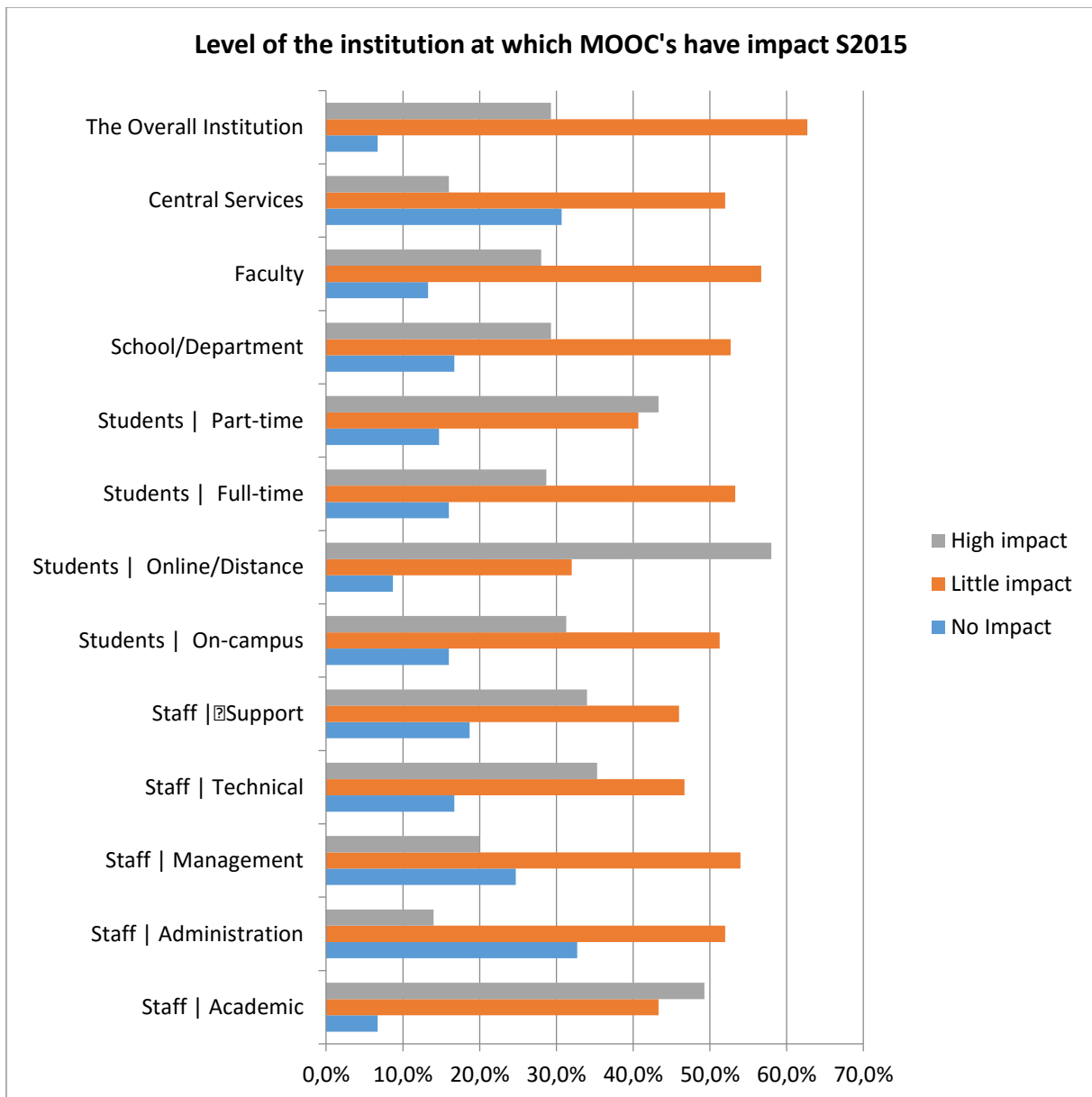
**Figure 6:** Main target groups for MOOC offering

Additionally we see in figure 7 the group countries with the largest response compared with the overall group and here we see some differences between the main target groups. For instance for Finland the main target group is 'MOOC's are for everybody not for a specific target group' and for Lithuania the main target group is 'Part-time students not enrolled at your university'. Possible reasons for these differences are described in the various country reports.

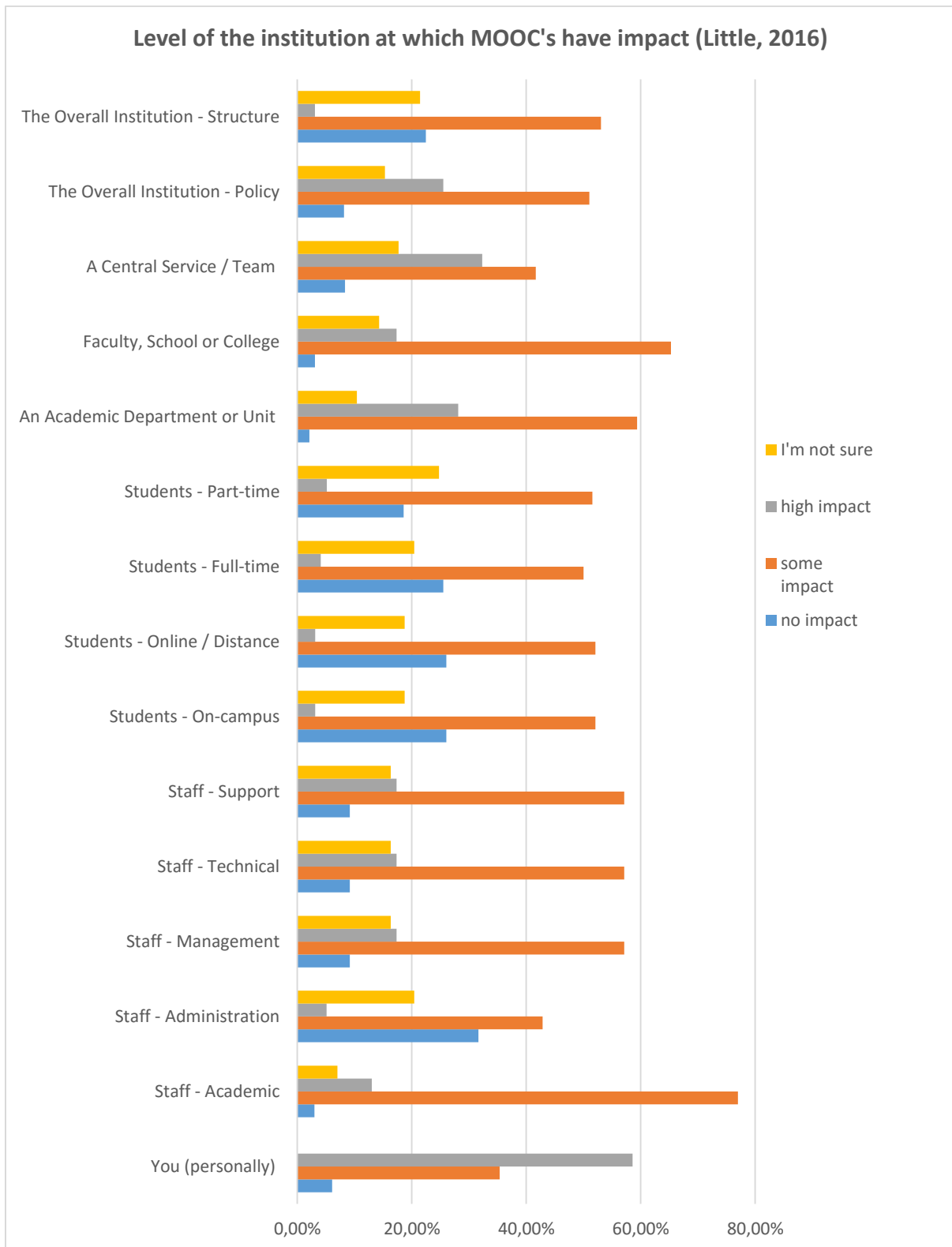


**Figure 7:** Main target groups for MOOC offering for nine countries compared with the overall group (S2015)

Figure 8 shows that the impact of MOOCs in different levels of the institution is the highest in three categories: the online/distance students, the academic staff and at part time students. The impact on technical staff and support staff is regarded as less important but still high, and the impact on the other levels is considered low (30% and less). There is a relative high response on answer ‘no impact’- on ‘central services’ and ‘staff administration’, but overall the respondents expect that MOOCs have (little or high) impact as all level of HEs.



**Figure 8:** *Impact that MOOC offering has at levels of the institution S2015(all)*



**Figure 9:** *Impact that MOOC offering has at levels of the institution (Little, 2016)*

Figure 9 shows the impact on the institution levels for the institutions in the James Little Survey (Little, 2016). As mentioned before these are mainly institutions that have of are planning to offer MOOCs and response represent many persons per institution. In this survey the highest impact is on personal level next to (expected) impact to occur in academic staff, faculty and overall institution

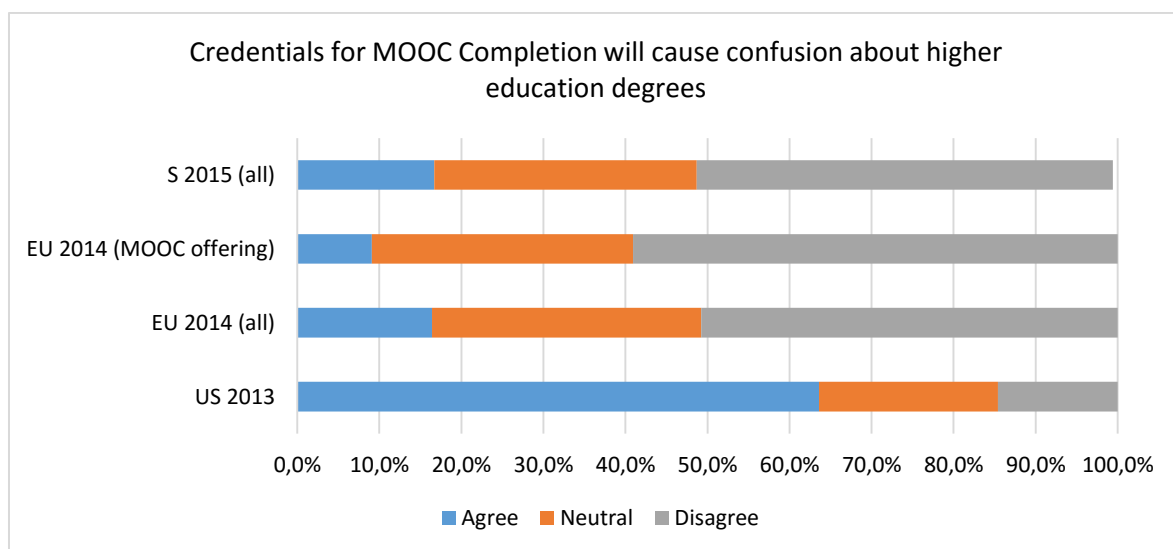


policy. One might question if people are reporting an impact through the lens of highlighting change needed or through actual change occurred. This might explain some differences between both surveys (as shown in figure 8 and 9).

However, it is concluded from both surveys that respondents are convinced that MOOCs indeed has some/large impact at many different levels of the higher education institution.

## Role of MOOCs compared to US and EU

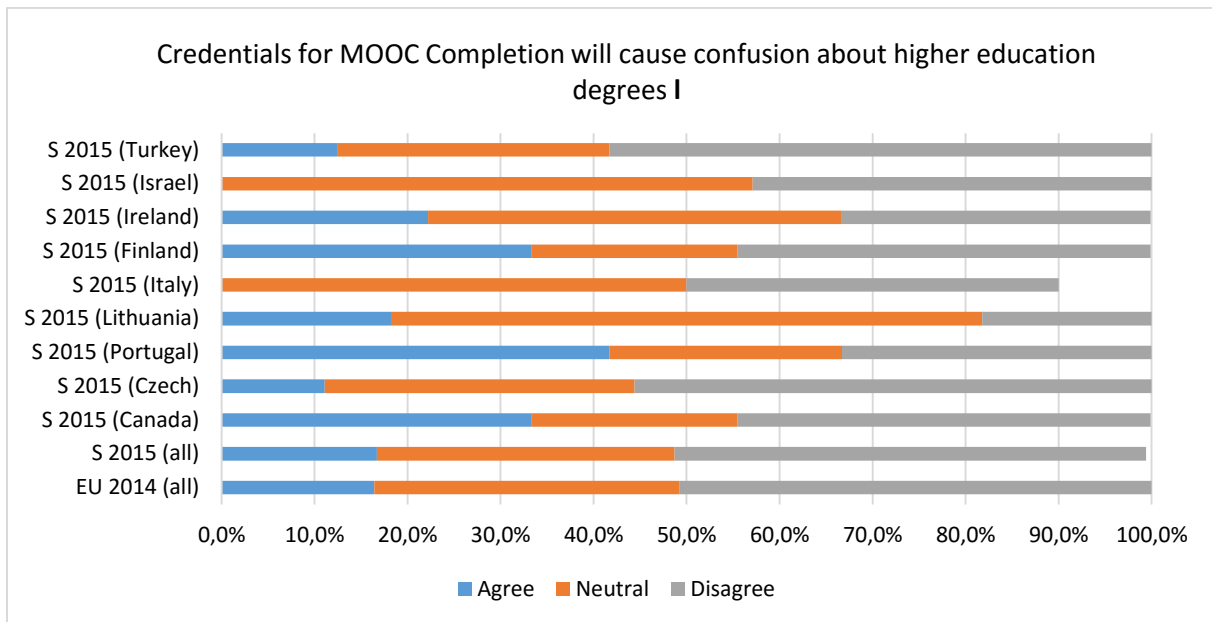
Here we discuss the results of section 3 of the survey that encompasses four identical questions as used in the US 2013 survey (Allen & Seaman, 2014). Only two of those four questions were repeated in their US 2014 survey (Allen & Seaman, 2015). Figure 10 lists the results of the question if *credentials for MOOC completion will cause confusion about higher education degrees*.



**Figure 10** Replies to the question “Credentials for MOOC completion will cause confusion about higher education degrees?” compared between that of US survey (US 2013), the EU survey (EU 2014 all) and the overall survey (S2015)

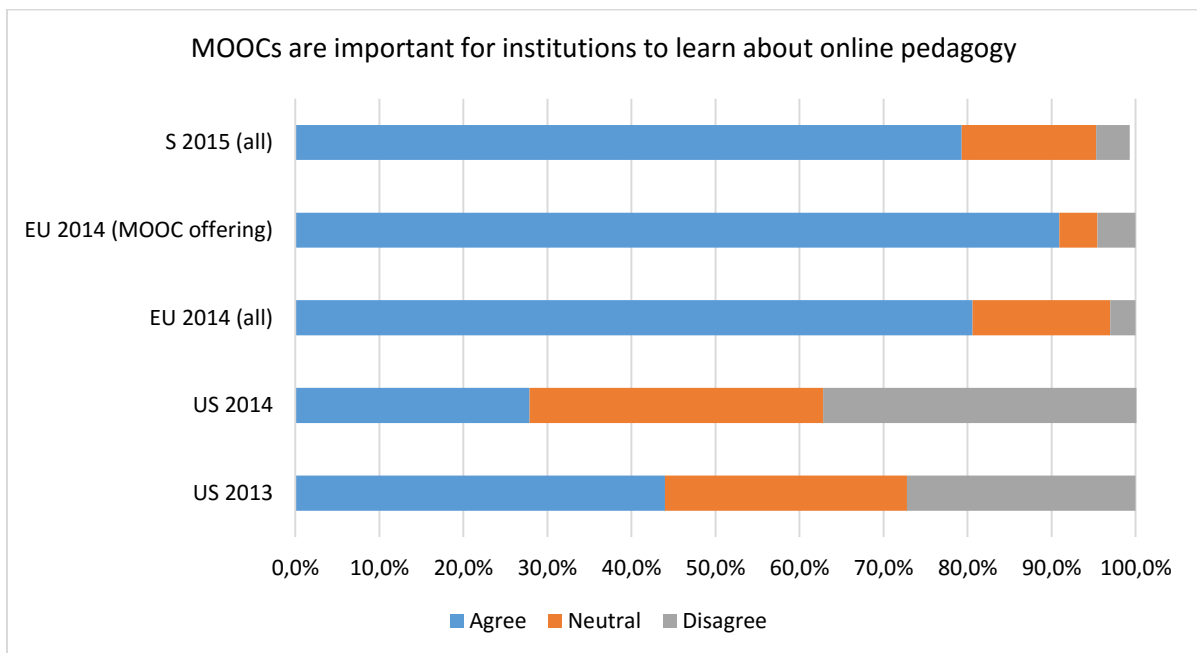
The US responds more positive on this question than the EU. So they feel more confusion than the respondents in the other surveys.

Figure 11 compares the results on this question from the nine, formally mentioned, countries with the overall results from EU2014 and S2015. Here we see that Lithuania is the most concerned about MOOCs causing confusion about higher education degrees and Italy, Turkey and Czech Republic the least (in Italy has not every respondent answered this question).



**Figure 11** Replies to the question “Credentials for MOOC completion will cause confusion about higher education degrees?” of nine countries compared with the EU survey (EU 2014 all) and the overall survey (S2015)

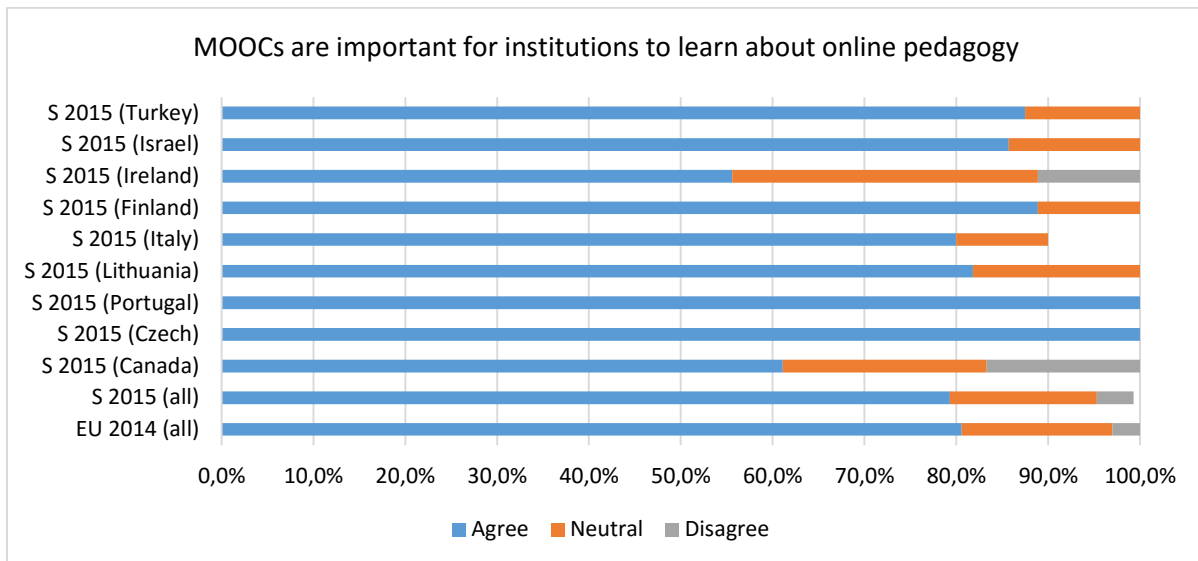
The next question in this section was *MOOCs are important for institutions to learn about online pedagogy*. Figure 12 shows the response on this question.



**Figure 12:** Replies to the question “MOOCs are important for institutions to learn about online pedagogy” compared between that of US surveys (US 2013, US 2014), the EU survey (EU 2014) and this survey (S2015).

The respondents in the 2015 survey, like the EU respondents in the previous 2014 survey, are most positive about the use of MOOCs to learn about online pedagogy. In the US the respondents think more neutral about this issue.

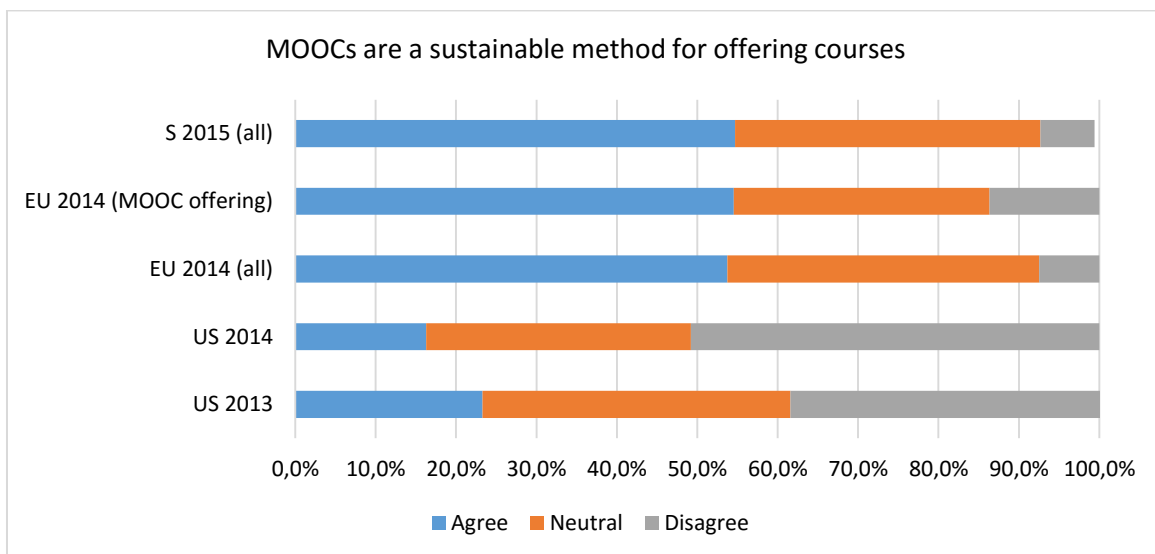
Figure 13 shows the comparison of the results on the question above between the nine countries and the EU survey (EU2014 all) and this survey (S2015 all).



**Figure 13:** Replies to the question “MOOCs are important for institutions to learn about online pedagogy” for nine countries compared with the EU survey (EU 2014) and this survey (S2015).

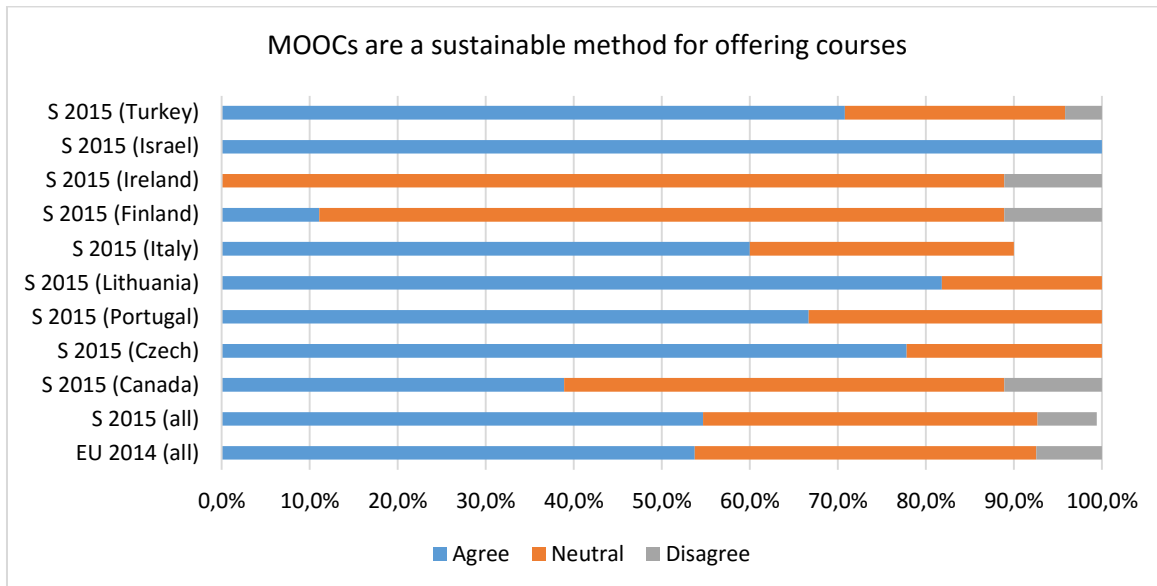
Here we see that Portugal and Czech Republic are the most positive about this question and you see that all the countries are Ireland and Canada think less positive than the overall group.

Figure 14 lists the results of the question if MOOCs are a sustainable method for offering courses. While in the US the opinion is mostly neutral or disagree, more than half of the institutions of the EU agrees. This is again confirmed in the 2015 survey (S2015). These results might be related to the relative large involvement in MOOCs offering as shown in figure 2 (status of MOOC), i.e. HEIs in those surveys have in general a positive experience/attitude.



**Figure 14:** Replies to the question “MOOCs are a sustainable method for offering courses” compared between that of US surveys (US 2013, US 2014), the EU survey (EU 2014) and the overall survey (S2015)

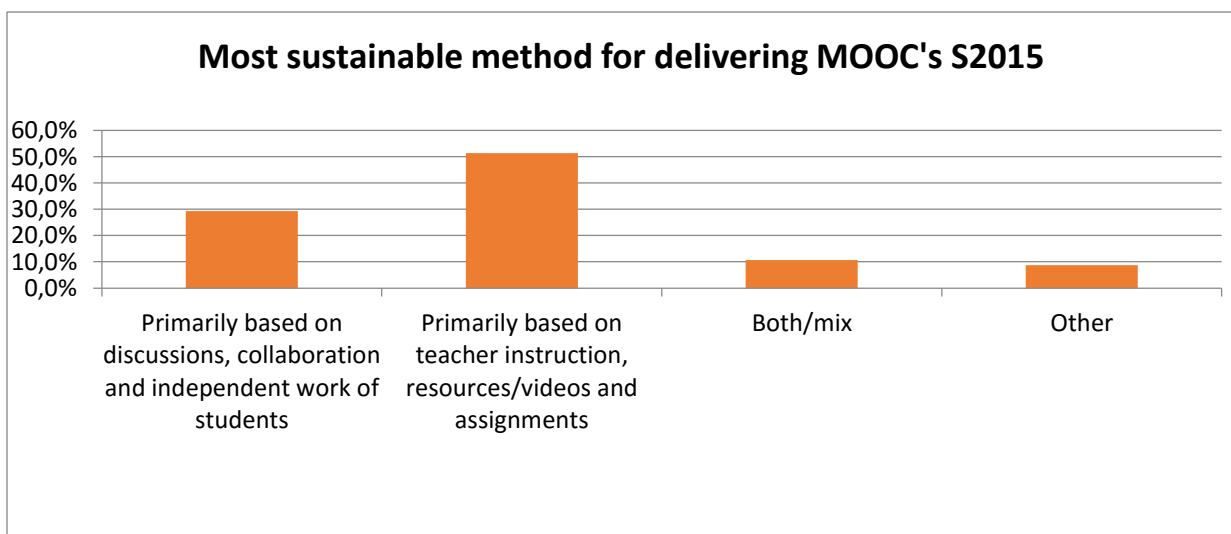
The answers on this question for EU2014 and S2015 we also compared with those from the nine countries. The results are shown in figure 15.



**Figure 15:** Replies to the question “MOOCs are a sustainable method for offering courses“from the nine countries compared with the EU survey (EU 2014) and the overall survey (S2015)

It shows that Israel is the most positive about the statement that MOOCs are a sustainable method for offering courses and Ireland thinks very neutral about this. Canada is also less positive than the overall group.

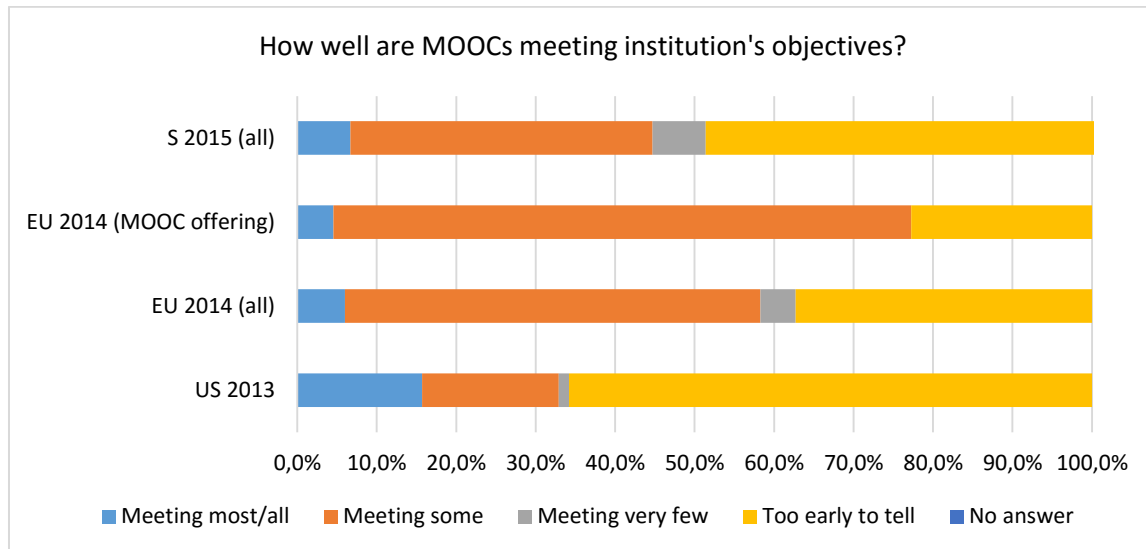
Figure 16 illustrates the response to the question, *what is the most sustainable method for delivering MOOCs*. Half of the respondents prefer to deliver MOOCs based on teacher instruction, resources/videos and assignments. Delivering MOOCs based on discussions, collaboration and independent work of students gets less support – it is supported by almost 30% of the respondents. And only 10% of the respondents prefer mixing all the previously mentioned methods in a MOOC.



**Figure 16:** Most sustainable model for delivering MOOCs

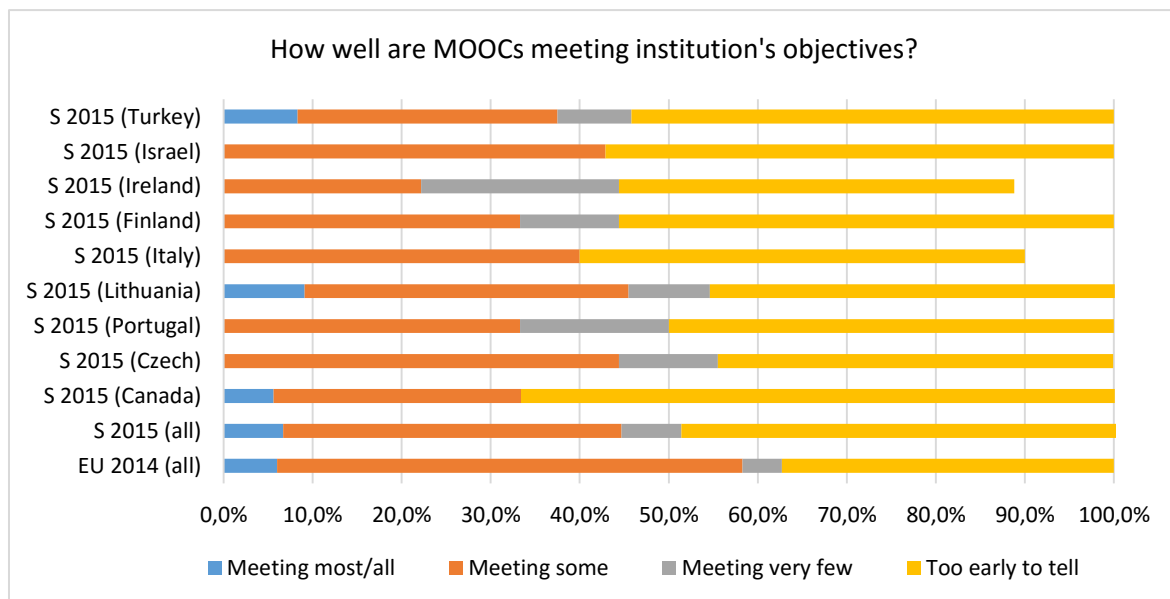
## Institutional objectives on MOOCs

Figure 17 shows the results of the question *how well MOOCs are meeting institution's objectives*. Again, this question is not repeated in the latest US surveys (Allen & Seaman, 2015&2016). It shows that in the US people think it is too early to tell if MOOCs are meeting institutional objectives. The institutions in the overall survey show however that there is a positive attitude about this question.



**Figure 17:** Replies to the question “How well are MOOCs meeting institution's objectives?” compared between that of US survey (US 2013), the EU survey (EU 2014) and the overall survey (S2015)

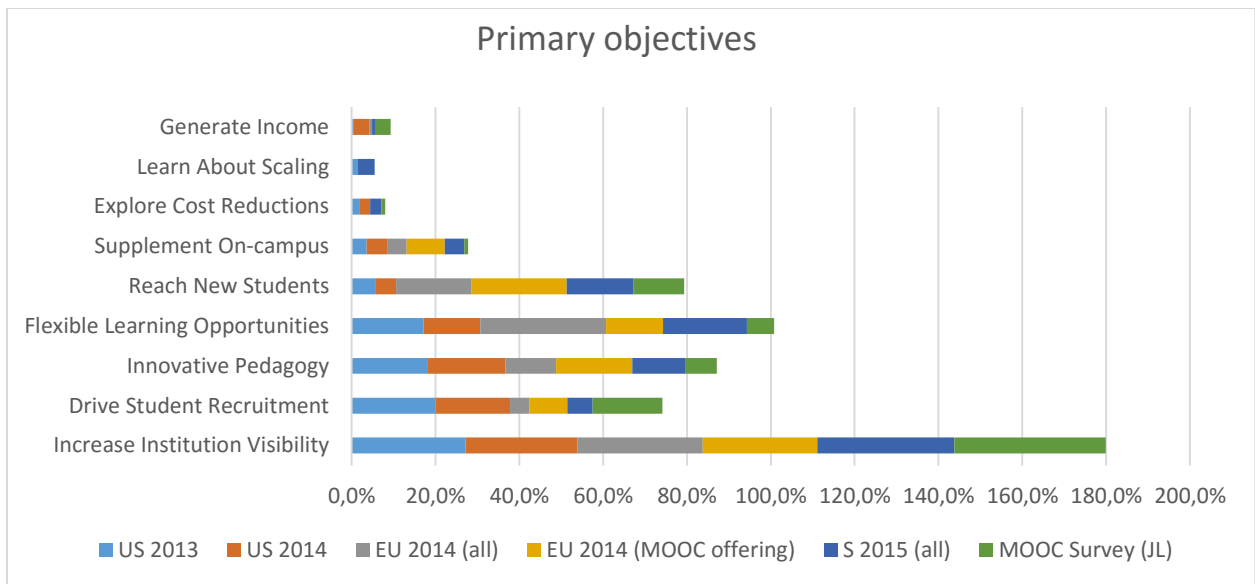
To see if this counts also for the countries most involved, we compared their results with the overall results of EU2014 and S2015. Figure 18 shows these outcomes. Here we see that only Turkey and Lithuania are slightly more positive about this question than the overall group. In general 45-55% the respondents feel that it is too early to tell.



**Figure 18:** Replies to the question “How well are MOOCs meeting institution's objectives?” from nine countries compared with the EU survey (EU 2014) and the overall survey (S2015)

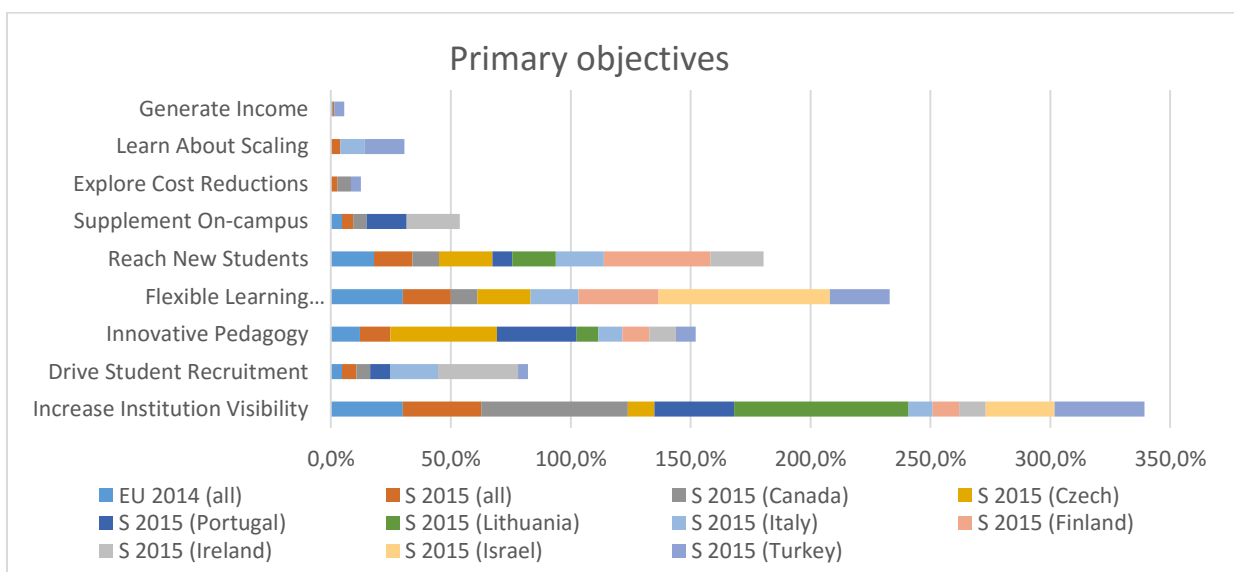
The figures above raise the question if the institutional objectives between US and Europe are also different. So figure 19 shows the primary objectives to offer a MOOC, indicated by institutions. The item ‘increase institutional visibility’ is the most chosen, followed by ‘flexible learning opportunities’. In all surveys, the objectives related to finance (explore cost reduction, generate income) and scalability dimensions of MOOCs are not regarded as primary objectives.

Note that the objective “Drive student recruitment” is seen as important in the US but not so in the other surveys. This in contrast to ‘reach new student’ that is seen as relative important except in the US.



**Figure 19:** Primary objectives to offer a MOOC compared between that of the US surveys (US 2013 and US 2014), the EU survey (EU 2014), MOOCs survey (JL) and the overall survey (S2015)

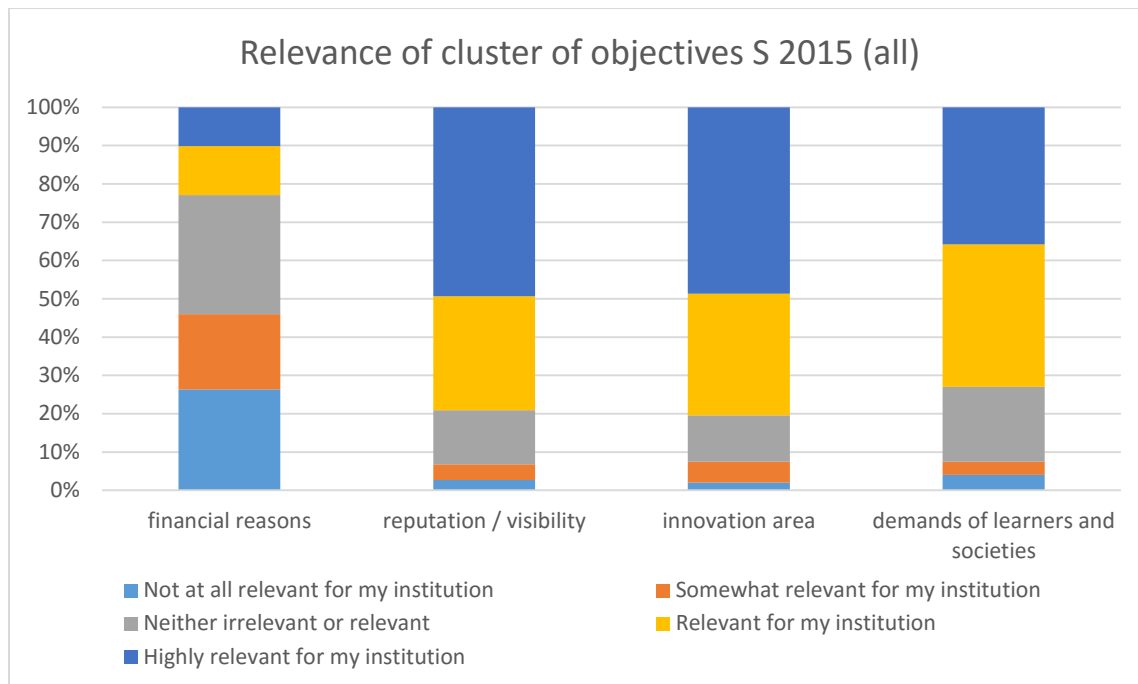
We compared the responses on this question from the nine countries also with the EU2014 and S2015 responses. See figure 20.



**Figure 20** Primary objectives to offer a MOOC from the nine countries compared with the EU survey (EU 2014) and the overall survey (S2015)

Here we also see that the objective ‘Generate income’ is the least mentioned and ‘Increase institution visibility’ the most. However, some differences between countries are observed as ‘flexible learning opportunities’ are seen as very important in Czech republic, ‘increase institution visibility’ is relatively most important in Canada and Lithuania and reach new students in Finland. Details on this are discussed in the various country reports.

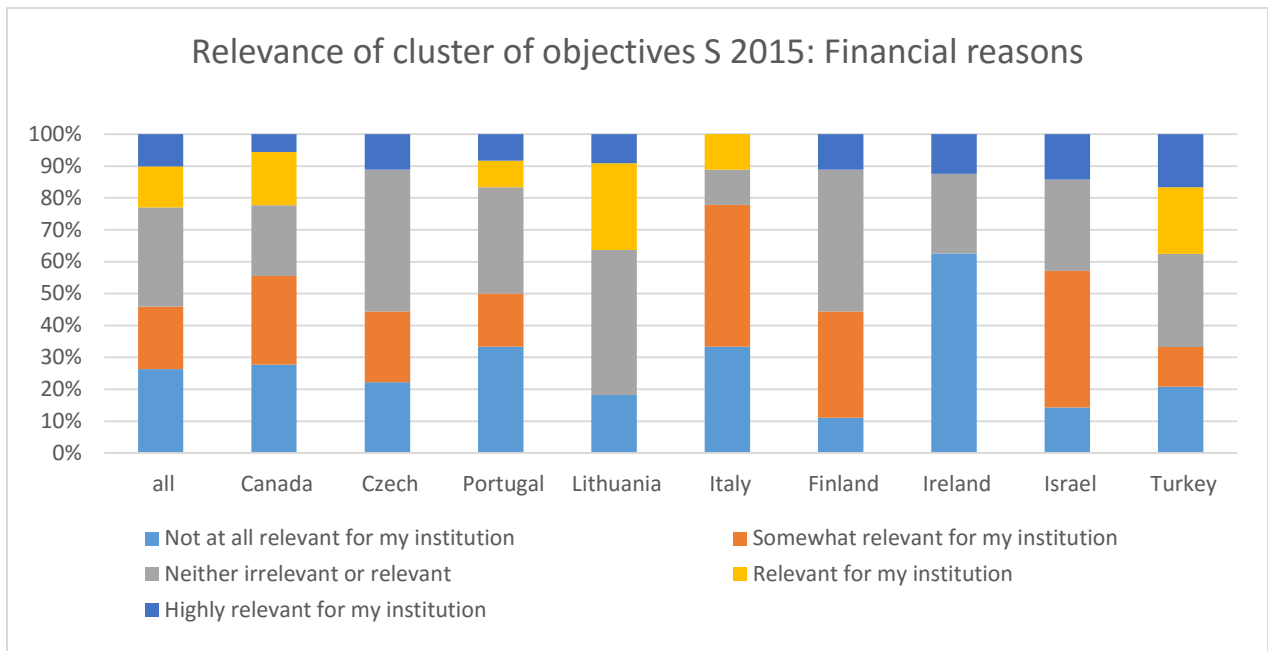
Figure 21 shows the relevance per cluster objectives for institutions for the 2015 survey. The rationale behind these clusters are extensively discussed in Jansen and Schuwer (2015).



**Figure 21:** *Relevance of four different clusters of objectives (S2015).*

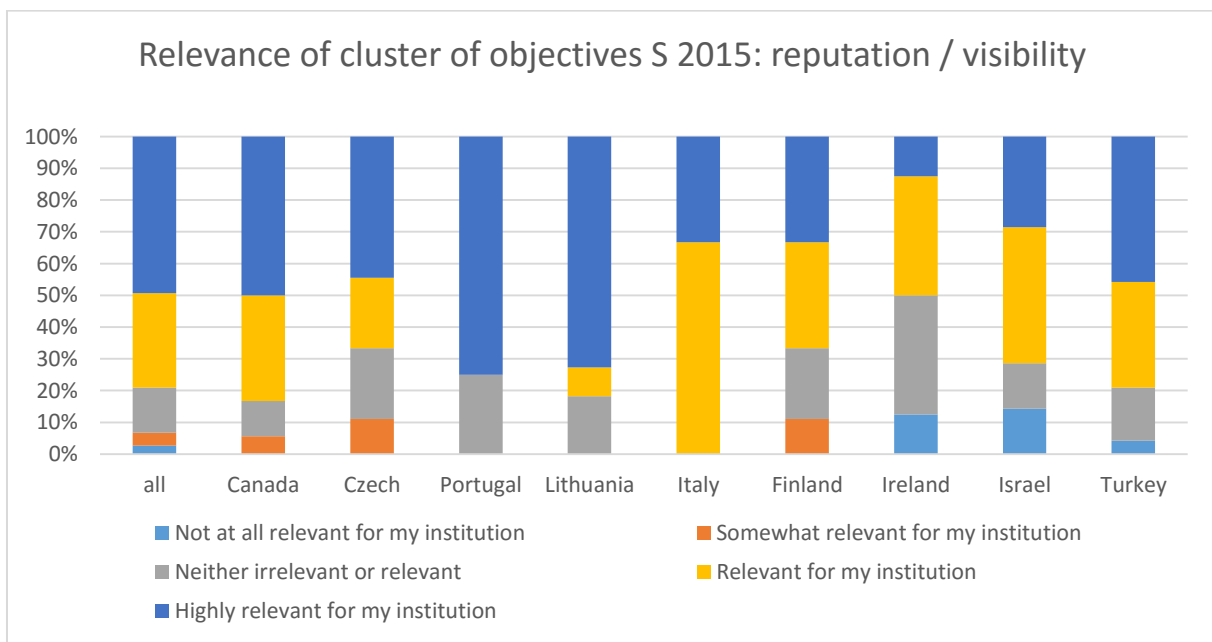
In this figure we see that the relevance of reputation/visibility and innovation area are almost equal and the most high. Demands of learners are slightly less relevant. The least relevance for having a MOOC are financial reasons.

We compared the answers of the nine countries on the relevance with the overall results of S2015. Figure 22, 23, 24 and 25 show these results for each of these cluster of objectives.



**Figure 22:** Relevance of financial reasons for nine countries compared with all (S2015).

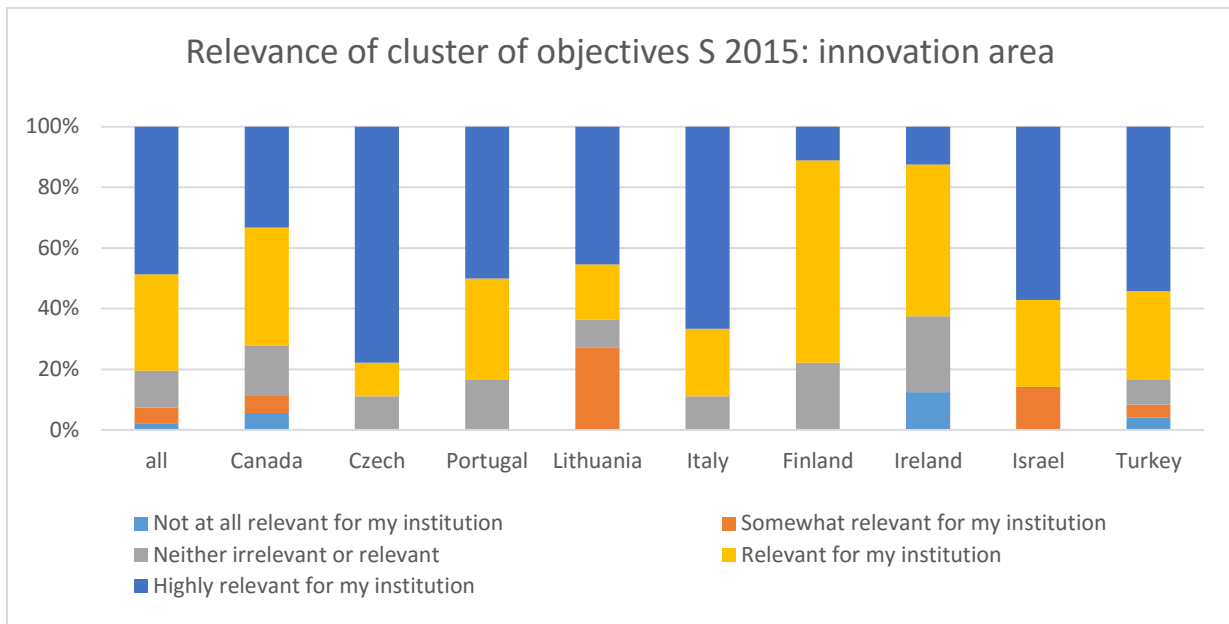
Lithuania and Turkey are relatively more positive about financial reasons as an institutional objective than the rest of the countries and than overall. The respondents of Ireland think financial reasons are the least relevant.



**Figure 23:** Relevance of reputation/visibility for nine countries compared with all (S2015).

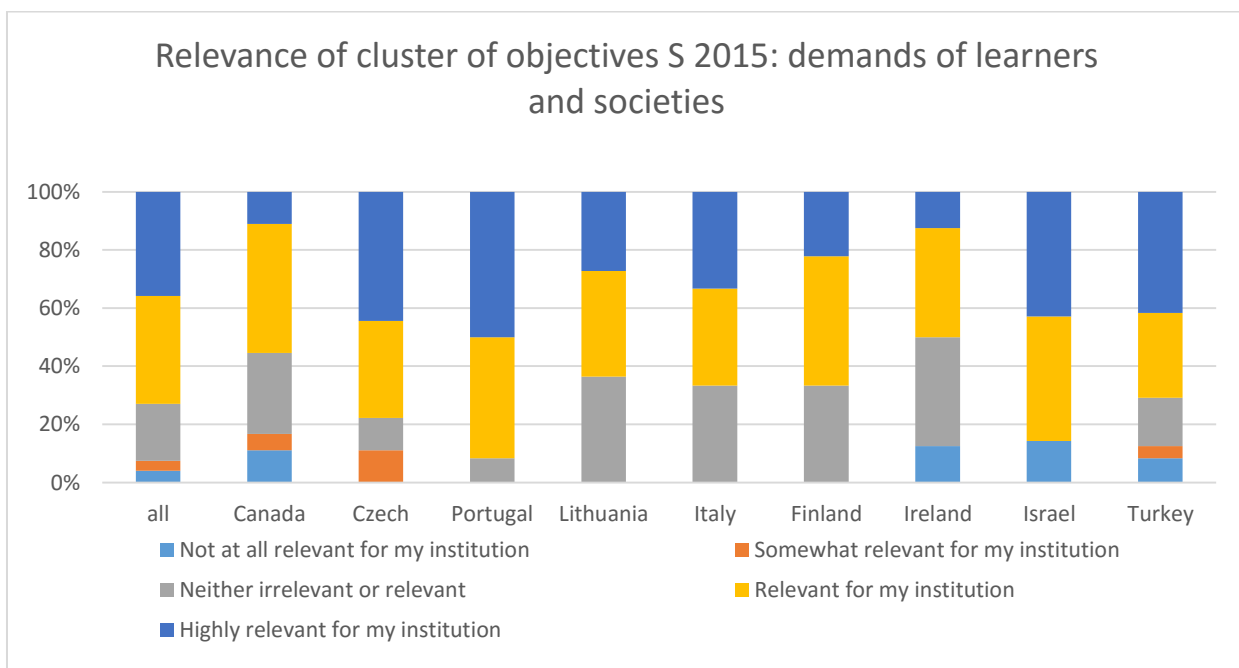
Figure 23 shows that Portugal and Lithuania think that reputation/visibility is the most relevant for their institutions and especially in Ireland a large percentage finds this less important.





**Figure 24:** Relevance of innovation area for nine countries compared with all (S2015).

In Czech Republic and In Italy the respondents think that ‘Innovation Area’ is (highly) relevant for their institutions while the respondents of Ireland think this is less relevant.



**Figure 25:** Relevance of demands of learners and societies for nine countries compared with all (S2015).

Figure 25 shows that both Portugal and Israel think the demands of learners and societies are (highly) relevant for their institutions. In Canada relatively more respondents think this is less relevant.

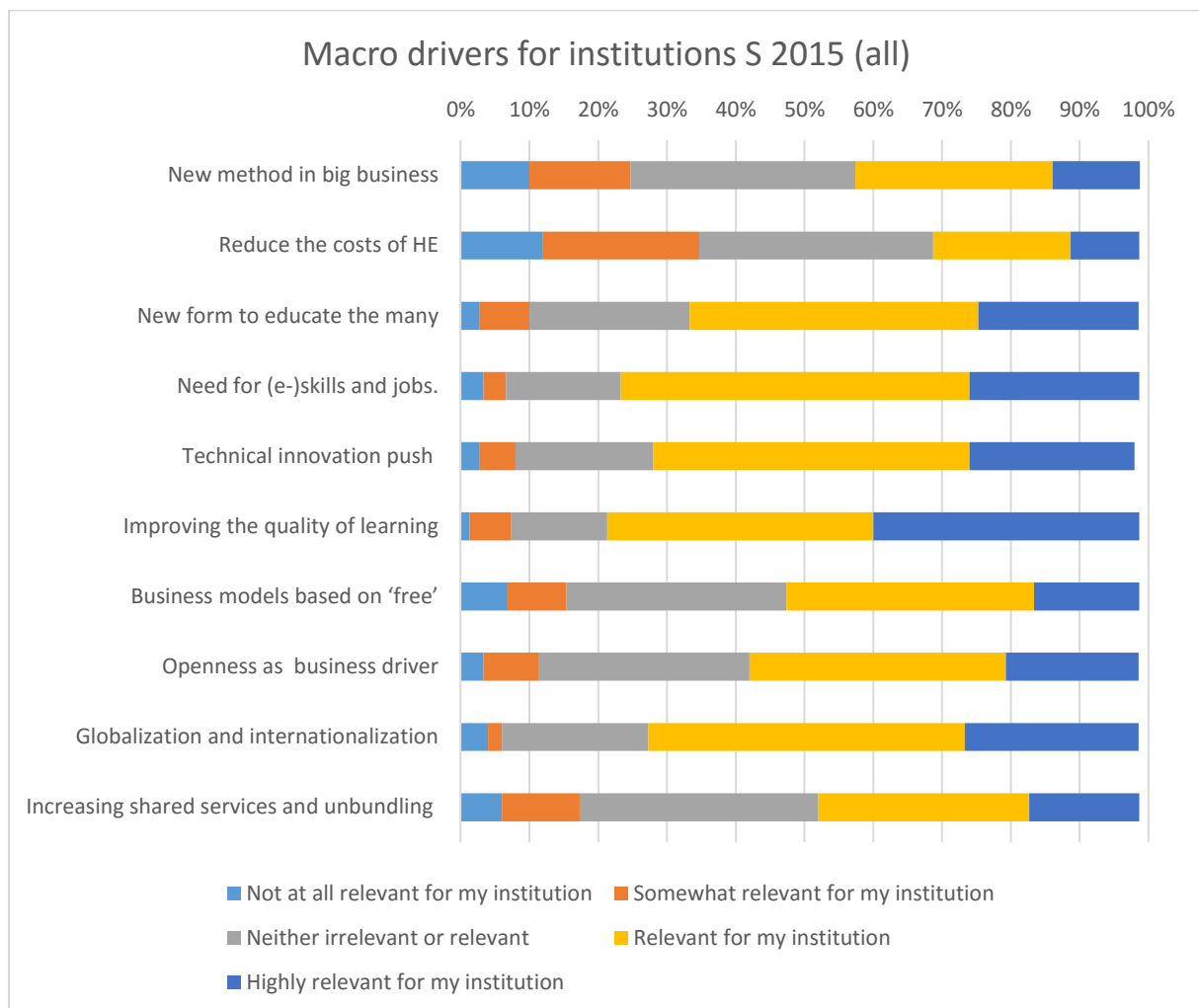
## Macro drivers behind MOOC offering

The European report “ Institutional MOOC strategies in Europe, Status report based on a mapping survey conducted in October - December 2014” (Jansen & Schuwer, 2015) extensively discusses the macro drivers behind the MOOC movement.

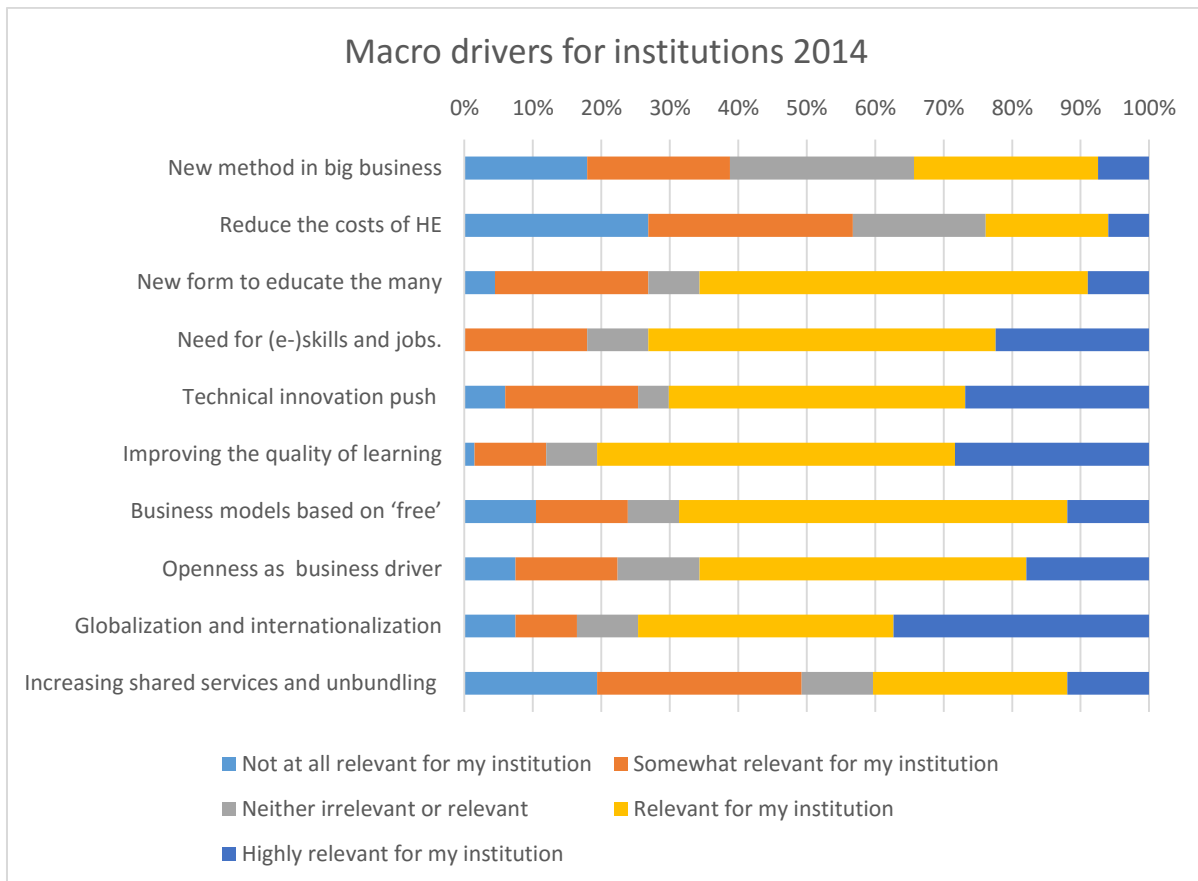
### The importance of different macro drivers for institutional MOOC offering

Figure 26 shows the response from the 150 institutions in the 2015 survey concerning the relevance of ten different macro drivers for MOOCs. Here are some points that stand out from the result.

1. Reduce the costs of HE (driver 2, only 30% consider this (highly) relevant)  
This result is consistent with previous results in this survey (e.g., figure 19 and 22)
2. New method in big business (driver 1, 41,4% considers this (highly) relevant)  
Apparently most European institutions are not in the market with MOOCs to generate big business. This relates to the strong social dimension of higher education where many universities in Europe are funded by Governments.
3. Improving the quality of learning is thought as highest relevant (driver 6, 77,4% considers this (highly) relevant) directly followed by a ‘need for (e-)skills and jobs’ (driver 4, 75,4%).



**Figure 26:** Relevance of 10 different macro drivers for European institutions (S2015)



**Figure 27:** *Relevance of 10 different macro drivers for European institutions (EU2014)*

The results of 2015 confirm the results of the survey of 2014 (Janssen & Schuwer, 2015). We see that both 'Improving the quality of learning' and 'Need for (e-)skills and jobs' are considered the most relevant and reducing 'Reduce the costs of HE' and 'New method in big business' are seen as less relevant.

## Collaboration or Outsourcing of services in MOOC offering

The ongoing evolution of technology also introduces opportunities for opening up education by providing a range of online support services. In the context of MOOCs, with their massive dimension, the important digital innovation is related to the scalability of many educational services. MOOCs are also opening up a discussion around the unbundling of such services.

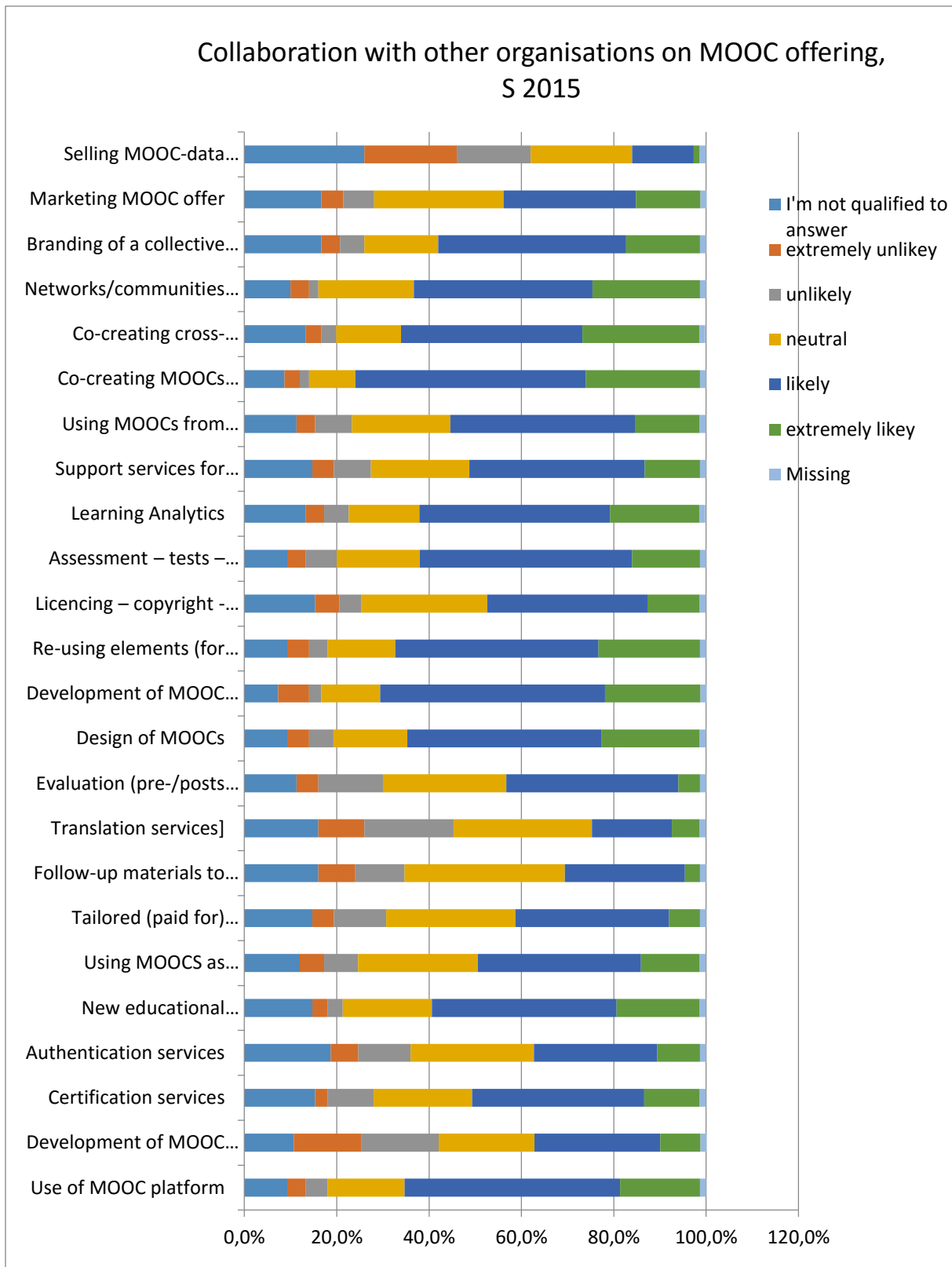
In this section (6) we asked what the primary reasons for your institution are to collaborate with others on MOOCs. In the next section (7) we asked what kind of services institutions would be willing to outsource to (public and/or private) providers. Note that this was a new questions i.e. was not asked in the 2014 survey.

Both questions are supported by a common list of 24 areas:

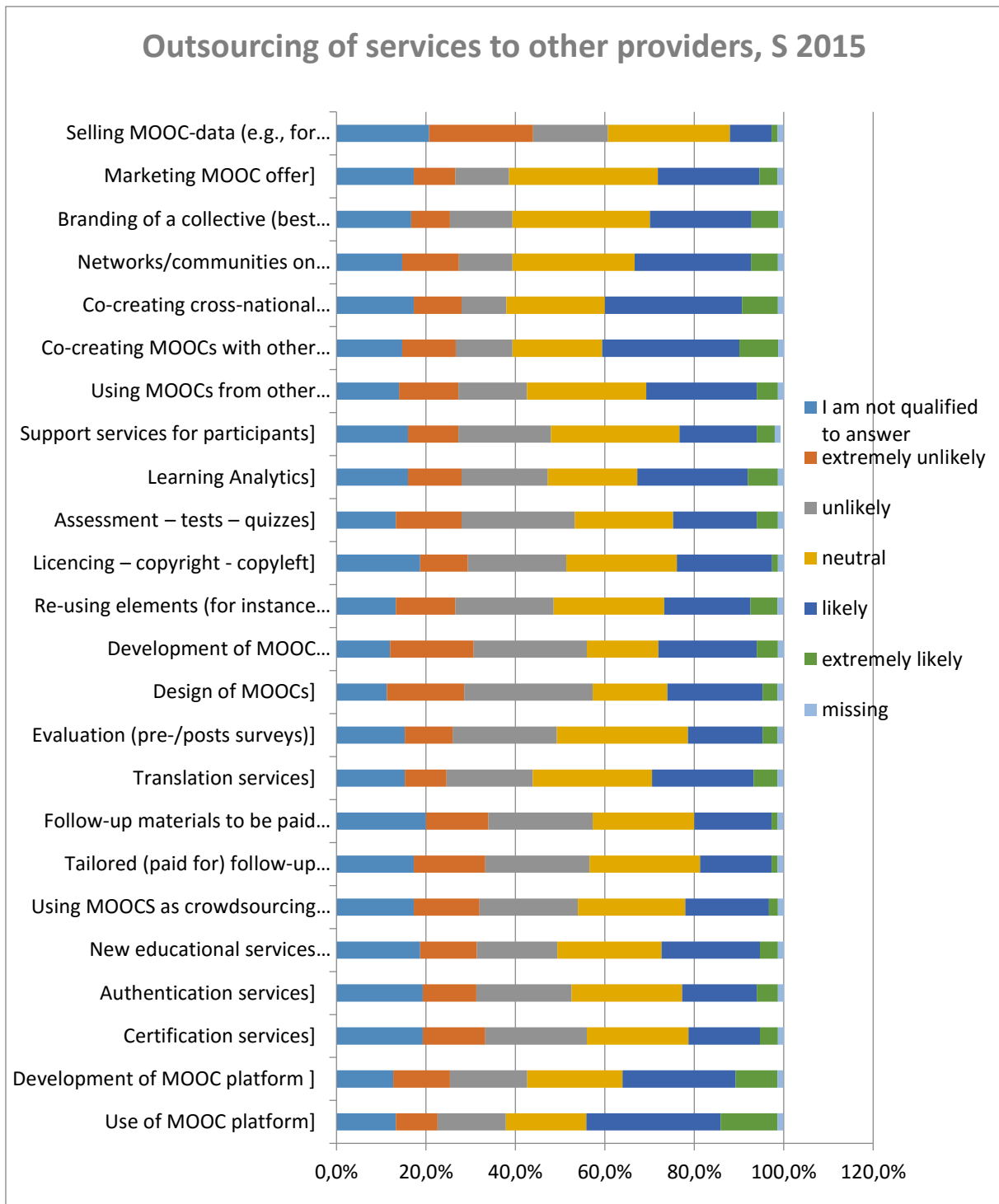
1. Use of MOOC platform
2. Development of MOOC platform
3. Certification services
4. Authentication services
5. New educational services (scalable)
6. Using MOOCs as crowdsourcing to answer research questions
7. Tailored (paid for) follow-up courses
8. Follow-up materials to be paid for (e-documents,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

In addition one could indicate other areas in an open question as well.

Figure 28 presents the preliminary results of the 2015 survey on the likeliness of areas on which institutions would collaborate with other HE institutions. It is general observed that European HEIS are very much willing to collaborate on services like co-creating MOOCs with other institutions, re-using elements from MOOCs, development of MOOC (materials) and in the design of MOOCs next to the use of MOOC platforms. The joint development of a European MOOC platform is not very likely as well as services on selling data, translation services and follow-up materials.



**Figure 28:** Likelihood of areas on which institutions in overall survey (S2015) would collaborate with other HE institutions.



**Figure 29:** Likeliness of services that institutions in overall survey (150 HEIs) (S2015) would outsource to other providers

Figure 29 repeats the same question but now asks about the likeliness of services that institutions would outsource to other providers. In general the likeliness to outsource these services is much lower. Most likely services to be outsourced are related to the use of a MOOC platform and to co-creating MOOCs with other institutions in the context of cross-national educational programmes based on MOOCs with other institutions. Consequently, a corporate academic mix seems less likely

to occur in Europe, and a cross-institutional/regional collaboration, with some government support, seems much more likely. This is subject to another EU-funded project SCORE2020 (2015).

As many European Institution are (going to be) involved in MOOCs, the need for regional / cross-institutional collaboration schemes will increase. Especially as most of these HEIs cannot become partner of the big MOOC providers as they apply a selective contracting policies to HEIs. However, the regional differences in languages, cultures and pedagogical approaches might hinder an effective collaboration on scalable services in MOOC provision. In at least the European context the responsibility to stimulate the uptake of MOOCs should be shared between governmental agencies, academic and non-academic institutions, employers, and other stakeholders. Governments should support and scale up multi-stakeholder partnerships for efficiency reasons but also for the benefit of society as a whole. The recent UNESCO-COL publication (2016) is in this respect a call to re-vitalise the role MOOCs play in different society goals.

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

## Perceptions on what’s a MOOC

Jansen & Schuwer (2015) extensively discusses the several dimension involved in MOOCs, and validates the following definition of MOOCs:

MOOCs are “**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).

The report also discusses the possible criteria related to each letter of MOOC. In this report we discuss the differences between all the European institutions and the institutions that are offering MOOCs (questions from section 9 in the questionnaire).

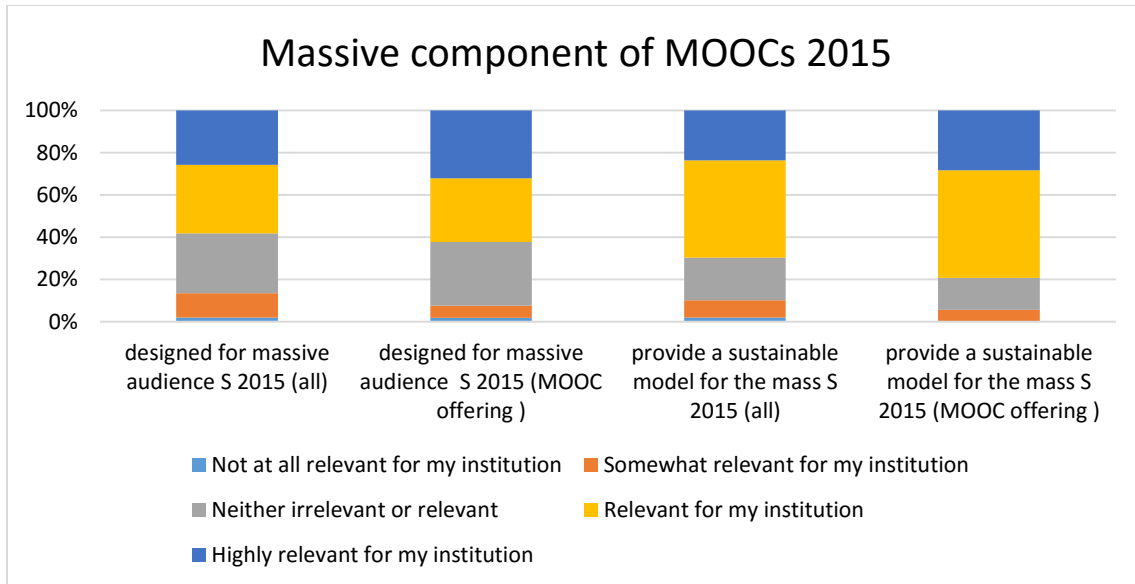
## The importance of the massive dimension in MOOCs

A MOOC differs to other Open Online Courses by the number of participants. To determine the importance of the massive dimension we included two questions in the survey.

*How important are the following dimensions of a MOOC for the learners/participants?*

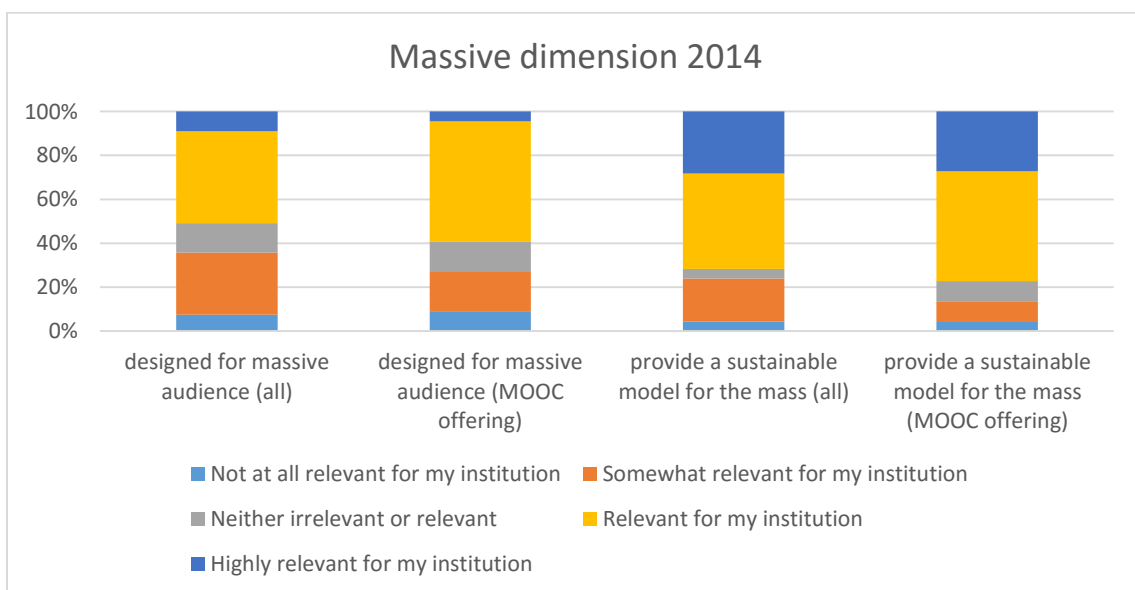
- MOOCs must be designed for massive audience
- In addition MOOCs should provide a sustainable model for the mass  
E.g. leverage massive participation or the (pedagogical model of the) course is such that the efforts of all services (including of academic staff) does not increase significantly as the number of participants increases.

Figure 30 shows the response of all the institutions on the massive dimension compared to the institutions that are offering MOOCs. The MOOC offering institutions are slightly more positive on the design for a massive audience and think almost equal about the provision of a sustainable model for the mass. 68,6% of respondents state that it is (highly )relevant that “MOOCs should provide a sustainable model for the mass”. In addition 57,3% finds it (highly )relevant for their institution that “MOOCs must be designed for massive audience”.



**Figure 30:** Importance of the massive dimension of MOOCs overall survey (2015) all and MOOC offering

In figure 31 we see the same comparison for the 2014 survey. This figure shows that in 2014 institutions already offering a MOOC are slightly more positive on both aspects of massive. Compared to 2015 a larger percentage agreed that MOOCs must be designed for massive audience, strengthen this must be a criterion in the MOOC definition as proposed.

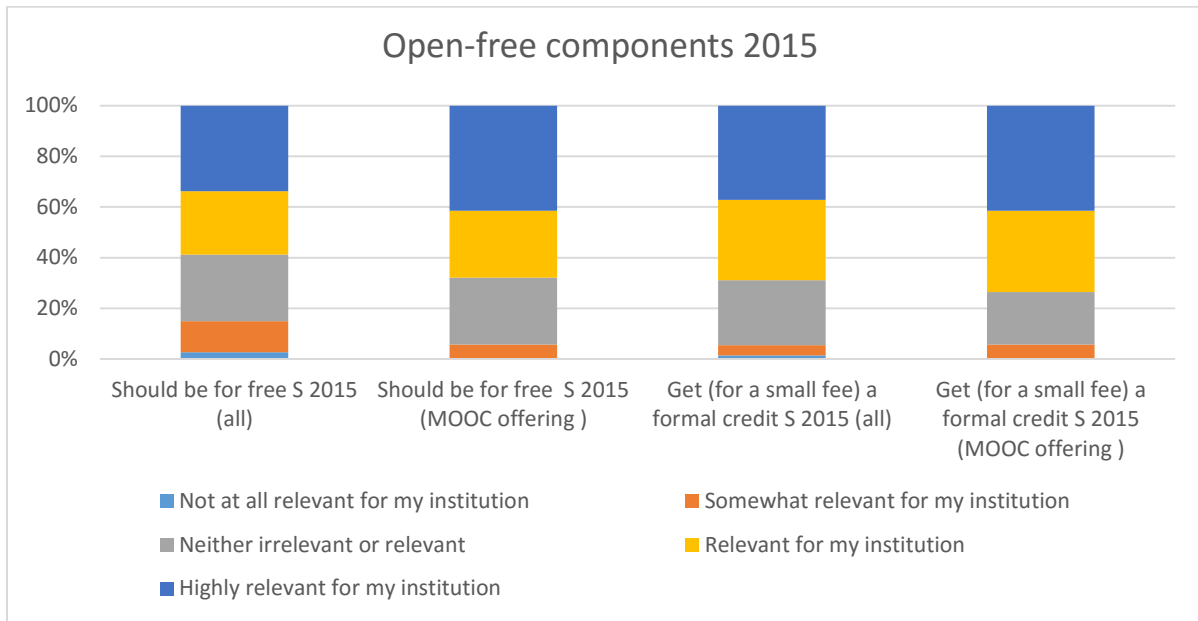


**Figure 31:** Importance of the massive dimension of MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)

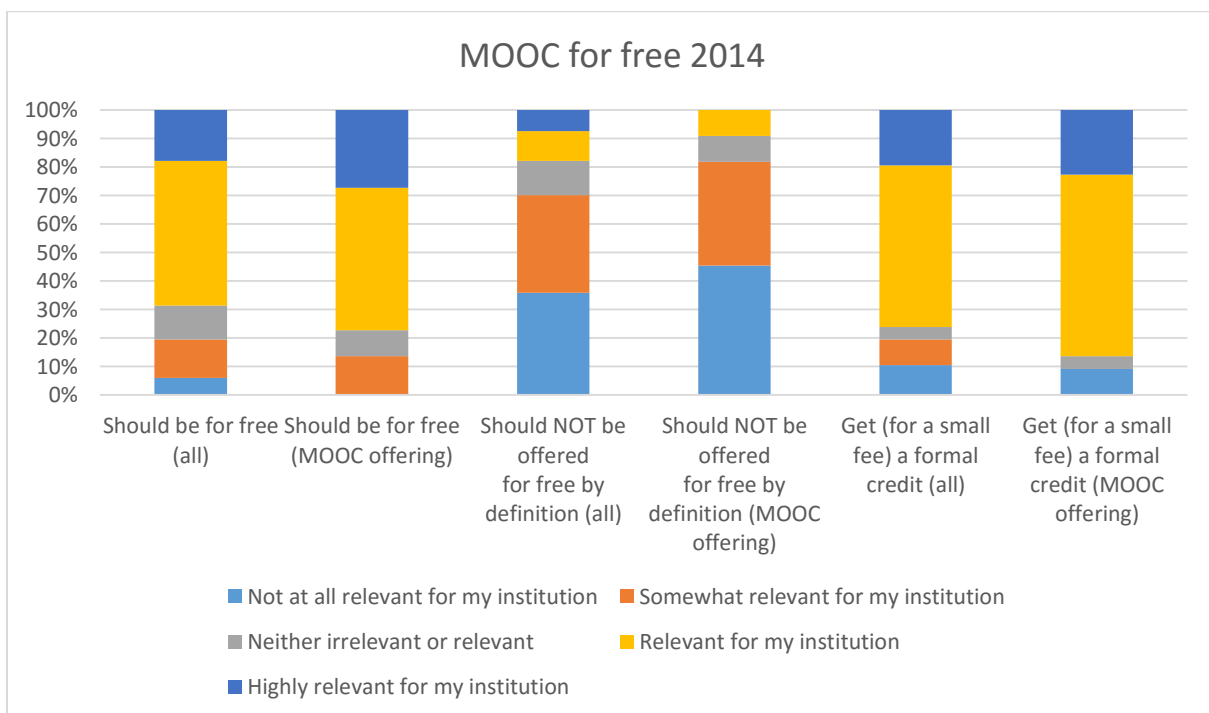


### The importance of the open dimension in MOOCs

In this section we discuss the open dimension in MOOCs. We asked about the importance of the free delivery in the open dimension of MOOCs and about other “openness” in MOOCs for all compared with MOOC offering institutions (figure 32 for 2015 and figure 33 for 2014). The option ‘Should NOT be offered for free by definition’ is not included in the 2015 survey.



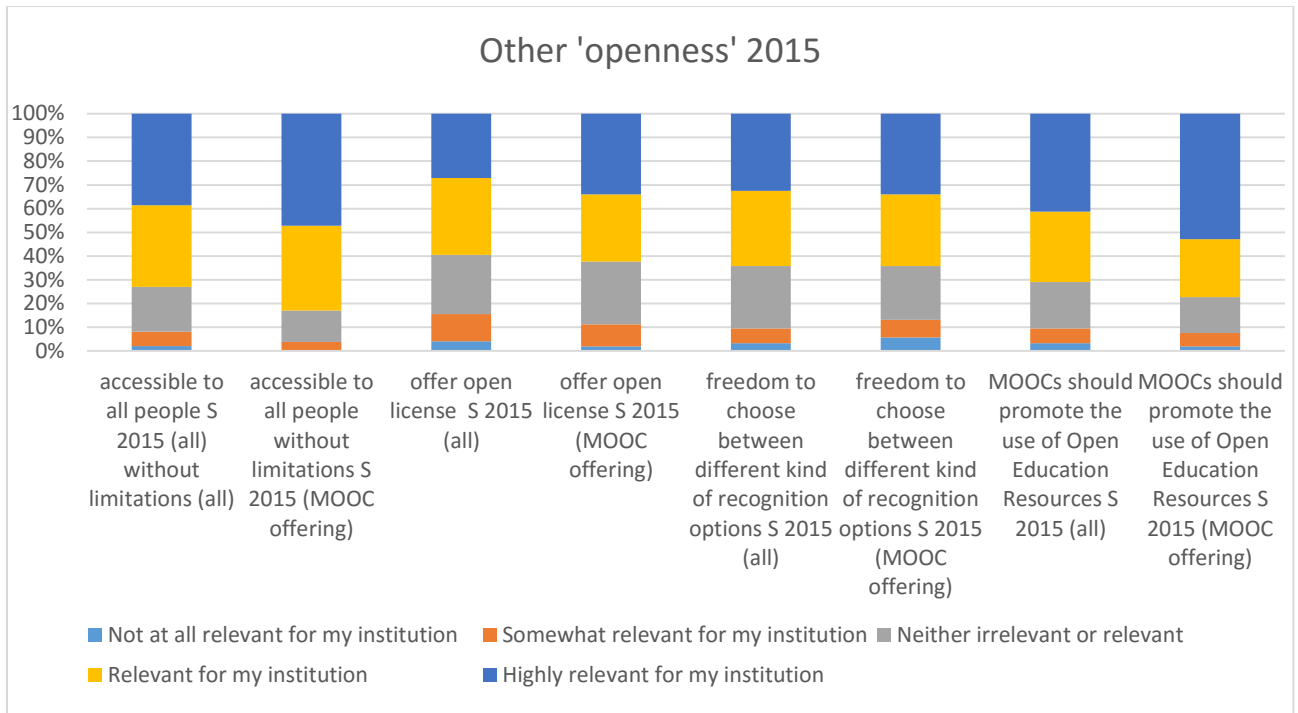
**Figure 32:** Importance of the free/gratis in the open dimension of MOOCs compared between all and MOOC offering institutions in S2015



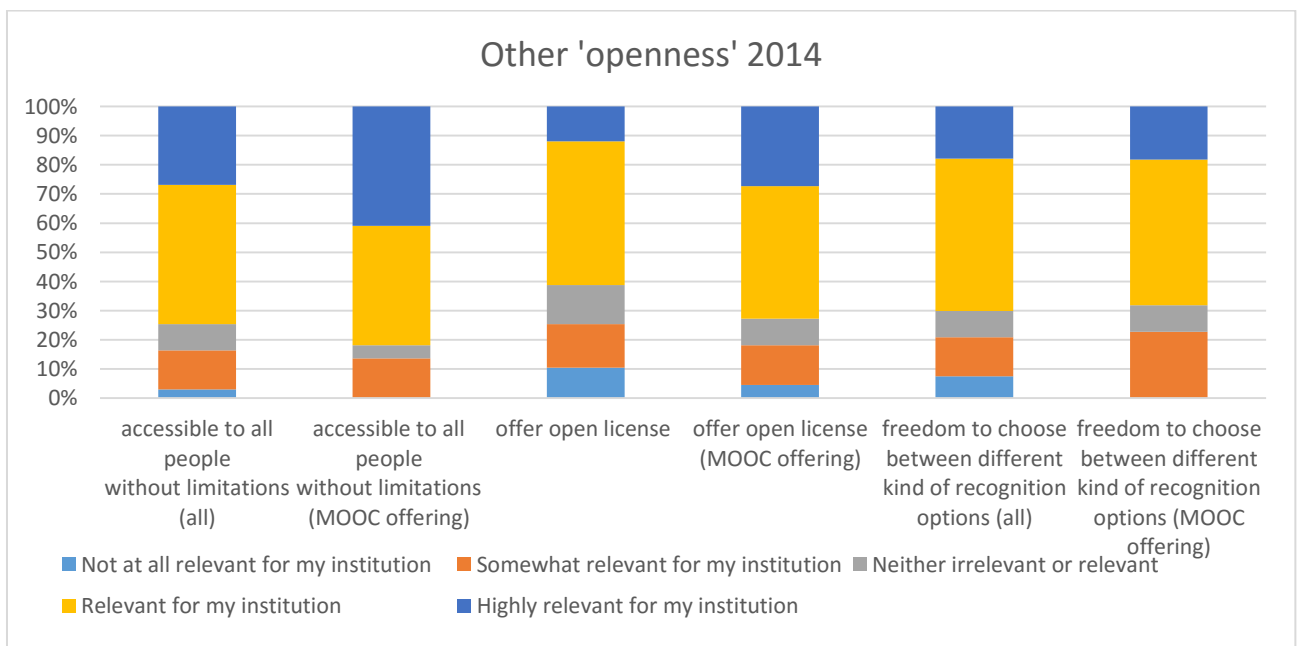
**Figure 33:** Importance of the free/gratis in the open dimension of MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)

These figures show that the free dimension of MOOCs is very important for the MOOC offering institutions and important for all but in 2015 this is more important than in 2014. 68,6% finds that MOOCs should be for free as (highly) relevant. Getting a formal credit is considered more important and (highly) relevant for the institutions that offer MOOCs than overall in both years.

About other aspects of openness the importance is shown in figure 34 and 35. The question about the promotion of the use of Open Education Resources is added in 2015.



**Figure 34:** Importance of open dimensions of MOOCs compared between all and MOOC offering (S2015)



**Figure 34:** Importance of open dimensions of MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)

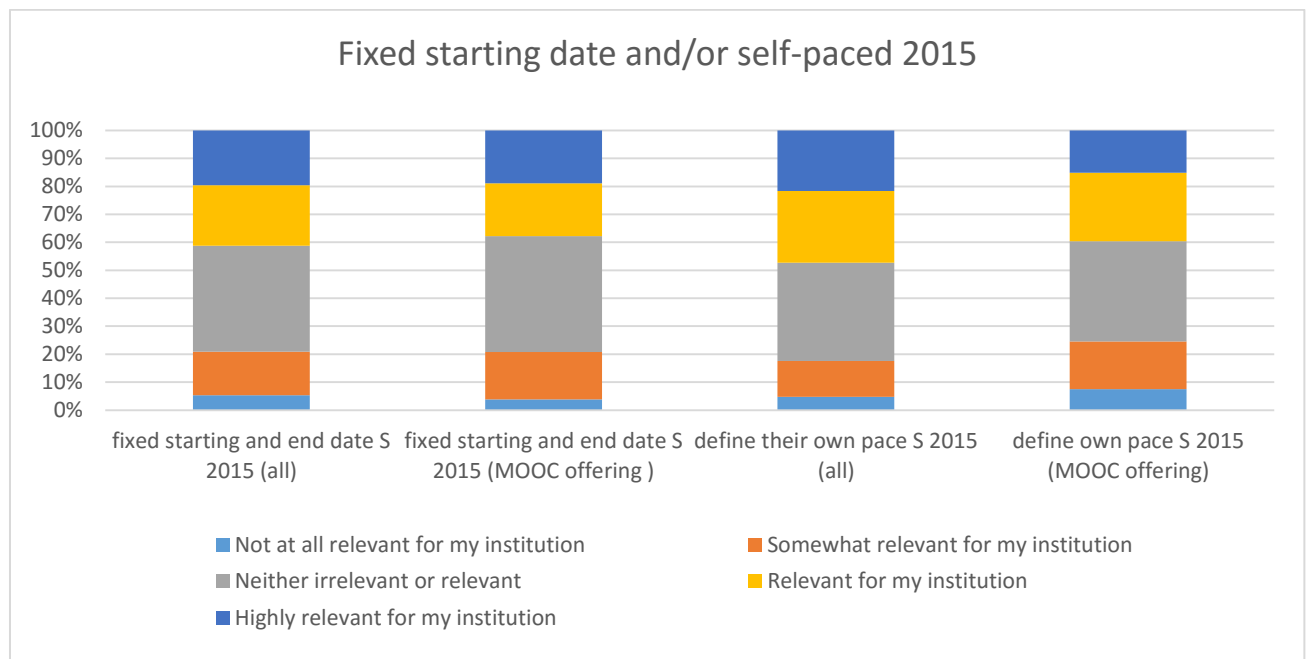
From the results we see that in institutions with MOOCs the open dimensions are considered as more relevant or highly relevant than in the overall institution in both years. But the difference is relatively small. In both years the respondents think that the option ‘MOOCs should be accessible to all people without limitations’ is relevant to highly relevant. The options ‘offer open license’ and ‘freedom to choose between different kind of recognition options’ they think are relevant. In 2015 the MOOC offering group finds ‘MOOCs should promote the use of Open Education Resources’ more relevant than the overall group (S2015): 70% finds it (highly) relevant that MOOCs should promote the use of OER.

### Fixed start date and/or self-paced courses

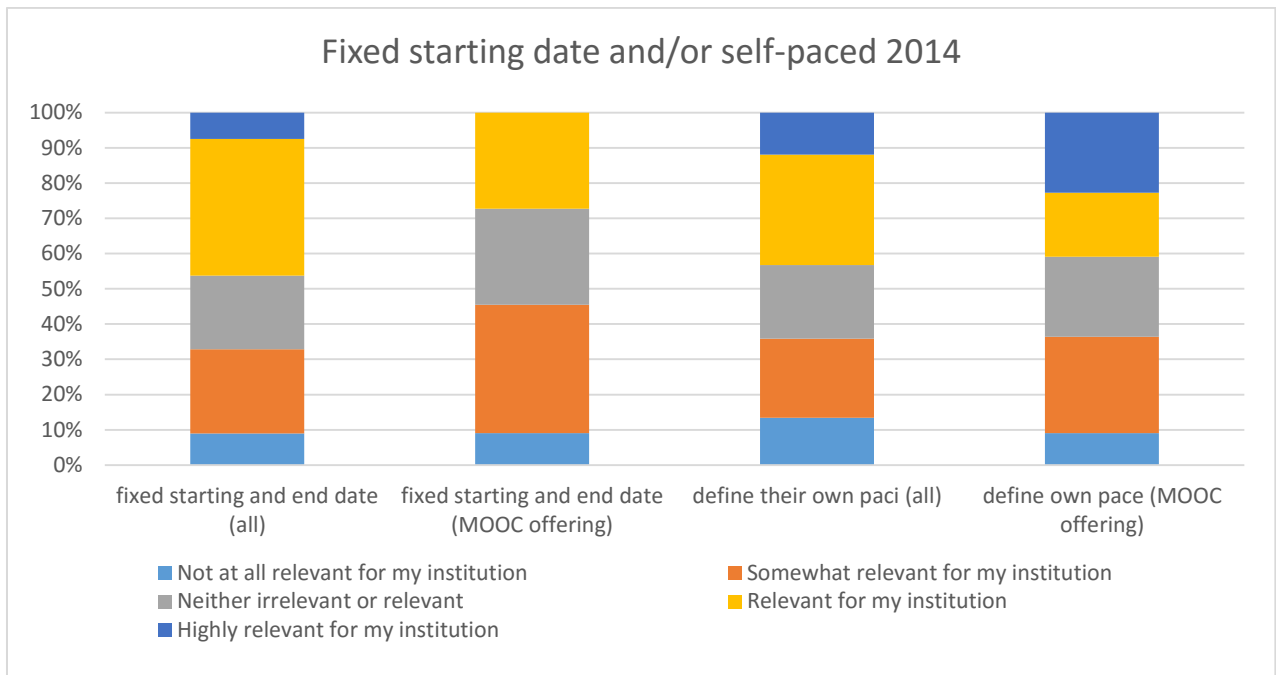
Regarding the issue of freedom of place, pace and time of study (as part of the open dimension), we included the following two questions.

*How important are the following dimensions of a MOOC for the learners/participants?*

- MOOCs should have a fixed start and end date with imposed pace for every participants
- MOOC participants should also have the freedom to define their own pacing and finish whenever they want.



**Figure 36:** Importance of courses with fixed starting date and of self-paced courses of MOOCs compared between all and MOOC offering (S2015)



**Figure 37:** *Importance of courses with fixed starting date and of self-paced courses of MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)*

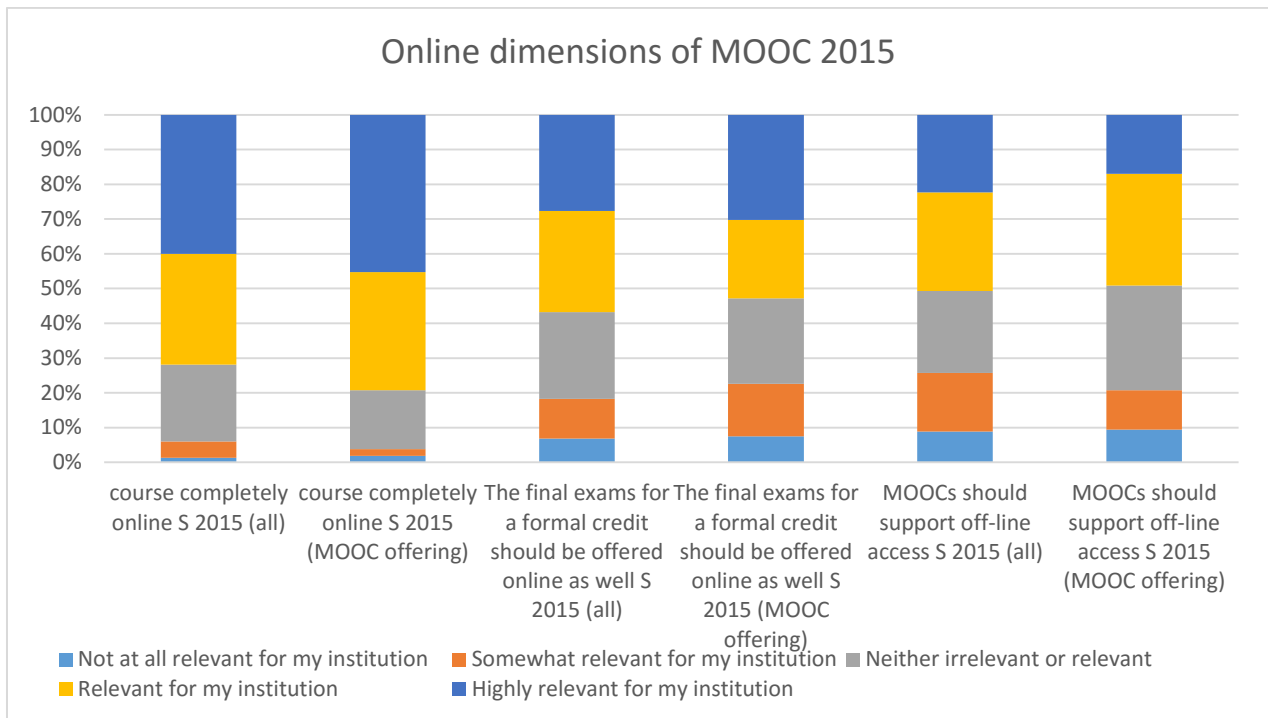
In these figures we see that all institutions as well as MOOC offering institutions are positive/neutral about fixed dates and that they agree that participants of a MOOC should have the freedom to define their own pacing and finish whenever they want. On the last question the MOOC offering institutions are less positive than overall. We also see that in 2015 the institutions become more positive about this dimension than in 2014.

### The importance of the online dimension in MOOCs

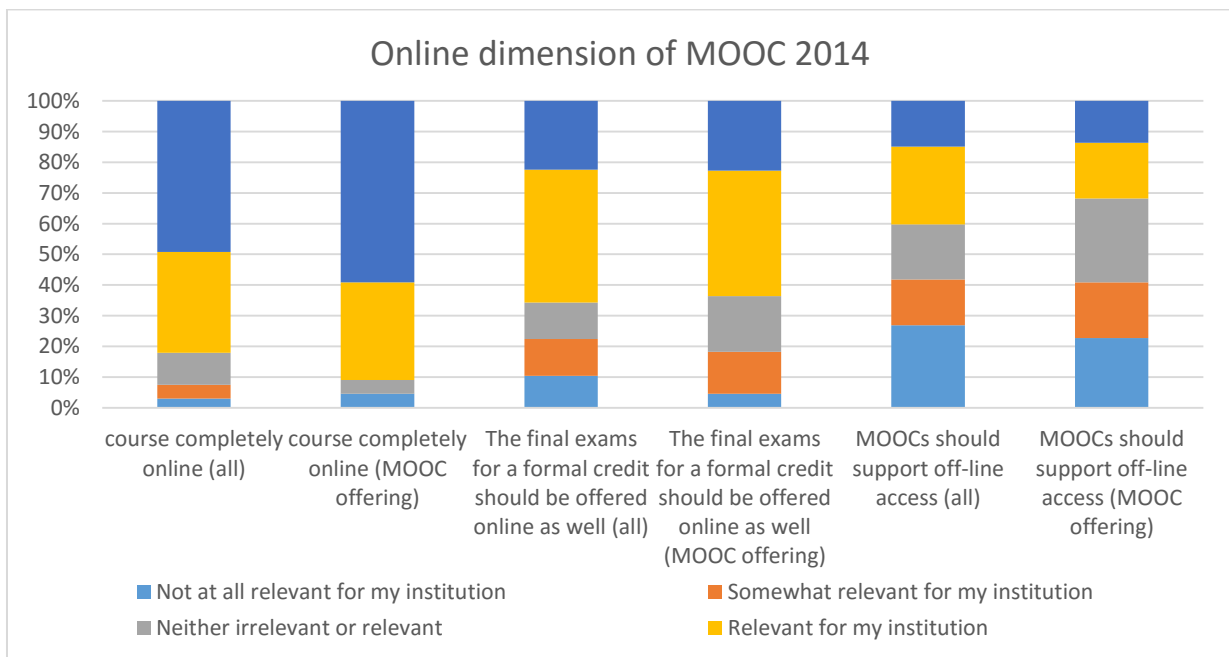
For the online dimension we included the following three questions.

*How important are the following dimensions of a MOOC for the learners/participants?*

- MOOCs should offer the course completely online
- The final exams of a MOOC for a formal credit should be offered online as well (with respect to quality procedures, authentication, etc.)
- MOOCs should support off-line access for those with weak network connectivity



**Figure 38:** Importance of the online dimension in MOOCs compared between all and MOOC offering (S2015)



**Figure 39:** Importance of the online dimension in MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)

Figure 38 and 39 show the results of these three questions related to the online dimension of MOOCs. Both all and MOOC offering in 2015 and 2014 are positive and highly positive about the importance of offering the course completely online. In totally in 2015 all is somewhat more positive about the importance of offering the final exams online and in 2014 both groups are almost equal positive about this aspect. In 2015 both groups are positive about the relevance of supporting off-line

access for those with weak network connectivity and in 2014 all are more positive about this aspect than the MOOC offering group.

### The importance of the course dimension in MOOCs

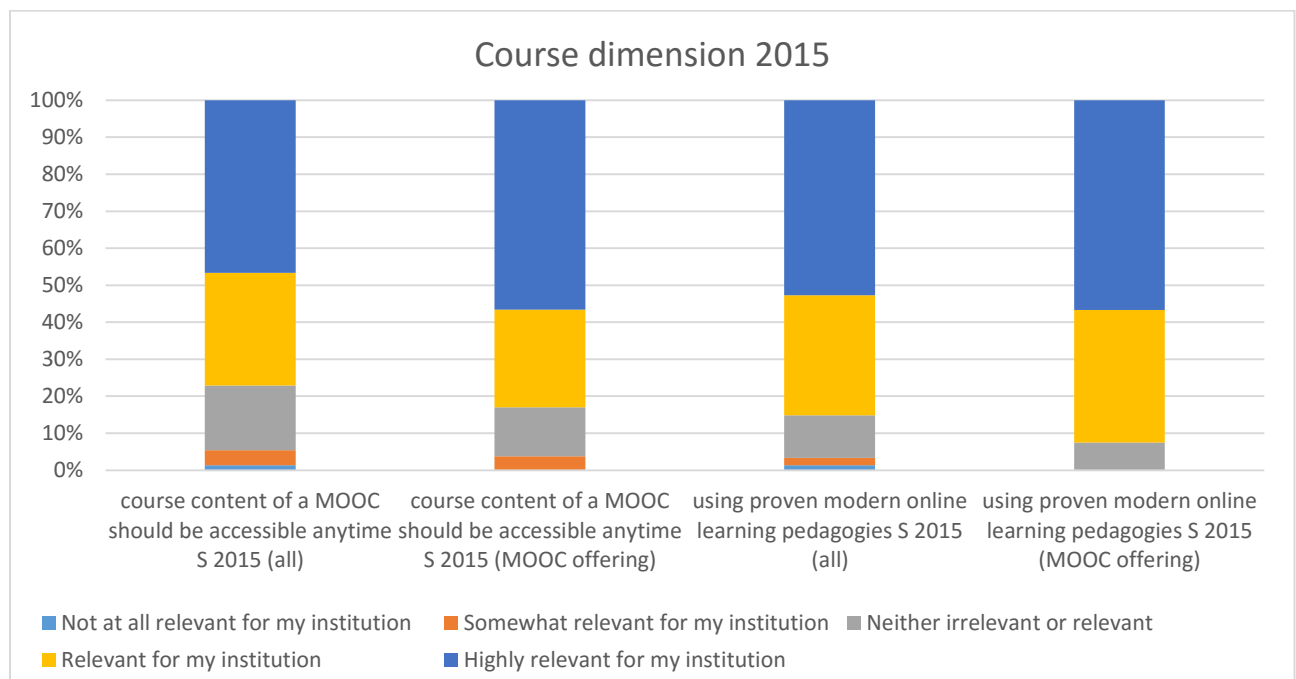
The last letter in MOOCs refers to the course level. A formal definition, as proposed (OpenupEd, 2014), is that a MOOC should offer a full course experience. I.e. the total study time of a MOOC should be minimal 1 ECTS and should include

- educational content
- facilitation interaction among peers (including some but limited interaction with academic staff)
- activities/tasks, tests, including feedback
- some kind of (non-formal) recognition options
- a study guide / syllabus

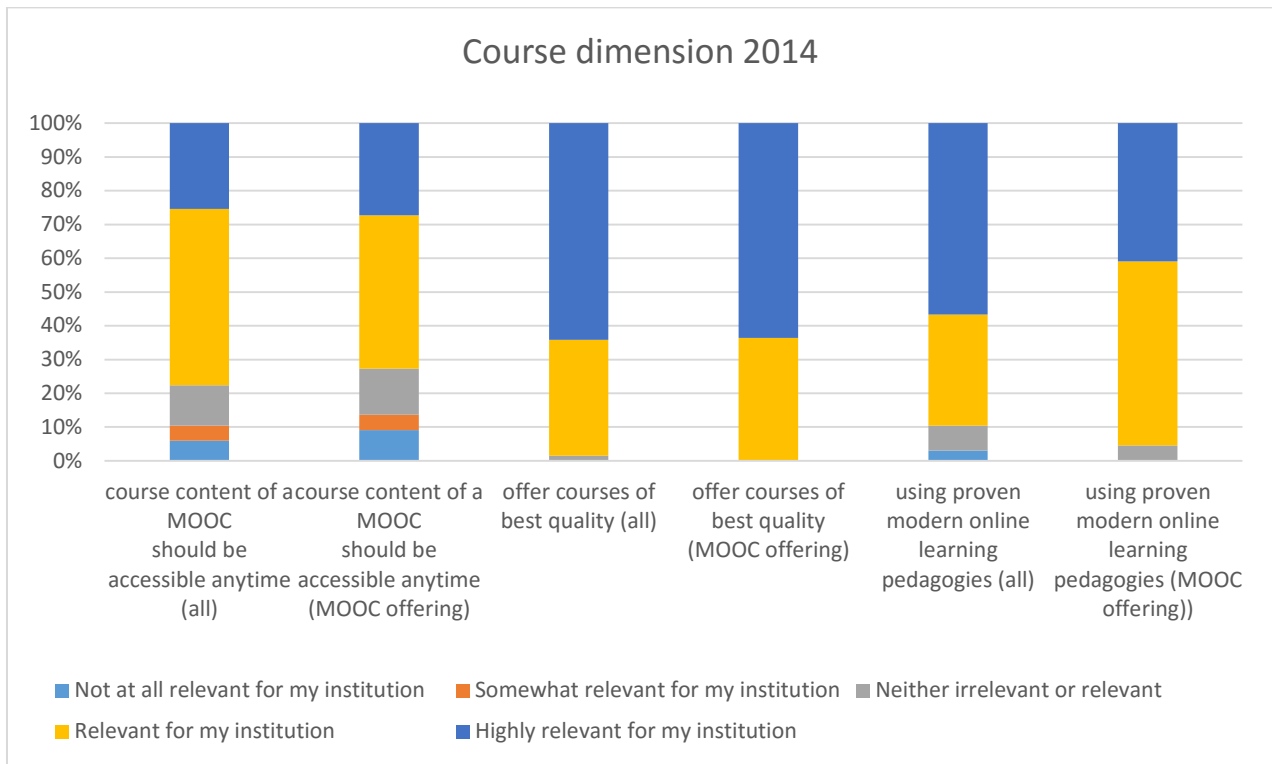
However, the course dimension of MOOCs is also debatable. Some people argue that MOOCs should not be compared to formal courses as they are part of non-formal education. To further test this the European survey (Janssen & Schuwer, 2015) included questions that are related to quality and pedagogies. This year we repeat these following three questions.

*How important are the following dimensions of a MOOC for the learners/participants?*

- At least the course content of a MOOC should be accessible anytime (i.e. not only between start and end date for a scheduled course)
- MOOCs should offer courses of best quality. And as such be part of quality assurance of the institution (not in 2015)
- MOOCs should be using proven modern online learning pedagogies



**Figure 40:** Importance of the course dimension in MOOCs compared between the EU 2014, overall survey (2015) and institutions of COUNTRY...(2015)



**Figure 41:** Importance of the course dimension in MOOCs. Next to all respondents, also a sub-selection of those institutions that offer a MOOC is shown (MOOC offering)

These figures show that in 2015 the MOOC offering institutions find the accessibility of the content more relevant for their institutions than overall. In 2014 both the groups think almost equal about this topic. About the use of proven modern online learning pedagogies in 2015 the groups 'offering MOOCs' is more positive than all and in 2014 they both find this relevant or highly relevant.

## Closing Remarks

It can be concluded that several, independent studies, confirm earlier results that the uptake of MOOCs in Europe differs from at least the U.S. The HOME project by two successive surveys and its activities contributed to the identification of the European model. There is a strong awareness of the unique European position of MOOC development and offering. The next big step is the orchestration of a collective – collaborative response. This, in European context with a mature serious uptake, needs shared responsibility between various stakeholders especially as the MOOC uptake in (continental) Europe seems largely framed from a policy perspective as a public good.

As many European Institution are (going to be) involved in MOOCs, the need for regional / cross-institutional collaboration schemes will increase. Especially as most of these HEIs cannot become partner of the big MOOC providers as they apply selective contracting policies to HEIs. As such, different stakeholders in Europe now call for different regional strategies to leverage the full potential of online learning and MOOCs for education and development. In general an increasing number of supportive policies to stimulate the uptake of MOOCs at various levels is observed. This includes MOOC policies by IGOs (e.g. UNESCO, OECD), by the European Commission (for example through programmes of DG EAC and DG Connect), national governments (e.g., France, the Netherlands, Slovenia) and private companies (like MOOC platform providers). As such, collaboration between European HEIs, governments and civil societies seems to accelerate the development, the delivery as well as the usage of MOOCs.

However, the regional differences in languages, cultures and pedagogical approaches might hinder an effective collaboration on scalable services in MOOC provision. MOOC provision (and collaboration on shared services) should account for diverse languages, cultures, settings, pedagogies and technologies. As such the generic MOOC model needs to be re-engineered to allow for a broad spectrum of approaches and contexts. We are now witnessing a trend towards a demand-led approach, designing MOOCs in response to the requirements of particular groups in society who need to have more knowledge on a specific topic. Bringing social approaches and thinking to these design processes is essential to realise the real value of MOOCs.

In at least the European context the responsibility to stimulate the uptake of MOOCs must be shared between government agencies, academic and non-academic institutions, employers, and other concerned stakeholders. Co-operation should include diverse stakeholders involved, but present case studies show little involvement of all actors. Governments should support this kind of collaboration for efficiency reasons but also for the benefit of society as a whole. Policy and decision makers of all stakeholders involved need to be in a better position to understand the “MOOC phenomenon,” capitalise on the advantages of these large-scale courses and use them as a strategic opportunity to help 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. The recent UNESCO-COL publication(2016) is in this respect a call to re-vitalise the role MOOCs play in different society goals.



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## Annex 1: Survey used

# Comparing Institutional MOOC Strategies

Survey opened at 15 October 2015 and closed on 4 January 2016 | check [home.eadtu.eu](http://home.eadtu.eu)



## Introduction

This survey focuses on strategies of higher education institutions (HEIs) regarding MOOCs ([Massive Open Online Courses](#)). You are asked 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 is not involved in MOOCs.

The survey is largely a repetition of the survey from last year. The main purpose last year was to create a starting point to address the possible differences and similarities between HEIs in U.S. and Europe in their possible goals and the strategic choices behind the development of MOOCs. The report [Institutional MOOC strategies in Europe](#) was published in February 2015. A scientific paper about these 2014 results will be published soon in IRRODL.

This year's survey will continue to compare MOOC adoption strategies in Europe. Next to the comparison between Europe and the U.S. we will produce country reports if responses from individual countries is high enough. For this reason this survey is available in [French](#) and [Turkish](#) as well.

This survey is part of the [HOME project](#), co-funded by LLP of the European Commission. Closing date is extended to 3 January 2016. First results of this survey will be presented at the MOOC Conference organised by the HOME project in Rome, 30 November 2015. See: <http://bit.ly/1NmFLHH> for more information. This survey will close at 24 November 2015. First results of this survey will be presented at the MOOC Conference organised by the HOME project in Rome, 1 December 2015.

This questionnaire has eight sections and will take about 20 minutes to complete. Some questions are identical to the U.S. surveys by Allen and Seaman conducted in [2013](#) and/or [2014](#).

## Profile Information

**Full name of Institution**

**Country of institution \***

**Type of institution (Finance) \***

- Mainly public financed
- Mainly private 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 )

### What do you consider to be the main target group for MOOCs? (more than one option possible)

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

### What do you believe to be the most sustainable model for delivering MOOCs at your institution?

*(or if you plan to deliver MOOCs)*

- Primarily based on discussions, collaboration and independent work of students
- Primarily based on teacher instruction, resources/videos and assignments
- Other:

**At what levels of the Institution do you feel MOOCS have (had) an impact?**  
*(or will have if you are planning to offer a MOOC in the near future)*

	No impact	Little impact	High impact
Staff   Academic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff   Administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff   Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff   Technical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff   Support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Students   On-campus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Students   Online/Distance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Students   Full-time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Students   Part-time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School/Department	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Faculty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Central Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Overall Institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Other (please specify)**

## Do you agree with the following statements?

### MOOCs are a sustainable method for offering courses

- Agree
- Neutral
- Disagree

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

- Agree
- Neutral
- Disagree

### 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

- Agree
- Neutral
- Disagree

## Primary objective for your institution's MOOCs

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

- 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.*



## 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

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

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

Highly relevant for my institution

### Responding to the demands of learners and societies

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

### Please add other important objectives for your institution's MOOCs

(or if you plan to offer one)

## Collaboration with other organisations on your MOOC offering

What are the primary reasons for your institution to collaborate with others on MOOCs?  
(others like private companies, associations, other HEIs, NGOs, etc.)

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?

You may add new areas into the provided empty field.

	I am not qualified to answer	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Use of MOOC platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of MOOC platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Certification services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Authentication services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New educational services (scalable)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using MOOCs as crowdsourcing to answer research questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tailored (paid for) follow-up courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Follow-up materials to be paid for (e-documents, software, e- books)	<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"/>
Evaluation (pre-/posts surveys)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design of MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of MOOC (materials)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Re-using elements (for instance OER, tests) from MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Licencing – copyright - copyleft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment – tests – quizzes	<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"/>
Support services for participants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	I am not qualified to answer	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Using MOOCs from other institutions in your own institution	<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"/>
Co-creating cross-national educational programmes based on MOOCs with other institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networks/communities on MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branding of a collective (best research universities, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing MOOC offer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selling MOOC-data (e.g., for recruitment, advertisements)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Other areas for collaboration (please indicate)**

Please do not forget to indicate how likely your institution would collaborate with others after typing new areas for collaboration into the empty field.

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

Below is a list of services your institution may choose to **OUTSOURCE** to (public/private) providers. How likely would your institution **OUTSOURCE** these areas?

*You may add new areas into the provided empty field.*

	I am not qualified to answer	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Use of MOOC platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of MOOC platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Certification services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Authentication services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New educational services (scalable)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using MOOCs as crowdsourcing to answer research questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tailored (paid for) follow-up courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Follow-up materials to be paid for (e-documents, software, e- books)	<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"/>
Evaluation (pre-/posts surveys)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design of MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of MOOC (materials)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Re-using elements (for instance OER, tests) from MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Licencing – copyright - copyleft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment – tests – quizzes	<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"/>
Support services for participants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using MOOCs from other institutions in your own institution	<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"/>
Co-creating cross-national educational programmes based on MOOCs with other institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networks/communities on MOOCs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branding of a collective (best research universities, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing MOOC offer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I am not  
qualified  
to  
answer

Extremely  
unlikely

Unlikely

Neutral

Likely

Extremely  
likely

Selling MOOC-data (e.g., for  
recruitment, advertisements)

**Other areas for outsourcing (please indicate)**

Please do not forget to indicate how likely your institution would outsource after typing new areas for collaboration into the empty field.

## How important are the following macro-drivers for your institutional MOOC offerings?

(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

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

Highly relevant for my institution

**MOOCs are a new form to educate the masses**

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

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**Need 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

Highly relevant for my institution

**MOOCs are essential for the continuous technical innovation push**

*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 freemium business model, free as a tool to promote reputation, free product creates 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 business driver**

*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

**Globalization and increasing collaboration between institutions on MOOCs**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**Increasing shared services and unbundling of education**

*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 marketing, branding, ict-platfom, exams, learning analytics services, etc.*

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

## How important are the following dimensions of a MOOC?

In this part we asked you about the relative importance of each (possible) MOOC dimensions indicated by its acronym, M-O-O-C.

### MOOCs must be designed for massive audience

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

### In addition MOOCs should provide a sustainable model for the mass

*For instance, leverage massive participation or a pedagogical model such that human efforts in all services does not increase significantly as the number of participants increases.*

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

### Anybody can enter the course, i.e. course is accessible to all people without limitations.

*This does not necessarily imply that the course can be taken without any learned competencies or experience.*

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

### MOOCs should offer open licensing such that providers and participants can retain – reuse – remix – rework – redistribute material of the MOOC

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

### MOOCs should promote the use of Open Education Resources (e.g., open-textbooks, Open Courseware, copyleft or public domain materials, etc.)

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution



**A MOOC should be for free, i.e. without any costs for participants**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**In addition MOOCs should offer the opportunity for participants to get (for a small fee) a formal credit as a component of an accredited curriculum**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**Participants of a MOOC should have the freedom to choose different recognition options**

*MOOC participants can choose between badges earned for completion of specific activities, a credential for completion of the majority of activities and a final online test, and full certification with ECTS credit obtained after a proctored test.*

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**MOOCs should offer courses completely online**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**The final exams of a MOOC for formal credit should be offered online as well (with respect to quality procedures, authentication, etc.)**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**MOOCs should support off-line access for those with weak network connectivity**

1 2 3 4 5

Not at all relevant for my institution

Highly relevant for my institution

**MOOCs should have fixed starting and end dates with imposed pace for every participant**

	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

**At least the course content of a MOOC should be accessible anytime**  
*I.e. not only between start and end date for a scheduled course*

	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

**MOOC participants should also have the freedom to define their own pacing and finish whenever they want**

	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

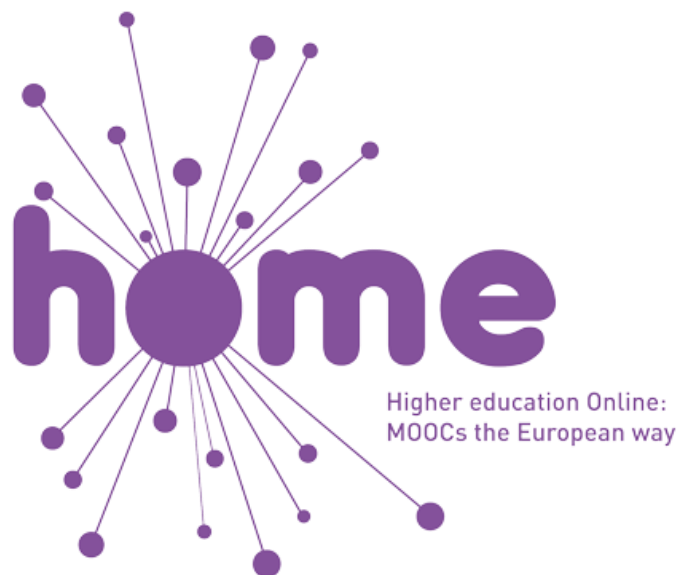
**MOOCs should be using proven modern online learning pedagogies**

	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

## Confirmation Page

Thank you for your time! If you provided us with your email address, we will send you the final report in due time.

James Little, University of Sheffield is also conducting a MOOC survey around the drivers, implementation and impacts of MOOCs. Your contribution to this survey would be very appreciated. The survey is at: <http://www.moocsurvey.org> (Running from 14th October 2015).



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