



THE OBSERVATORY
on Borderless Higher Education

Whatever happened to the promises of online learning?

Lessons from Country Case Studies

Preview of a Forthcoming Observatory Report



INTRODUCTION

The Observatory's remit is a big one- the multitude of transnational higher education models, the plethora of commercial players active in the sector, and the complexities of online learning. This "borderless" higher education is dynamic, exciting and interrelated but can become unwieldy. Moreover, OBHE attempts to cover developments worldwide.

In 2017, we have paid particular attention to online learning and blended learning. We are in the midst of a series of country case studies- twelve of which are already available on our site- which will culminate in a summary report in 2018. This flyer makes the case for this work and offers a preview of some of our findings.

DEFINITION AND METHODOLOGY

Our definition of online learning is broad, encompassing fully online degree programmes as well as blended and hybrid models; and online delivery as a component of conventional campus courses. We are interested in online learning offered by mainstream universities and colleges, but also the activities of other kinds of providers. Online learning is the latest form of distance and open learning, which has a long history in many parts of the world.

In many countries, data about online higher education is patchy, intelligence about activity fragmented, and many trends nascent, but that is precisely why cross-country comparisons and Observatory analysis is needed. Observatory staff and associates sift available government and other data, and scan reports and media coverage.

So far we've published case studies on: China, Egypt, England, India, Malaysia, Mexico, Saudi Arabia, South Korea, Spain, Sub-Saharan Africa, United Arab Emirates, and the United State of America.

A number of other country case studies are still to come.

PREVIEW OF FINDINGS

Twenty years on from the dotcom boom and bust, when online learning went from disruptive darling to over-hyped has-been, what is the sum total of this innovation today? The promise that new technology could dramatically widen access to higher education, enhance the student experience and lower costs was bold but reality proved more complicated.

Among the countries looked at so far, five categories emerge:

- **Distance, Not Online.** Large distance learning sector with little or no use of online learning beyond some MOOC enthusiasm (e.g. Egypt, India)
- **Marginal.** Strong growth in campus enrolment, with some online elements. Most distance learning is blended with in-person study centres (e.g. Saudi Arabia, UAE)
- **Blurred Growth.** A poorly defined combination of informal, distance and online learning enrolment continues to out-perform the overall market (e.g. Mexico, Spain)
- **Clear Growth.** A clear online distance learning sector continues to out-perform the overall market (e.g. United States)
- **Peaked/Decline.** Online enrolment growth has been at the expense of the national distance university. Online enrolment is peaking or is in decline (e.g. England, South Korea)

What is common to all the countries considered so far is that online distance learning has yet to command more than 15% market share, implementation of online elements as part of a face-to-face experience is uneven, multifarious and hard to track within and between institutions, and online learning has little to no association with cost or price reduction. Moreover, outcomes data for online students is rarely reported at institutional or national level, but what data there is tends to position online learning outcomes as below average. The value proposition of online degrees quickly defaults to little more than flexibility and convenience.

But while it is fair to say that the big promises of online learning have generally speaking not come to fruition, the access, quality and cost challenges of higher education globally have not gone away. At this stage in our work, OBHE forecasts three scenarios:

Scenario 1: Online as Supplement.

In this scenario, the future of online learning looks like the past. The technology adds useful functionality but supplements rather than transforms the conventional classroom. A relatively small minority of students study fully online, driven by pragmatism rather than a conviction that the experience is inherently superior.

Scenario 2: Online as Revolution.

(finally). Looking back, the mistake made by early advocates of online learning was timing not substance. First generation online was too limited but the capabilities of today and tomorrow- high performance two-way video, adaptive learning and simulations- transcend the shortcomings of routine in-person learning.

Scenario 3: Online Is Not the Point.

The line between technology and pedagogy is blurred. Delivery mode can be a vehicle for pedagogy and shape it, but it is sound, purposeful pedagogy that fosters learning, not delivery mode alone. Many studies have concluded that a combination of in-person and online learning produces the best results, with pedagogy leading the way.

To gain access to our summary report and more country case studies in 2018, which are exclusive to OBHE subscribers, become a member: www.obhe.ac.uk/how_to_join/subscribe or email info@obhe.org

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