Whatever Happened to the Promise of Online Learning?

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The full report and country case studies are available to OBHE member institutions and organizations. Please visit www.obhe.org.

This article offers a perspective on the evolution, significance, and future of online higher education globally, and is aimed at anyone trying to understand this dynamic and complex field—higher education leaders and practitioners, governments and agencies, and online learning companies. The article draws on a report and a series of national case studies produced by The Observatory on Borderless Higher Education (OBHE) in 2017 and 2018. The stimulus for OBHE's case study series was the tension between the scope, diversity, and relative maturity of online higher education around the world, and the near-absence of studies assessing the significance of online higher education on a global or cross-border level.

The report makes a distinction between five high-level national categories. The first category is **Distance, Not Online**. This category applies to countries with a large distance-learning sector and little or no use of online learning beyond some MOOC enthusiasm (e.g., Egypt, India). **Online Learning as Marginal** is the second category—strong growth in campus enrollment, with some online elements. Most distance learning is blended with in-person study centers, and marginal from a national perspective (e.g., Saudi Arabia, the United Arab Emirates, and sub-Saharan Africa). The third category is **Blurred Growth**. This category is characterized by a poorly defined combination of informal, distance, and online learning enrollment that consistently exceeds the overall market in terms of growth (e.g., Mexico, Spain). The fourth is **Clear Online Growth**—a clear online distance-learning sector continues to outperform the overall market in terms of enrollment (e.g., the United States). Finally, **Peaked/Decline,** where online enrollment has grown at the expense of the national distance university. Online enrollment appears to be peaking or has been relatively flat or uneven in recent years (e.g., England, South Korea).

BRICKS-AND-MORTAR HIGHER EDUCATION HAS KEPT ON GROWING

One way to judge online higher education is in light of overall higher education enrollment and funding trends since 2000. From the beginning, advocates positioned online learning as offering the potential to circumvent conventional institutional access, quality, and cost limitations, suggesting that new technology could accomplish what standard infrastructure could not. Enrollment trends since 2000 tell a different story—according to UNESCO data, the gross enrollment ratio at the undergraduate level doubled in much of the world over the past two decades.

The vast majority of this enrollment expansion had little to do with online learning. Overall enrollment growth dwarfs online student ratios found by OBHE case studies—which are typically well below 10 percent. In countries where online does exhibit enrollment scale, traditional age undergraduates—the vast majority of higher education students—are rarely the target. Brazil, where a number of very

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large for-profit higher education providers have used online learning to rapidly expand enrollment, may be an exception. Despite concerns about the expansion potential of conventional bricks-and-mortar higher education, this model has proven accommodating and popular with students, parents, institutions, and governments.

AT WHAT COST?

Debate continues about the cost efficiency of online learning. Many faculty and administrators regard online learning as more expensive to develop and deliver than conventional arrangements. The what and the how of online learning is more important than the "fact" of the delivery mode. Details of implementation—the host of variables at play—inhibit simple conclusions or generalizable findings. Formal assessment requires quantitative data, but the subjective and relational nature of education calls for qualitative inputs. What can be measured is not necessarily what needs to be.

The bottom line is that online higher education has yet to clearly demonstrate lower development and delivery costs. Put another way, specific forms of online higher education with well-understood cost reduction models and quality safeguards have rarely been scaled up. Few nonprof-

it higher education institutions embark on online learning with cost savings top-of-mind. No question there are financially successful, popular, and quality online programs with respectable outcomes. The point here is that online programs tend to emphasize convenience over cost, and price, conventionally, as a proxy for quality.

WHAT ABOUT CROSS-BORDER ONLINE LEARNING?

Another strand of early enthusiasm for online learning was the notion that the technology would disrupt national higher education systems, prompting large virtual student flows across country borders. Again, reality proved rather different. From a large base, conventional international student flows have increased about threefold since 2000 to almost five million students, while cross-border online learning has remained marginal by comparison.

The OBHE report examines data from Australia, the United Kingdom, and the United States, showing that the fully online or distance share of total international student enrollment—all modalities—is modest and often in decline. Despite the convenience and direct or indirect cost savings that online learning affords, some mix of preference, habit, regulation, and technology limitation continues to render the modality peripheral to international student recruitment.

CONCLUSION

UNESCO forecasts that global demand for higher education will rise from an enrollment of about 200 million today to 414 million by 2030, driven by population growth, a burgeoning middle class in emerging economies, and attainment gains in secondary education. Higher education enrollment more than doubled between 2000 and 2015, leveraging primarily bricks-and-mortar models, and despite earlier predictions that distance learning would need to address a looming capacity gap. But adding another 200 million students may only be practical if online learning plays a more strategic role.

Fixed broadband is reaching a critical mass in much of the world, an essential precondition to online learning taking off. Governments increasingly see online learning as a tool that can be used well or poorly, rather than something to be blindly championed or stereotyped. But it is hard to imagine fully online degrees catering to a large proportion of traditional age undergraduates, the bulk of the higher education market. By itself, the delivery mode is simply too limited pedagogically to engage the typical student throughout a lengthy degree program. Online learning is no match for travel, immersion, and networking, not least for international students. For shorter programs, at least at the graduate level, and for more experienced students who enroll later in life and for whom the convenience of online is es-

sential, fully online can be a good fit if pedagogically sound.

For many institutions and students, a blend of online and in-person study may be the best way forward. Blended learning means that online learning complements, rather than competes with, the traditional campus; supports learners, faculty, and staff where they live (in urban areas at least); and affords creative combinations of individualized and group, and online and in-person learning. This vision of online higher education aligns online and campus development, something that is surely in the long-term interest of most institutions. ∎

Maximizing the Civic Mission of Universities

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Michelle Obama's autobiography, *Becoming* (2018, p.147), talks about growing up on the South Side of Chicago, Illinois (US), and the chasm between the University of Chicago and its neighborhood. She writes, "To most everyone I knew growing up, elite meant *not for us*. Its gray stone buildings almost literally had their backs turned to the streets surrounding the campus… Like many South Siders, my family maintained what was an admittedly dim and limited view of the university, even if my mom had passed a year happily working there."

Michelle's reflections are echoed in a recent United Kingdom survey. According to a 2018 survey by the Civic University Commission, 58 percent of respondents said they were "proud" of their universities. However, 35 percent were unable to name a single thing their local university had done to engage the local community, and 30 percent of lower socioeconomic respondents had never visited a local campus.

Does This Matter?

Universities have served society well, playing a leading role in nation formation, scientific discovery, and intellectual and public discourse. But nowadays, in the context of widening socioeconomic and regional disparities within countries and competitive economic circumstances globally, there are growing concerns about student performance,

learning outcomes, and employment opportunities. The contribution of education and research and their value and impact for national and local objectives are also questioned. There are concerns that pursuit of global reputation and status have come at the expense of social responsibilities—worries that are reflected by a collapse of trust in public institutions and elites.

Accordingly, in many countries, there is growing public and political demand that universities be more accountable and deliver more public benefit to their cities and regions. Universities are being asked to stretch beyond the traditions of teaching, research, and scholarship, and to reach out beyond their walls, real or metaphorical, in order to connect with their communities and regions in ways that are novel, challenging, and impactful.

These tensions are giving rise to three interrelated issues: public attitudes toward public services, including education; degree of public trust between different sectors of society; and public interest in effective and efficient use of public resources, and the contribution and value to society.

The Engagement Agenda

"Engagement" now forms a critical part of government and, correspondingly, of higher education agendas. Historically, academic involvement in activities beyond teaching and research or scholarship was described as "service." Over the years, "service" was interpreted primarily as involvement on university committees and/or membership of professional organizations. Today, engagement between universities and society and the economy is a major issue. It is a key component of national policy making, a tool for institutional profiling, and/or an indicator of performance as part of the broader accountability and system steering agendas.

The OECD led an influential project exploring the relationship between higher education and 40 regions and cities, and the drivers and barriers for engagement. The issues were summarized in *Higher Education and Regions: Globally Competitive, Locally Engaged*. The European Union produced a guide for regional authorities on *Connecting Universities to Regional Growth*, and is now pursuing a place-based regional development strategy, called smart specialization, for which university research and the vocational education and training system (VET) are key actors. The UNESCO Global Universities Network for Innovation (GUNI) picks up on the idea of the civic university and the need to respond to grand challenges, as set out in the UN's Sustainable Development Goals (SDG), in its report *Higher Education in the World: Balancing the Global with the Local*.

The European Union has also been developing tools for institutional profiling and ranking to capture categories of knowledge exchange and regional engagement, as well as graduate employment. This began with U-MAP (2005), an