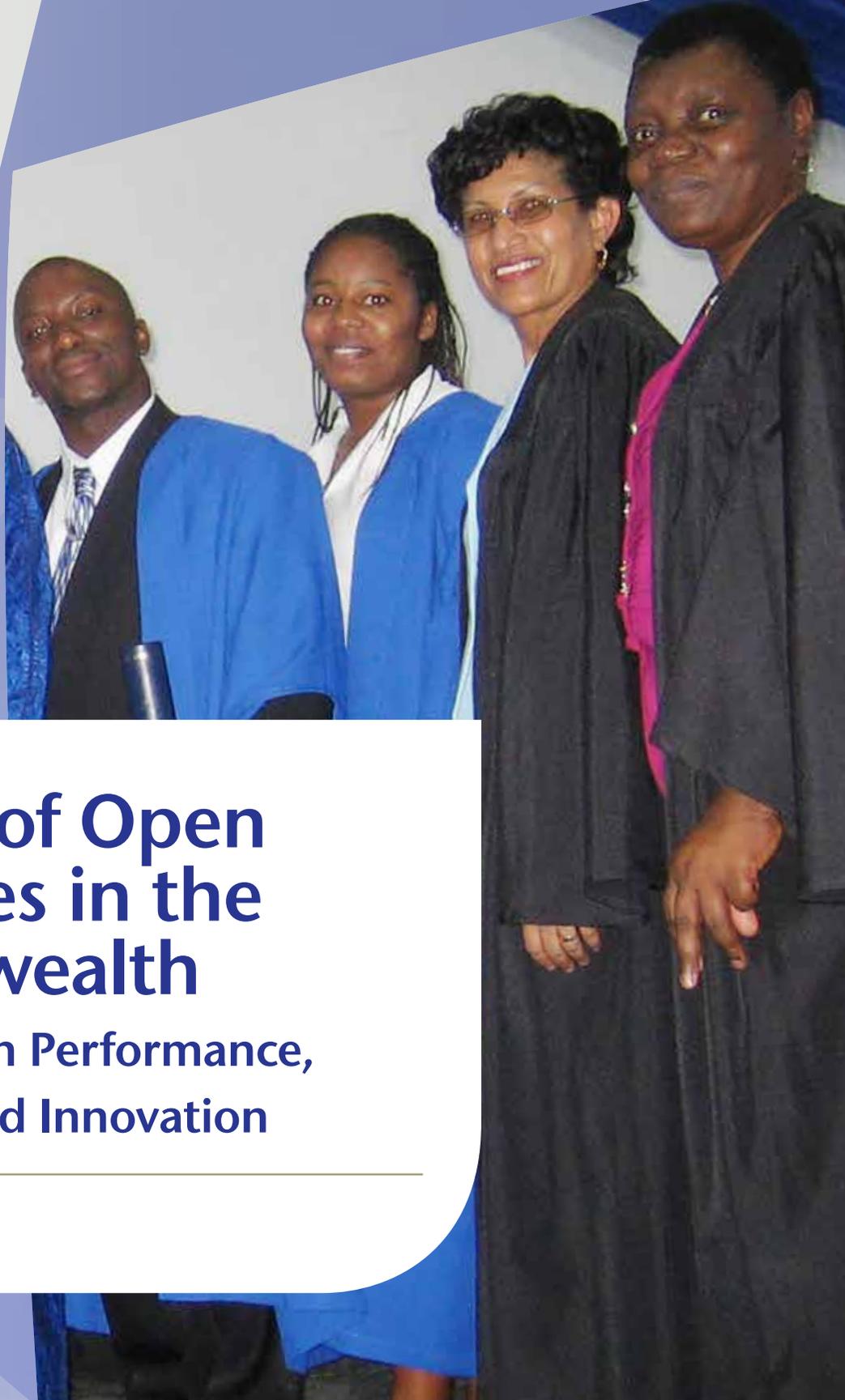# The State of Open Universities in the Commonwealth

A Perspective on Performance, Competition and Innovation

Richard Garrett

The State of Open Universities in the Commonwealth: A Perspective on Performance, Competition and Innovation

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The Observatory on Borderless Higher Education

COMMONWEALTH *of* LEARNING

The Commonwealth of Learning (COL) is an intergovernmental organisation created by Commonwealth Heads of Government to promote the development and sharing of open learning and distance education knowledge, resources and technologies.

Acknowledgements

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THE OBSERVATORY
on Borderless Higher Education

This report, commissioned by the Commonwealth of Learning, was written by Richard Garrett, Director of The Observatory on Borderless Higher Education.

The Observatory is a higher education think tank in the field of "borderless" higher education worldwide, including disruptive innovations such as online learning, internationalisation, and commercial competition and partnerships. It offers analysis on trends, business models and policy frameworks. The Observatory provides strategic intelligence for education leaders and policy makers attempting to navigate the opportunities and threats of borderless higher education.

Originally a collaborative initiative between the Association of Commonwealth Universities and Universities UK, The Observatory joined the International Graduate Insight Group (i-graduate), part of Tribal Group, in August 2010. The Observatory's membership is currently comprised of more than 160 organisational members — universities, government agencies, companies — across more than 30 countries. For more details, see www.obhe.org.

Introduction

The goal of this report is to critically examine one of the marvels of modern higher education: specialist open and distance learning (ODL) universities. These institutions, such as The Open University (UKOU), Indira Gandhi National Open University (IGNOU) and the University of South Africa (UNISA), have pioneered radically innovative instructional and support methods, opening pathways for vast numbers of non-traditional students.

In the second decade of the 21st century, how might the success of these institutions be judged? Most were founded 30–50+ years ago as public universities dedicated to ODL, in contrast to the experimentation by conventional universities that had characterised much prior ODL activity. These new institutions were charged with widening access to higher education amongst various non-traditional or under-served populations at a unit cost substantially below the norm for conventional institutions but with comparable academic quality.[1]

The core focus of the report is ODL universities in the Commonwealth, but examples from other countries are also considered. The report was commissioned by the Commonwealth of Learning (COL). COL was founded in 1988 to further the wide range of ODL efforts established across the Commonwealth, with a strong emphasis on ODL as a force for development. At that time, ODL was largely identified with specialist public-sector universities (e.g., UKOU, UNISA) or with regional institutions that offered both conventional and ODL programming to expansive geographies where little other higher education was available (e.g., The University of the West Indies and The University of the South Pacific).

Today, there are dedicated ODL higher education institutions in many Commonwealth countries, but in most cases, ODL is no longer first and foremost the domain of specialists. In the 1990s, the rise of online learning promised a range of enhancements to legacy forms of ODL, in terms of interaction, engagement and simulation, and attracted the attention of both conventional universities and the private sector. New models were characterised as means to advance the perennial goals of ODL — to widen access to higher education and lower cost whilst maintaining quality — but also as tools to address the issues of affordability and productivity in mainstream higher education. The online learning explosion paralleled the massification of higher education worldwide, creating new capacity, cost and quality pressures at the system level.

The past two decades have witnessed numerous institutional and commercial experiments with different iterations of online learning. Regardless of country, the majority of higher education students still study in person at conventional institutions, but a growing proportion do so wholly at a distance, and a "traditional" student experience is increasingly a blend of conventional methods and new technology.

For example, in the United States, reports from the Online Learning Consortium (formerly Sloan-C) chart the growth of higher education students taking one or more online courses. The latest report points to more than seven million students taking at least one online course, about a third of all students.[2] Online courses — and full degree programmes — are now offered by hundreds of

American universities and colleges. In Malaysia, the Asia e University initiative is a government-backed attempt to enable domestic universities to offer their growing array of online degrees to a wider audience. In Sri Lanka, the government has invested in a National Online Distance Education Services operation to help grow online learning capacity across public higher education.

The massive open online course (MOOC) phenomenon is the most recent major ODL development, driven primarily by conventional, elite universities. MOOCs, exemplified by free, non-credit courses from top faculty and delivered to vast numbers of students, both echo longstanding ODL goals and question assumptions about product and provider. The related open educational resources (OER) movement, attempting to increase the scalability and minimise the cost of educational materials, has also gained momentum, but widespread adoption remains a distant hope.[3]

Not surprisingly, the level of interest in online and open learning, and the range of institutions and organisations involved, has led to outstanding successes, dismal failures and much in between. There is greater awareness of ODL and its potential than ever before; however, contemporary modalities are evolving through trial and error, and ODL's reputation remains complex.

Specialist ODL institutions continue to play a distinctive role in Commonwealth countries and elsewhere, but COL seeks to capture the current state of play in context. COL wants to better articulate the achievements of specialist ODL institutions in the Commonwealth and to highlight areas for improvement, not least in light of alternative models and arrangements elsewhere. Hence, in this report:

- Section 1 distils the current activity of selected specialist ODL higher education institutions in the Commonwealth.

- Section 2 critically reviews the quality assurance (QA) and return-on-investment (ROI) mechanisms and data reported by specialist ODL institutions.

- Section 3 benchmarks Commonwealth ODL specialist institutions against the ODL activity of selected mainstream universities and non-Commonwealth ODL specialist institutions worldwide. A comparison of QA and ROI information is a key part of this section.

As enrolments and costs rise, higher education worldwide is under increased pressure for greater transparency — in terms of spending, pedagogy and outcomes — for students and taxpayers. ODL institutions sometimes find themselves under particular pressure in this respect, since they tend to combine large scale with non-traditional characteristics that may be poorly understood by politicians and the media. It is in the interests of specialist ODL institutions to innovate on transparency as well as delivery mode. Despite decades of activity, distance learning enjoys a mixed reputation; too often it is associated with one-dimensional learning and high student attrition. Specialist ODL institutions have a vital role to play in continuing to expand access to higher education, but they must be fully cognisant of changing times in terms of alternative models, competition and the value of ROI information.

In the interests of enhancing the reputation of ODL, this report recommends the types of performance indicators that COL might encourage specialist ODL higher education institutions in the Commonwealth to adopt and benchmark.

Methodology

This project relied on secondary data. Institutional and organisational websites and specialist literature were the main sources. The decision to focus on secondary data, rather than attempt a survey, conduct interviews or otherwise seek internal intelligence, was due partly to time constraints but also to a wish to take the perspective of an outsider. This report aims to evaluate specialist ODL institutions in the Commonwealth in an environment of competition and scrutiny, where clarity of purpose and transparency of value are essential.

Analysis of the information these institutions place in the public domain — on their websites and in annual reports and the like — offers an important perspective. Such public-facing information is a good proxy for what is available to prospective students, the media and the general public. This is how ODL institutions present themselves to the world, position their strengths and describe their value. Government agencies or QA bodies may be privy to additional information, and academic studies sometimes reveal important details; such information has been drawn upon where available, but the premise of this report is that information squarely in the public domain reveals much about institutional priorities, effectiveness and distinctiveness. Our interest therefore lies first and foremost in the "teaching" side of the sample institutions, rather than research or other activities.

To provide additional focus, the author chose to examine ten specialist ODL institutions in the Commonwealth. This afforded a manageable number but a sufficient range to be broadly representative. The ten span developed, emerging and developing countries, in all regions of the Commonwealth, and institutions of various ages and types.[4] They are:

- Athabasca University (AU, Canada)
- Indira Gandhi National Open University (IGNOU, India)
- National Open University of Nigeria (NOUN)
- Open Universities Australia (OUA)
- The Open University (UKOU, United Kingdom)
- Open University Malaysia (OUM)
- Open University of Sri Lanka (OUSL)
- University of South Africa (UNISA)
- University of the South Pacific (USP)
- University of the West Indies (UWI)

All of the sample institutions either are public or, in the cases of OUM and OUA, are private companies owned by consortia of public universities. UKOU, UNISA, NOUN and OUSL are unique national ODL institutions founded by governments. IGNOU is similar but until recently

had the additional role of monitoring the QA of ODL higher education institutions for India as a whole. This function has been passed to India's University Grants Commission. USP and UWI are unique regional institutions formed to build higher education infrastructure where it was previously lacking and were first established in a colonial or semi-colonial context. Both USP and UWI partner with other regional higher education institutions to offer programming in particular locations. Athabasca University is a provincial public university located in the province of Alberta but has asserted a national identity as "Canada's open university."

In Section 1, these universities are profiled in terms of programme number, level and range, enrolment over time, student demographics, delivery mode, pricing and finances. Section 2 is focused on ways in which the sample specialist ODL institutions attempt to demonstrate quality and articulate ROI.

Section 3 turns to examples of selected ODL activity at non-specialist institutions in the Commonwealth, and ODL examples — specialist and non-specialist — outside the Commonwealth. The emphasis is on activity that purports to advance ODL objectives innovatively. This section considers how the Commonwealth ODL institution sample compares to these institutions and initiatives in terms of characteristics and evidence of "success."

SECTION 1
Specialist ODL Universities in the Commonwealth: Mapping Our Sample

This section profiles the fundamental characteristics of ten sample ODL institutions. It must be stressed at the outset that the sample contains significant diversity. Some institutions are more or less wholly distance learning operations (e.g., AU, OUA, UKOU), whilst others combine multiple delivery modes, including face-to-face and conventional classrooms. Some institutions were founded to complement a mature conventional university sector (e.g., IGNOU, OUM), whilst others represent the major source of higher education across an entire region (e.g., USP, UWI) rather than a distance learning alternative. When these latter institutions were founded, distance learning was judged an essential component of meeting general higher education needs across a dispersed geography. All sample institutions are "open" in the sense of encouraging less traditional applicants to come forward, but they may also require conventional prerequisite qualifications for entry to degree programmes. Credit for prior learning, challenge exams and other pathways contribute to an "open" ethos.

1.1   Enrolment

Table 1 summarises total enrolment, enrolment by academic level and enrolment trends over time. Foundation year is also given — ranging from the creation of UWI in 1948 through to the opening of OUM in 2001. Table 1 is ordered from largest to smallest enrolment, using the most recent data available. Where an institution explicitly reports an enrolment total and assigns a year, this is noted. Where a recent enrolment total is presented without a clear anchor in time, no year is given. Please note that "enrolment" refers to unique headcount, not to individual course enrolments or full-time equivalent figures. Even headcount may mask inconsistencies. For example, at one institution (such as AU) many students are enrolled in only a course or two, whereas at others (such as UKOU), most students are enrolled in full degree programs.

Table 1. Sample Specialist ODL Institutions: Enrolment Scale and Trends

INSTITUTION	FOUNDED	ENROLMENT	ENROLMENT BY LEVEL	TREND OVER TIME
IGNOU	1985	c. 722,000[5]	Not reported — but appears to be majority undergraduate	Up strongly over the long term but down in the short term, following the close or hiatus of numerous "community colleges," MOUs and foreign alliances. The most recent data suggest growth has returned.[6]
University of South Africa[7]	1873 (as a wholly distance institution from 1959)	c. 350,000 (2013)	c. 90% undergraduate, 10% graduate	Steady growth over time. Up almost 50% since 2007.
The Open University[8]	1969	c. 187,000 (2013/14)	92% undergraduate, 8% graduate	Down by c. 25% since 2010/11, following UK funding changes for part-time students
National Open University of Nigeria[9]	1983 (then suspended; revived in 2001)	c. 120,000	Not reported — but appears to be majority undergraduate	Unclear — conflicting data
Open University Malaysia	2001	c. 90,000	Not clearly reported — appears to be majority undergraduate	Little clear enrolment reporting. Last annual report appears to be 2010, which says 89,000. Wikipedia says 100,000. Clearly strong growth up to c. 2010.
Open Universities Australia[10]	1993 (as Open Learning Australia)	c. 60,000	Not reported — but appears to be majority undergraduate	Up strongly following student access to national financial aid scheme. Most recent annual report (2013) does not disclose enrolment, suggesting stability or decline.
University of the West Indies	1948	c. 47,000 (2011/12)	c. 80% undergraduate, 20% graduate	Up about a quarter since 2007/8
Athabasca University[11]	1970	c. 41,000 in 2013/14 (7,800 FTE)	90% undergraduate, 10% graduate	Slow growth in recent years. Up about a third in a decade. 50% of undergraduates transfer AU credits to their home (mostly Canadian) degree programs.
Open University of Sri Lanka[12]	1978	c. 38,000 (2013)	c. 83% undergraduate, 17% post-graduate	Strong growth over time. Up over 50% since 2007.
University of the South Pacific	1968	c. 25,000 (2013)	Unclear but appears to be majority undergraduate	Up about a third since 2009

All of the sample institutions are large by some measure, ranging from the giant IGNOU — one of the largest universities in the world, with over 700,000 students — to USP, with about 25,000, comparable to a mid-sized conventional university in many countries. All the institutions offer undergraduate and post-graduate programming, but undergraduate students dominate, constituting 80–90 per cent of the population in most cases.

In a number of instances, it was surprisingly difficult to find up-to-date enrolment data. There is also the problem of what counts as an "enrolment," with some institutions reporting unique headcount, some course-level enrolments and others full-time equivalencies. Most institutions made available some kind of annual report or statistical abstract on their website, but in some cases, the most recent document was three to five years old. Some websites presented contradictory figures. The NOUN and OUM sites were particularly limited in terms of enrolment data. Few institutions reported enrolment trends over time, and some did not clearly break enrolment figures down into undergraduates and graduates. In some countries, a national higher education agency publishes enrolment data at the institutional level.

All of the sample institutions have grown strongly since foundation, and many have exhibited strong or steady growth in recent years. Some have suffered fluctuation or even marked decline. The biggest case of decline is IGNOU, which scaled back a large "community college" and international alliances initiative, citing quality concerns, thereby relinquishing hundreds of thousands of students in the process. UKOU has seen enrolment fall by a quarter since 2010/11, following the introduction of higher tuition fees for all UK undergraduates. Whilst full-time undergraduate enrolment nationally recovered after an initial blip following the introduction of higher fees, part-time student enrolments, on which UKOU depends, have fallen sharply — there were 30 per cent fewer new part-time undergraduates in the UK in 2013/14 than in 2010/11. This is despite government funding that offers part-time undergraduates a means-tested loan with no repayments until three years after the start of their studies, and only after a certain income threshold has been reached. Prior to the introduction of higher fees, part-time students were not eligible for financial support. The theory behind the enrolment decline is that prospective part-time students may be debt averse and particularly concerned about higher fees (Jones, 2015).

1.2   Programmes

What range of programmes do sample institutions offer? Table 2 notes whether an institution offers any non-tertiary programming (e.g., literacy, basic skills, or non-credit/continuing education), and the extent of undergraduate and post-graduate offerings. Such offerings are dubbed "limited" if confined to a small number of programmes (fewer than ten) in a few fields (fewer than five), "moderate" if there are ten to 30 programmes in five to ten fields, and "comprehensive" if a larger number of programmes is offered across a broad range of fields, comparable to at a conventional comprehensive university. In Table 2, "sub-degree" refers to for-credit certificates and diplomas. Table 2 also captures whether an institution offers doctoral programmes.

Table 2. Sample Specialist ODL Institutions: Types of Programmes

INSTITUTION	NON-TERTIARY OR NON-CREDIT	UNDERGRADUATE PROGRAMMES	TAUGHT POST-GRADUATE PROGRAMMES	DOCTORAL PROGRAMMES
Athabasca University	For-credit courses available in isolation	Comprehensive (master's and sub-degree)	Moderate (master's and sub-degree)	2 (DBA, EdD)
IGNOU	Range of continuing education efforts, including literacy and other rural development	Moderate (bachelor's), comprehensive (sub-degree)	Comprehensive (master's and sub-degree)	20+
National Open University of Nigeria	"Access" programming for degree entry	Comprehensive (bachelor's), moderate (sub-degree)	Moderate (master's and sub-degree)	c. 20
Open Universities Australia	Various "units" to prepare for degree entry. Open Training Institute (career-focused certificates).	Moderate (master's and sub-degree)	Comprehensive (master's and sub-degree)	1 (Juris Doctor)
Open University Malaysia	International Open College (non-degree, for-credit programmes aimed at school-leavers)	Moderate (master's), limited (sub-degree)	Moderate (master's)	c. 10
Open University of Sri Lanka	Various courses and workshop on a range of general and specialist skills	Moderate (bachelor's and sub-degree)	Moderate (master's and sub-degree)	< 5
The Open University	OpenLearn (free non-credit courses). Partner in FutureLearn, the major MOOC provider. Corporate training.	Comprehensive (bachelor's and sub-degree)	Comprehensive (master's and sub-degree)	Wide range of doctoral options, if few "programmes"
University of South Africa	"Short learning programmes" (non-credit), "just-in-time" professional development	Comprehensive (bachelor's and sub-degree)	Comprehensive (master's)	100+
University of the South Pacific	Various courses and workshop on a range of general and specialist skills	Moderate (bachelor's and sub-degree)	Moderate (master's and sub-degree)	Wide range of doctoral options, if few "programmes"
University of the West Indies	Access and continuing education offerings	Comprehensive (master's and sub-degree)	Comprehensive (master's and sub-degree)	c. 10

Based on Table 2, 60 per cent of the sample offers a comprehensive range of undergraduate programmes, with 40 per cent judged "moderate." At the post-graduate level, the sample is split 50/50 between "comprehensive" and "moderate." Only three institutions — UKOU, UNISA and UWI — are "comprehensive" at both undergraduate and post-graduate levels. As expected, relatively smaller institutions offer fewer programmes. All institutions offer doctoral programmes.

Whilst most of the sample institutions span academic and professional subjects and thereby position the institution as comprehensive, career value is emphasised. OUA takes this one step further. Its "Career Advice" tool enables users to enter a job title and see national figures for number employed, change over time, projected change, entry and progression norms, salary, and job characteristics. A sidebar notes OUA programmes that relate to the job in question.

In terms of non-credit or non-tertiary provision, the large "regional" institutions, such as IGNOU, USP and UWI, offer both pathways to academic study and a range of continuing and basic education, as well as teacher training. The other institutions tend to confine themselves to pathway programmes. Most sample institutions offer some form of credit for prior learning. Some form of corporate training is quite common, although sample institutions tend not to report activities in much detail.

Whilst many institutions make individual for-credit courses available in isolation, only UNISA appears to offer fee-based non-credit courses for professional development. UKOU seems to be one of only three examples of an institution offering "free" non-credit courses, from 2006 through its own OpenLearn site and more recently as a founding partner in FutureLearn, the major UK MOOC initiative. OUA offers "Open2Study," free four-week courses open to anyone, drawn from the OUA catalogue and designed to refresh study skills. NOUN is partnering with UNESCO on a MOOC and OER strategy, arguing that widening access to NOUN courses furthers its mission and will help publicise the university's fee-based programming. AU has delivered a number of MOOCs, including a recent one using the Canvas platform; AU faculty members offered the world's first MOOC in 2005.

1.3 Student Demographics

All sample institutions were founded to broaden access to higher education, but few publish much detail on student characteristics. For example, the IGNOU website states:

> Specific efforts shall be made for providing access to education and equity in opportunities to women, Scheduled Castes, Scheduled Tribes, the rural population, the remote areas, tribal regions, differently-abled, and the socially and economically weaker sections of society.[13]

However, the site appears to offer no data to permit a clearer understanding of how enrolment breaks down across such groupings, or comparisons with figures for the general population or higher education overall.

AU is an exception, as its most recent annual report segments enrolment by geography, gender, indigenous groups and disability. OUSL distinguishes gender, age, regional centre and language of study. UKOU specifies student age and disability.

Female students tend to be in the majority at sample institutions where such data are available. For example, UNISA reports that in 2013, 63 per cent of students were female (UNISA, 2013, p. 13). At UWI, the student population is about 69 per cent female, and a report noted a steady decline in male enrolment over time (UWI, 2010). At OUSL, women are dominant amongst undergraduates but still a minority at the master's level (OUSL, 2013, p. 24). At some distance-only institutions, older students (aged 25+) predominate, but at the likes of USP and UWI, traditional-age students are in the majority. At UWI's Open Campus — a combination of distance learning and regional centres away from the university's three main campuses — over 80 per cent of students are aged 25 and above.

Some sample institutions profile individual students or graduates to exemplify the impact of the institution or the diversity of enrolees, but these featured profiles are rarely accompanied by statistics that speak to the student or graduate population as a whole.

Some sample institutions engage in extensive international activity and enrol large numbers of international students or users. For example, UKOU has pursued a host of initiatives in Africa to help train more teachers and health workers. Under the TESSA (Teacher Education in Sub-Saharan Africa) programme, UKOU claims to have reached over 500,000 teachers in ten countries and four languages. The work is now being extended to India. In Bangladesh, the university's "English in Action" effort uses inexpensive mobile phones to get educational materials in the hands of users and is on target to reach 25 million people by 2017 (UKOU, 2013, p. 39).

IGNOU notes alliances with 29 international institutions, mostly in the Middle East and Africa, and a desire to serve the Indian diaspora, but few details appear to be in the public domain. As previously noted, IGNOU announced a freeze on international activity, following concerns about QA. UNISA is positioned as a university for all of Africa, and the university has established some regional partnerships, notably in Ethiopia. Non-South African students number about 30,000, primarily in bordering countries, and constitute approximately eight per cent of total enrolment (UNISA, 2013, p. 14). OUM launched an international division in 2008 and now has centres in nine other countries, including Ghana, Hungary and Vietnam. The Maldives branch has almost 3,000 students and the Bahrain branch almost 1,000. The others have a few hundred each. OUM International also engages in related consulting and capacity building, such as a contract to build what is now the National Center for e-Learning and Distance Learning, in Saudi Arabia (Observatory on Borderless Higher Education, 2010). AU has an alliance with the Arab Open University to offer Athabasca's courses and programmes (AU, 2014, p. 18).

International students represent a small minority of enrolments at sample institutions, where reported. For example, international students constitute about two per cent of enrolment at Athabasca, and the number has shrunk somewhat in recent years. This may be due to a tuition freeze in Alberta, Athabasca's home province, persuading the university to raise fees for out-of-province and international students. At UKOU, international students constitute about five per cent of enrolments. Approximately 10,000 people based outside the UK were enrolled in UKOU programmes in 2013/14; a further 32,000 students were enrolled in programmes offered by other institutions but validated by UKOU.[14]

1.4   Market Share and Contribution

How significant are the sample institutions in enrolment terms in their national or regional contexts? Open and distance universities were designed to expand access, and they frequently operate at a scale that would be challenging for a more conventional institution. Many sample institutions are the largest in their country or region and often much larger than all or most conventional universities.

To what extent are our sample institutions major players or, ultimately, one university amongst many? Table 3 offers estimates; it is concerned with total higher education enrolment, not total distance enrolment in higher education, for which official and reliable figures are rarely available.

Table 3. Sample Specialist ODL Institutions: Higher Education Market Share

INSTITUTION	TOTAL ENROLMENT, MOST RECENT YEAR*	TOTAL ENROLMENT, NATIONAL OR REGIONAL	% OF SAMPLE INSTITUTION
Athabasca University	c. 41,000 (2013/14)	c. 2 million	c. 2%
IGNOU	c. 722,000	c. 28 million	c. 2.5%
National Open University of Nigeria	c. 120,000	c. 1.8 million	c. 6.7%
Open Universities Australia	c. 57,000	c. 1.4 million	c. 4.1%
Open University Malaysia	c. 84,000	c. 1.1 million	c. 7.6%
Open University of Sri Lanka	c. 38,000 (2013)	c. 300,000	c. 12.7%
The Open University	c. 150,000 (2013/14)	c. 2.3 million	c. 6.5%
University of South Africa	c. 319,000 (2013)	c. 1.2 million	c. 27%
University of the South Pacific	c. 25,000 (2013)	Unclear	Majority
University of the West Indies	c. 47,000 (2011/12)	c. 120,000 (English-speaking Caribbean)	c. 39%

*Listed enrolled total has been revised to exclude any known international students enrolled in their own country (outside any regional remit of the institution). This offers a better gauge of the institution's share of the national or regional market. For some institutions, estimates were made of international enrolments. For Table 3 and throughout this report, "enrolment" refers to headcount.

Based on Table 3, one sample university, USP, is thought to constitute the majority of higher education enrolment in its region, although reliable regional data appear not to be available. UWI is also in a dominant position but losing its share over time as the region's higher education infrastructure continues to evolve. The case of UNISA is remarkable. The institution accounts

for more than a quarter of the country's higher education headcount enrolment and more than a third of its university headcount. This is a rare example of a dedicated ODL institution managing to achieve a truly nationally significant share of total higher education enrolment. Many UNISA students are part-time, so the institution's share of FTE (full-time equivalent) students is lower. In 2012, UNISA had about 170,000 FTE students,[15] which is estimated to be about 21 per cent of its total.

The next closest ratio is from OUSL, which accounts for about 13 per cent of total higher education enrolment in that country. The other sample institutions are in the single digits. This is not to diminish their achievement or significance but does emphasise that in most countries, a single ODL specialist institution, even one that is long established and has a unique national mandate, does not impact more than a small proportion of total higher education students. Indeed, if FTE ratios were calculated, the share of many of the sample institutions would be smaller still. The reasons why the sample institutions, and specialist ODL institutions generally, have typically not achieved greater market dominance are many and will be explored in Section 2, when evidence for QA and ROI is examined, and in Section 3, when other ODL examples are discussed.

1.5   Delivery Mode

The term "open and distance institution" covers a wide range of models and arrangements within our sample. Some institutions are wholly distance based, whilst others run substantial numbers of in-person classes. Some operate multiple regional centres. Some operate largely online but all also deploy other forms of distance learning, with online delivery as one component. Here, we examine each sample institution in turn.

IGNOU. IGNOU employs multiple delivery modes. Most students use print-based self-study materials, with the option of in-person or telephone/video conferencing for interaction with "counsellors" (i.e., non-faculty support staff). IGNOU runs 56 regional centres, each of which oversees often many more study centres, numbering over 3,000 in total. There is a regional centre in most parts of India. Regional centres offer library and audio-visual facilities as well as Internet access. Regional centre staff train local counsellors, conduct certain examinations and liaise with local authorities. For students in highly practice-based programmes, some regional and study centres offer specialised equipment. IGNOU runs its own radio and television channels, often satellite-based, offering another way for learners to study. The television programmes are now archived on YouTube. The university also runs about 20 online degree and sub-degree programmes, primarily at the post-graduate level. There appear to be no IGNOU data showing enrolment distribution by delivery mode, and no doubt many students use multiple modes. Clear enrolment distribution by delivery mode is missing at most sample institutions.

UNISA. UNISA began as a print-based correspondence university, and some print materials are still used today. However, the university is moving towards a more online-centric model. Most post-graduate programmes are now conducted largely online. At the undergraduate level, print materials are still used, and regional centres offer group-based tutoring sessions as well as student support and technology facilities. Support counsellors are available at regional centres and also by letter, phone and email. There are ten regional libraries in South Africa. All undergraduates must now complete at least one online module. "E-Tutoring" is the online equivalent of the in-person tutoring sessions. The university plans to move to a wholly online delivery model in the coming years. UNISA offers students inexpensive options to purchase

computers and Internet access and is experimenting with offline storage devices for students with no Internet access at home or work.

UKOU. UKOU continues to use print-based materials, as well as CDs and DVDs, as a standard part of its model, but the centre of gravity is now online. Indeed, all course materials are now available online and for students to download (although all students continue to receive physical copies). Students connect with fellow learners and tutors through online forums, as well as by email and phone. Each student is assigned a tutor, who is typically a part-time faculty member. The longstanding practice of in-person group tutorials continues for interested students at over 350 study locations across the UK.

NOUN. NOUN is a primarily print-based institution but is actively experimenting with online resources. As with IGNOU, NOUN students can choose to study by means of radio, television, DVDs, etc. NOUN operates 63 study centres across Nigeria, where students can access study materials and talk to a counsellor.

OUM. OUM has two types of student: blended and online. Blended students move between "self-managed learning" (print or digital study materials and remote access to peers, tutors and faculty), "face-to-face tutorials" (three to five two-hour sessions per semester, with 25–30 other students and a tutor) and "online discussion forums" (asynchronous interactions between students and tutors). There are 13 "learning centres" across Malaysia. Online students engage only with digital content and interact with students and tutors solely online.

OUA. OUA offers four delivery mode options: fully online, "Web dependent" (most material delivered online, plus some physical items), "Web supplemented" (mostly physical materials, with some online) and "print only" (with the option to contact support services electronically). "Student coaches" are available on demand via phone or online to help with study skills. OUA contracts with Smarthinking, an American student support firm, to provide this service — at no extra cost to students. There is also a "Study Tracker" online tool to help students manage deadlines.

UWI. Unlike most of the sample institutions, UWI has physical campuses, in Barbados, Jamaica and Trinidad. These sites resemble conventional university campuses, and students attend regular in-person classes. UWI's "Open Campus" combines smaller physical study centres elsewhere in the region (nearly 50 centres across 17 countries in the English-speaking Caribbean) and online study. Online students are still very much in the minority amongst Open Campus students. The 2013/14 Open Campus annual report points to about 6,300 online students at the undergraduate level (approximately 16 per cent of all undergraduates) and 381 at the post-graduate level (approximately four per cent of the total) (UWI, 2014, p. 98–99). Students at the main campuses increasingly utilise online resources for study purposes.

AU. According to the AU website, the university continues to work with a range of delivery modes: multi-media, online activities, print materials, web, email, Internet, CD-ROM, computer software, audio/video conferencing, audio/video tapes, TV and radio. A particular course might draw on one or more modes. Most undergraduate courses are for self-paced study, allowing continuous enrolment, but some require or have the option of "grouped study," in which a faculty member works with a group of students, either online or in person at a partner institution. A range of support staff is available on demand by phone and email.

OUSL. OUSL operates primarily with print-based and other physical study materials (e.g., CDs/DVDs of the university's radio and television content) and a national network of regional centres and study centres. There is a central library, plus regional branches. In addition, many students take part in in-person group classes, and there is also a growing number of online courses available. In contrast to other institutions in the sample, where part-time enrolment is common, all OUSL students study full-time.

USP. USP operates 14 campuses and centres across 12 member countries in the region. Many students study at conventional campuses, and the latest university prospectus positions cohort-based study at regional campuses as a trend (USP, 2015, p. 31). The number of wholly online programmes is growing, and many students engage in "flexible" delivery — i.e., they use online or other study materials as well as attend regional campuses and centres. In 2013, face-to-face learning made up 45 per cent of FTE enrolment and print-based study 39 per cent; online and blended constituted the remaining 16 per cent (USP, 2014, p. 22).

In summary, delivery mode is a complex matter for the sample ODL institutions. Most operate physical centres, print production facilities, various audio and video production facilities and online development facilities. Online may be in the ascendant, but in most cases there is little sign that it will become the sole delivery mode anytime soon. In 2015, despite two decades of online learning experience in the wider market, no sample institution is committed to wholly online delivery, although a number are moving in that direction. Continued use of legacy technologies — print, CD, video, etc. — partly reflects accustomed ways of working but also indicates students' uneven access to technology as well as the concern that wholly online study might not be the best fit for many students who turn to ODL institutions. We will return to this issue in Sections 2 and 3.

1.6   Tuition Fees and Finances

Given economies of scale and less labour-intensive operational models, ODL institutions tend to be less expensive compared to conventional universities. It is interesting that no sample institution makes much effort to contrast their tuition fees against national norms. UKOU gives an average annual tuition fee and notes that it is less expensive than average but does not say by how much. (The OU figure is £5,400 a year for full-time study, which contrasts with £9,000 at most UK universities, under the country's new fee regime.) UNISA's website says its fees are cheaper than most other universities' but offers no further details. At OUA, the list of fees is long and complicated, given the number of partner universities involved, and no strong claims are made about relative affordability. At the other sample institutions, any claims about relative affordability are either similarly muted or non-existent. At UWI and USP, price competition is less of an issue, given the dominant role each institution plays in its regions.

What about the financial health of sample universities? Table 4 indicates whether the institution most recently reported a surplus or loss, compares this to the prior year and notes the institution's reserves.

Only five of the sample institutions put sufficient financial information in the public domain to contribute to Table 4. Of these five, for the most recent year available, three reported a surplus and two a loss. The two cases of loss (UKOU and USP) both have large reserves (approximately 60 per cent of revenue). One case of surplus — AU — experienced a loss the prior year and

avoided a second loss by cost cutting. AU's reserves are much smaller, at just 3.8 per cent of revenue.

UKOU cited two main causes of weaker financial performance: (i) the recent change in the UK funding regime, whereby grants to institutions were reduced and institutions were permitted to charge higher tuition fees, and (ii) in response to higher fees, the dramatic decline in part-time undergraduate students nationwide, undergraduates being the dominant population at UKOU. AU pointed to reduced provincial funding and a tuition freeze for Albertans, which prompted the institution to raise fees for students from other provinces and abroad. The loss at USP is not clearly accounted for in the latest annual report but appears to be due to higher staffing and operating costs.

Table 4. Sample Specialist ODL Institutions: Finances

INSTITUTION	SURPLUS OR LOSS (MOST RECENT YEAR, % OF REVENUE)	COMPARISON TO PRIOR YEAR	INSTITUTIONAL RESERVES (% OF REVENUE)
Athabasca University	**1%** (c. CAD 1.3m, 2014)	Improved from loss	3.8% (CAD 5m)
IGNOU	No data	N/A	No data
National Open University of Nigeria	No data	N/A	No data
Open Universities Australia	Insufficient data	N/A	Insufficient data
Open University Malaysia	No data	N/A	No data
Open University of Sri Lanka	**7.2%** (SLR145B, 2013)	Improved surplus ratio	8.4% (SLR170B)
Open University UK	**−4%** (−£6.9m 2013/14)	Declined from surplus	63% (£255m)
University of South Africa	**18%** (R1.1B, 2012)	Improved surplus ratio	127% (R7.9B)
University of the South Pacific	**−1%** (Fiji −$1.8m)	Declined from surplus	61% (Fiji $106m)
University of the West Indies	Insufficient data	N/A	Insufficient data

B = billion; m = million

UNISA is the most obvious success story, reporting an 18 per cent surplus in 2012, with reserves at 127 per cent of revenue.

To summarise Section 1, sample ODL institutions are typically the largest (or amongst the largest) in their country or region, although higher education market share greater than ten per cent is rare. Most institutions offer a wide range of degree programmes, by level and field, as well as engage in a variety of non-credit activities, research and service initiatives. ODL students tend to be older

than their conventional peers, with a female majority. No institution is characterised by a single delivery mode — most pursue multiple methods — but online learning is in the ascendant. Most sample institutions continue to grow enrolment, but a few have experienced fluctuation or decline. Financial information is often patchy and, where available, presents cases of surplus and deficit.

SECTION 2
How Do the Sample Institutions Deploy Quality and ROI Information?

Section 1 offered summary information on ten sample specialist ODL institutions in the Commonwealth. All these institutions have achieved a great deal over time, each becoming the largest higher education institution in a country or region, or a unique centre of innovation and good practice. The question this section seeks to tackle is how these institutions articulate their success. What approaches and methods do they use? What data do they turn to? Is "success" defined internally or subject to the norms of third parties?

The premise of this section is that it is in the interest of institutions to think critically about how they articulate value, relative to other institutions as well as evolving market and regulatory needs and pressures. At their time of foundation, many of our sample ODL institutions were judged to be highly innovative; but now, often decades later, in a new context and amid fresh conceptions of innovation, how do the institutions address their remit?

Using public-facing information, we try to assess how sample institutions present their "success" to the world. The report's focus is on the "teaching" side of sample institutions, rather than research or other activities. This section is therefore less concerned with the *process* of required national QA arrangements and more concerned with outcome statements arising from such processes.[16] We are also not concerned here with financial reporting standards, or with corporate social responsibility or sustainability efforts.

A related question is: What should we use to define "success"? Enrolment numbers? Graduation rates? Graduate employability? Institutional productivity? And what is the benchmark? Internal historical performance, other specialist ODL institutions or conventional universities?

There is no shortage of literature on what constitutes a high-quality academic and student support infrastructure in ODL institutions (Tait & Gore, 2015). This report poses the question: What success metrics are individual institutions willing and able to disclose?

Table 5 offers an overview of the kinds of "success" information sample institutions publish. It also gives a sense of the kinds of information that apparently are rarely published.

Table 5. Sample Specialist ODL Institutions: QA and ROI Information

INSTITUTION	GRADUATE NUMBERS/RATES	GRADUATION EMPLOYMENT	PRODUCTIVITY	QA OUTCOMES OR ATYPICAL QA	ANNUAL REPORT
Athabasca University	Reports graduate numbers and by level	No info	Internal performance metrics on student access, academic quality and research (amongst other features)	Accredited by the US Middle States Commission (since 2006). Provincial/national student satisfaction benchmarks.	Yes, with archive, plus planning documents
IGNOU	No info	No info	Nothing beyond general description of ODL model	Major 2012 report on programming rationalisation published (IGNOU, 2012)	No, but management and other meeting minutes are online
National Open University of Nigeria	No info	No info	No info	No mention beyond standard governance and QA arrangements	No
Open Universities Australia	25% completion rates for Open2Study versus "7%" MOOC norm	Profiles of individual students	No info	Cites quantitative student performance improvements following implementation of on-demand student success initiative	Yes, with archive
Open University Malaysia	No info	No info	No info	No mention beyond standard governance and QA arrangements	No current report available
Open University of Sri Lanka	Reports graduate numbers and by level, field and centre	No info	Strategic plan sets out large number of key performance indicators, including graduate numbers	No mention beyond standard governance and QA arrangements	No, but planning and statistical documents online
The Open University	Reference to annual graduate total and by level	Profiles of individual graduates	Research output and accessibility	High scores on UK's National Student Survey	Yes, with archive
University of South Africa	Reference to annual graduate total and by level. Related performance objectives (but limited reporting).	No info	Reference to UNISA's share of students and graduates nationally. Spending per graduate. Research productivity dashboard.	Going through "King III" governance review (South Africa-specific process to enhance governance across the economy). EthicsSA review result stated. Tracks staff racial composition.	Yes, with archive

INSTITUTION	GRADUATE NUMBERS/RATES	GRADUATION EMPLOYMENT	PRODUCTIVITY	QA OUTCOMES OR ATYPICAL QA	ANNUAL REPORT
University of the South Pacific	Reports graduate numbers by level and field. Lists graduate attributes.	No info	Research output	Audit by New Zealand Universities Quality Agency. Pursuing regional accreditation in the USA (WASC). Internal student satisfaction survey.	Yes, with archive, plus planning documents
University of the West Indies	Reports graduate numbers and characteristics. Some historical student retention analysis. Lists graduate attributes.	No info	No info	No mention beyond standard governance and QA arrangements	Yes, with archive, plus planning documents

What are the key takeaways from Table 5? In some respects, the sample institutions report similar things in similar ways, but in other respects, there are differences. Many describe similar QA arrangements, and many report student and graduate numbers, as well as financial data. However, few cases suggest consistent tracking of a fixed set of metrics. Financials aside, many annual reports emphasise a different combination of metrics each year, undermining the scope for evaluating progress or change over time.

A recent International Council for Open and Distance Education (ICDE) survey of 53 ODL institutions worldwide drew similar conclusions. In terms of performance assessment, the institutions reported heavy reliance on student completion numbers at the program level, with less attention to the module or course level. Student satisfaction and post-completion employment were cited by a minority (Tait & Gore, 2015). The study did not synthesise the details of institutional tracking, which would no doubt further diversify the approaches taken to notionally common metrics.

In our study, a leader in reporting is Athabasca University, which reports annually against an array of metrics that speak to student access, academic quality, research output, innovation, community and sustainability. Example metrics include:

- Access: Aboriginal student enrolment: three-year average

- Access: Number of students using services for students with disabilities: three-year average

- Access: Value of student awards (i.e., institutional scholarships): three-year average

- Quality: Students, divided by academic level, who have completed six credits in a year

- Quality: Undergraduate course completion rate

- Quality: Number of credentials awarded for a particular cohort

Some metrics are judged against annual targets, whilst others appear to lack a benchmark other than historical performance.

Across the sample institutions there are similar absences, too. There is little reference to student outcomes beyond number and type of graduates. No sample institution appears to report a clear graduation rate — i.e., the proportion of an incoming cohort that graduates within a given time frame. Beyond general statements on the value of a degree, no sample institution offers data on graduate careers or other milestones or personal characteristics. A few institutions profile selected graduates in terms of their post-study career paths, but none appears to track graduate trajectories on a quantitative or comprehensive basis. Annual reports sometimes make passing reference to student dropout rates and efforts to address these, but metrics and tracking are few and far between. There are also considerable differences in how dropouts are defined and measured.

On the available evidence, it is not possible to connect a particular approach to academics or student support with particular student outcomes. No doubt specifics make a difference, but institutional presentation is too high-level and inconsistent to permit such insights or comparisons.

In our sample, references to institutional productivity are also limited. Despite the mandate of ODL institutions to increase access and lower cost, sample universities make few specific claims in this respect. There may be a connection between minimal reporting on student success and scant reference to productivity. The ODL models employed by sample institutions do tend to mean a lower cost per student compared to conventional universities, but if attrition is high, the cost per graduate can be less compelling. UNISA's figures are a case in point; one of its webpages says that UNISA accounts for almost one-third of university students in South Africa[17] and another that UNISA accounts for 12.8 per cent of university *graduates*.[18] Both figures are impressive in themselves, but the gap between them gets to the heart of the contemporary challenge for specialist ODL universities.

Inevitably, all of the sample institutions articulate their "success" by describing particular initiatives said to exemplify mission fulfilment. Annual reports are often lengthy, text-heavy documents. The work described is fascinating and no doubt of high value, but it can be difficult for the reader to put developments in context or judge progress over time. Six of the ten sample institutions publish an annual report, and all six also archive annual reports on their website. Two of the other four institutions — IGNOU and OUSL — do not offer an annual report but do publish major planning documents and the like. OUM's website appears not to feature annual reports, but some historical reports may be found online. The NOUN site appears to feature no accountability or planning documents at all.

Also generally missing is any kind of benchmarking. No sample institution references peer performance, whether individually or collectively, as a marker of success. Some, such as AU and UKOU, refer to provincial or national student satisfaction surveys and describe institutional performance in relation to such benchmarks. Both institutions perform above average. There are only two cases of a sample institution turning to non-national QA. AU has been accredited by the Middle States Commission, one of the regional accrediting agencies in the USA, since 2006. Canada does not have a national accreditation or other QA system, positioning American regional accreditation as a helpful means to emphasise the credibility of AU beyond Alberta and the rest of Canada. USP is pursuing a similar strategy, seeking accreditation from the Western

Association of Schools and Colleges, another American regional accreditor. USP also recently went through a review by the Academic Quality Agency for New Zealand Universities.

The clearest future commitment to performance assessment comes from OUSL. The university's *Strategic Management Plan 2015–2020* (OUSL, 2014) sets out seven goals and 100+ key performance indicators (KPIs). Example KPIs include:

- Goal 1: Ensure High Quality and Relevant Education
    - number of new programmes of study
    - percentage of academics with PhDs
    - number of academics funded for short-term training overseas

- Goal 2: Improve Employable Quality and Career Enhancement of Graduates
    - percentage of graduates with English language proficiency
    - percentage of graduates with soft skills
    - percentage graduate employment in the private sector

Performance against each KPI is projected across the years of the strategic plan, with targets for each year. All KPIs are referenced to historical performance, not external benchmarks. In some cases (e.g., percentage of graduates with soft skills), how the institution will gauge performance is not specified.

To return to the productivity question, is it possible to use institutional reporting of student and staff numbers to estimate relative efficiency? It was noted above that the sample institutions make little or no effort to report such calculations. Insofar as conventional universities often report such numbers, might a comparison be illuminating? One benefit of distance learning is said to be greater operational efficiency compared to a conventional university. Reduced reliance on a physical campus, less direct contact between students and staff, and greater use of student resources tends to lower inputs and permit economies of scale.

Direct proof of superior efficiency is not necessarily straightforward. OUM and OUA, as consortia of public universities, draw on staff from multiple institutions, many of whom have other duties. There appears to be insufficient data on IGNOU and NOUN, and staffing data for USP and UWI do not sufficiently distinguish between distance and non-distance students.

For the four remaining sample institutions — AU, UKOU, UNISA and OUSL — data are available to make a simple comparison. Table 6 lays out student-to-staff ratios, distinguishing academic and non-academic staff for 2013 or 2013/14. These figures and comparisons should be treated with caution, and they highlight the problem of ingrained data inconsistency.

Table 6. Sample Specialist ODL Institutions: Staff and Student Ratios

INSTITUTION	STUDENT HEADCOUNT	ACADEMIC STAFF HEADCOUNT	NON-ACADEMIC STAFF HEADCOUNT	STUDENTS TO ACADEMIC STAFF RATIO	STUDENTS TO NON-ACADEMIC STAFF RATIO
Athabasca University	c. 41,000	218	887	188	46
The Open University	c. 150,000	6,425	3,540	23	42
OU Sri Lanka	c. 38,000	2,395	3,093	16	12
UNISA	c. 350,000	1,978	3,876	177	90

AU and UNISA figures are taken from those universities' annual reports (AU, 2014; UNISA, 2013), UKOU data are taken from the UK's Higher Education Statistics Agency (HESA), and OUSL data come from the university's statistical handbook (OUSL, 2013).

AU and UNISA appear to have a very lean ratio of academic staff to students, compensated by greater numbers on the non-academic side. UKOU has the opposite profile, exhibiting a much lower ratio of students to academic staff and a higher ratio to non-academic staff. At OUSL, both ratios are low and quite similar. The UKOU ratios are higher than the average amongst other UK higher education institutions (11 and 11, respectively). UKOU's ratios may be lower than those of AU and UNISA because a greater proportion of staff are devoted to research rather than to teaching, compared to most ODL institutions.

In Table 6, both student and staff numbers are headcount, not FTE, as the latter figures are often not available. In the case of UNISA, South Africa's Centre for Higher Education Transformation reports a student-to-all-staff ratio for UNISA of 90 for 2012 (based on approximately 170,000 FTE students), compared to a national university range of ten to 50.[19] AU reports an FTE student figure for 2013/14 of 7,800, a fifth of the headcount total of about 41,000. Staff FTE figures are not available. If the staff FTE figure is assumed to be 50 per cent of the headcount, that would lower the student-to-academic-staff ratio to 72 and the non-academic ratio to 18.

At OUSL, all students are said to be full-time, which might explain the low ratios. If one assumes the staff FTE figure to be 50 per cent of the headcount, that raises the institution's student-to-academic-staff ratio to 32 and the non-academic-staff ratio to 24.

Across all four institutions, differing categorisations of particular staff, as well as different operational models, may help account at least partially for the patterns and anomalies in Table 6. Ideally, a more thorough analysis would be undertaken, in consultation with interested institutions, to sort through definitional issues, surface more detailed data, and review developments longitudinally.

Whilst the data are far from perfect, Table 6 does suggest that ODL institutions often embody significant staffing efficiencies relative to conventional universities. In a climate of reduced public resources for higher education and above-inflation tuition hikes in a growing number of countries, the operational advantages of particular ODL institutions are still insufficiently studied and certainly are not widely understood by policy makers and the media. The ODL institutions in our sample could do more to track, analyse and disseminate data on this issue. The "elephant in the room" is student attrition. This matter will be considered again in the final part of this report.

It is worth noting that definition, reporting and transparency issues plague conventional universities, too.

SECTION 3
Examination of Non-specialist and Non-Commonwealth ODL Institutions

This section attempts to place the sample Commonwealth ODL institutions in a broader context. Since any of our Section 1 sample institutions were founded, the number and range of specialist ODL institutions has grown, and there has been a dramatic increase in the number of conventional universities that offer open and distance programmes at some scale. A key question for this report is the extent to which specialist ODL institutions in the Commonwealth remain distinctive in terms of offerings, operational models and ROI.

There are literally hundreds of universities worldwide with significant ODL operations, whether these characterise the institution as a whole or simply a component. However, a sampling of the types of institutions provides an adequate perspective. This report considers the following types and examples of institutions involved with ODL:

- **ODL + For-profit**: University of Phoenix (USA) and Kroton Educacional (Brazil)

- **ODL + MOOCs/OER**: Coursera (USA), edX (USA), FutureLearn (UK), One-Man University (China) and OERu (international)

- **ODL + Competency-based Learning**: Western Governors University (USA) and New Charter University (USA)

- **ODL + Adaptive Learning**: Knewton (USA) and Smart Sparrow (Australia)

- **ODL + Highly Selective Universities**: 2U (USA)

- **Conventional Universities Offering ODL at Scale**: Leicester University (UK), Southern New Hampshire University (USA) and University of Southern Queensland (Australia)

- **Non-Commonwealth ODL Specialist Universities**: Anadolu University (Turkey), Open University of China, Korean National Open University (South Korea) and Open University of Catalonia (Spain)

The list encompasses seven types of ODL activity and 19 different institutional or corporate examples. The three non-institutional companies listed — 2U, Knewton and Smart Sparrow — all work with conventional universities.

In what follows, each example is discussed in turn. A summary of the institution's scale, offerings and outcomes is followed by a judgement as to the relative innovation of the case. Innovation is referenced in terms of the goals of specialist ODL institutions in the Commonwealth: widening access to higher education, lowering the cost of instruction and offering academic quality comparable to conventional universities. In particular, we looked for evidence of institutional "success" that went beyond the norm in the Commonwealth specialist ODL sample.

3.1   ODL + For-profit

All but one of the Commonwealth specialist ODL institutions discussed in Sections 1 and 2 are non-profit (OUA being the exception), and all but two (OUA and OUM) are public; even the latter two exceptions, however, are collectives of public universities. Historically, most countries have had little or no for-profit university presence, and that remains true today. However, in a few markets, notably the USA and Brazil, for-profit university-level institutions have emerged strongly, and most have utilised ODL. Does the profit motive make a positive difference to ODL implementation and success? We explore this with two examples: the University of Phoenix, in the USA, and Kroton Educacional, in Brazil.

- **University of Phoenix (UoP)**. UoP was established in 1976 and secured American regional accreditation — the same standard to which conventional universities are held — in 1978. The vision was to build a university dedicated to working adults, seen as under-served by conventional institutions. Focusing on small, rented classroom facilities convenient for commuters, UoP steadily expanded nationwide. In the 1990s, it embraced online learning, which quickly became the dominant delivery mode. The UoP version of online delivery is centred on asynchronous discussions. At its peak in 2010, UoP enrolled over 450,000 students, primarily in the USA, and became the largest private university in the country. Programmes ranged from associate's degrees to doctoral programmes and spanned many career fields. From the early 2000s onwards, the vast majority of UoP's American students were eligible for federal financial aid, meaning that UoP drew the bulk of its revenue (80–90 per cent) from public funds. The business was highly profitable for many years. UoP priced its programmes between the public and private non-profit norms.

  Even as UoP and other for-profit institutions grew their enrolment, the sector remained controversial, fielding claims about poor quality, high dropout rates and profiteering. From 2011, UoP enrolment began to decline, and it has continued to fall, dropping below 220,000 in 2015. The university has been besieged by a host of factors, including online competition from conventional universities, regulatory scrutiny and growing media disquiet. These challenges are shared by most other American for-profit universities.

  Innovation compared to Commonwealth ODL specialist institutions. Whilst UoP and its peers revealed unmet demand amongst working adults in the USA — despite decades of continuing education and ODL offerings from conventional universities — the sector has thus far largely failed to make its case in terms of academic quality and student outcomes. Disclosure has been patchy, but the available evidence suggests student attrition is high (over 50 per cent), even allowing for a non-traditional population (US Senate Health, Education, Labor and Pensions Committee, 2012). UoP and its peers are a valuable addition to the USA's higher education landscape and have been successful in terms of widening access and optimising operational efficiency, but they have been weak on the quantity and quality of student outcomes. Through its *Academic Annual Report*, UoP pioneered a greater level of outcomes reporting amongst for-profit institutions; notably, however, the last such report was published in 2011. It must be stressed that not all American for-profits resemble UoP. For example, Grand Canyon University has invested in both physical campuses and online facilities and has continued to grow. Capella University pioneered a shift to competency-based learning and enjoys stronger enrolment and a reputation for quality.

- **Kroton Educacional**. Kroton was founded in 1966 and until about a decade ago was a primary and secondary education provider only. At that time, the company entered the post-secondary market through a series of acquisitions. In 2013, Kroton merged with its largest rival, Anhanguera. Kroton operates 130 campuses across Brazil and 725 distance learning centres. All programmes are accredited by Brazil's Ministry of Education. Post-secondary enrolment, under various brands, is now over 1.1 million. In early 2015, about 58 per cent of Kroton's post-secondary students were distance learners, with the vast majority at the undergraduate level. It is important to remember that the majority of post-secondary students in Brazil are enrolled in private institutions, both for-profit and non-profit.

  Like UoP's, Kroton's growth has been driven not only by Brazil's burgeoning middle class, hungry for higher education, but also by federal financial aid, which follows students to the eligible institution of their choice. The federal government recently restricted this aid to better-qualified students, putting many Kroton students' eligibility at risk. The company has responded with a private loan programme, and so far, enrolment remains buoyant (Kroton, 2015). Kroton is less dependent on federal aid than UoP. Kroton's business is highly profitable (net margins of over 30 per cent in recent quarters). The company reports the financial performance of its distance learning operation separately and shows superior margins compared to the on-campus business.

  Innovation compared to Commonwealth ODL specialist institutions. Kroton has achieved an enrolment scale across all delivery modes. Kroton also discloses more operational details and outcomes metrics than our Commonwealth ODL sample. The company clearly reports student dropouts on a quarterly basis (these were about ten per cent of enrolment in the quarter prior to this report's publication) and exhibits above-average scores on the Ministry of Education quality indices. The most recent quarterly report notes that a number of Kroton programmes are ranked either best in the country or in the top ten. Overall graduation data appear not to be available, nor is information on graduate employment. It is still early days for the company, which has been offering post-secondary education for little more than a decade, but it is fair to say that Kroton is ahead of the pack on many fronts, at least amongst proprietary institutions globally.

3.2 ODL + MOOCs

MOOCs (massive open online courses) came to prominence in 2012, first in the USA and then globally. MOOCs are free, online, non-credit courses offered primarily by conventional universities. The first MOOC as such is generally said to have taken place at the University of Manitoba, in Canada, in 2008. Building on prior open courseware initiatives, wherein course materials were made freely available online, MOOCs go one step further to offer an entire course or series of courses. Institutional rationales include providing access to higher education and experimenting with online learning. Courses are largely self-directed: students watch instructor videos, answer questions and complete assignments. Discussion boards permit interaction between students, with occasional faculty input. Some courses are entirely self-paced, whilst others start and end at fixed times. Many of the major MOOC providers are experimenting with ways to grant accreditation to successful students. This is usually in the form of proctored exams, certificates of completion and, rarely, an option for challenge credit (see, for example, the University of Alberta's Dino 101 MOOC[20]).

MOOCs are presented as being high-quality as well as accessible. MOOC providers position their offerings as designed on the basis of "proven teaching methods from top researchers" (Coursera, 2015). Specifics include "mastery learning" (i.e., a hierarchy of automated assessments to ensure the learner masters a step before moving on) and peer assessment, the latter being an efficient way to (i) grade tasks not amenable to automation and (ii) better engage learners. The leading MOOC providers report over ten million course registrations, but completion rates are typically under ten per cent (which says more about the low barriers to entry than about course quality; Perna, 2013). MOOC providers generally do not position their offerings as alternatives to conventional higher education. Indeed, data on MOOC learners to date suggest that most already have a degree (Swope, 2013).

- **EdX**. A joint initiative of MIT (building on its open courseware experience) and Harvard University, edX was the first MOOC provider. The non-profit effort now has almost 40 institutional "charter members" worldwide and a longer list of other members. Institutions involved are typically elite conventional universities. EdX currently offers over 500 courses on a wide range of subjects, mostly in English — but there are plans to expand in other languages. The organisation has stopped actively publicising total course registrations, but the total is in the millions. EdX is largely supported through its participating institutions and foundation money. Students can pay a small fee for an official course completion certificate. The organisation lately started to offer fee-based "professional" courses, which tend to cost a few hundred dollars. The edX platform is open source.

  EdX recently blurred the line between non-credit and for-credit offerings by partnering with Arizona State University (ASU) to offer an inexpensive first year of college: the Global Freshmen Academy. Students will have the option, for up to $200 per credit, to complete their freshman year online. The courses will be open to anyone, worldwide, with no upper limit on enrolment. Total cost is positioned as about half the typical expense at a public four-year university in the USA (but comparable to at a community college). Students will only pay once they have passed a course, reducing their financial risk. Many of the courses have yet to be built, but it appears that the student experience will be similar to that in other edX courses. ASU itself offers a large suite of online degree programmes and enrols over 13,000 wholly online students.

- **Coursera**. Coursera is structured similarly to edX but is for-profit. It has 119 partners and offers over 1,000 free, online, non-credit courses. Like edX, many of its university partners are prestigious institutions in their own country, and they hail from all over the world. Coursera continues to count course registrations, now above 12 million over time. Attempts by Coursera to find a business model include "specialisations" — series of courses with a capstone that cost a few hundred dollars. The company sees a corporate market for specialisations. Coursera recently announced a move into for-credit provision: a USD 20,000 online MBA with the University of Illinois Urbana-Champaign. Coursera course materials, although developed by partnering, public universities, are under the copyright of Coursera rather than being OER.

- **FutureLearn**. As discussed in Section 1, FutureLearn is a MOOC effort that started life at one of the sample Commonwealth ODL specialist institutions discussed in this report: UKOU. The university's OpenLearn effort is the foundation for FutureLearn, which offers an array of free courses and study materials. (It was recently announced that OpenLearn users will be

able, at no cost, to earn "badges" to show achievement.) Like edX and Coursera, FutureLearn now constitutes a network of universities and other organisations, over 50 in all. FutureLearn is a private company wholly owned by UKOU. Since its launch in September 2013, over 1.5 million people have registered for one or more FutureLearn courses, all of which start and end at fixed times.

- **One-Man University**. This start-up from China, launched in 2012, is the brainchild of Tong Zhe, a physics graduate of Peking University and École Normale Supérieure de Paris. Wanting to share his knowledge with others, and conscious that conventional approaches failed to reach most students, he posted a two-hour video, "Zhe's Theoretical Physics Lesson: Entropy and Phase Transition," on a popular video-sharing site. The video's light-hearted delivery and use of real-world examples caught the imagination of a large number of viewers. Zhe added more videos and subjects, then formally started One-Man University — a play on its Chinese name, Wanmen, which means "10,000 doors."

  The site now boasts over 140,000 users. Access is free, and no academic credit is available. Users are said to range from conventional university students to high school students and the general public. Some commentators position One-Man as a critique of the didactic nature of much university education in China, but officially it is no more than a supplement. The site is also seen as a way for Chinese students to get more from the MOOC phenomenon — benefiting from home-grown content rather than struggling with translated foreign courses or having to use English.

  Renren, a leading social network firm in China, has invested in One-Man, enabling the operation to expand staffing and raise production quality. Renren claims to have over 223 million active users.

- **OERu**. OER Universitas (OERu) is a non-profit network of higher education institutions, offering free courses aimed at learners for whom other provision is inaccessible. Supported by the OER Foundation, established in 2009 and hosted at Otago Polytechnic in New Zealand, OERu makes available approximately 25 general interest and higher education MOOC-style courses (i.e., independent study and automated assessment, with some opportunity to interact with other learners online). All courses are built entirely from OER and are expected to grow in number and range.

  A spread of universities and other higher education institutions — both ODL specialists and otherwise — are named as OERu supporters and course providers. Partners include a number of institutions examined in this report, such as UKOU, Open University of Catalonia, Southern New Hampshire University, University of Southern Queensland and AU. There are two levels of membership: gold (USD 5,000 a year — or 4,000 if the institution commits for three years — and 0.2 FTE of staff time); and silver (USD 8,000 a year, no staff commitment). All members must contribute at least two OER courses. Gold members may bid to develop new courses from surplus OERu funds. The institutional network also serves to help learners gain low-cost academic credit for study. Right now, in terms of academic awards, learners may work towards a Diploma in Tertiary Education or a Bachelor of General Studies.

  The OERu website positions institutional involvement as philanthropic and the business model as cost recovery. It is expected that some learners will transfer into conventional programmes at partner institutions. The Hewlett Foundation, long a supporter of OER

efforts, is a major contributor to the OER Foundation. UNESCO is a key co-ordinating partner in the effort. At present, there appears to be no information about learner volume, characteristics or pursuit of credit at OERu.

Innovation compared to Commonwealth ODL specialist institutions. By offering individual courses rather than degrees, and not offering academic credit, MOOC providers have side-stepped many of the operational challenges faced by ODL specialist institutions in the Commonwealth. The ability to offer courses without charge reflects both multi-institutional and foundation subsidy and the availability of low-cost, on-demand course provision online. A pedagogy centred on high-quality video and automated assessment is a challenge for most Commonwealth ODL specialist institutions, where any online learning is dominated by text-based discussions. It is premature to conclude that one approach is superior, but it is reasonable to surmise that the former is more intuitively engaging for the average learner. The resources behind edX suggest scope for step-change enhancements in the online student experience, such as mainstreaming simulations and having game-based offerings.

The search for a business model is pushing MOOC providers into offering fee-based courses and charging for academic credit. The move into series of courses reduces the gap between the MOOC course and a conventional degree. It is too early to say whether payment and/ or academic credit will enable providers to drive course completion rates into respectable territory. As time goes on, it will be interesting to see how these innovations perform and what metrics they disclose. For participating institutions, the value of MOOCs is less the promise of significant revenue and more the opportunity to experiment with online learning to the benefit of conventional students. The long-term impact of MOOCs may be to strengthen the online learning capabilities of elite universities, increase public brand awareness and enhance social contribution, but it is unlikely those institutions will want to dramatically expand degree enrolment. However, lessons from MOOCs may enable other kinds of universities or other entities to do so. It is also unclear whether the availability of MOOCs reduces interest in degree-centric ODL institutions. Unless and until many employers start to hire based on collections of MOOC courses, regardless of whether the candidate has a degree, this is unlikely at any scale.

OERu lacks the brand recognition and resources of the likes of edX and Coursera, and it is little known by comparison. In terms of volume and quality of offerings, OERu may find it hard to compete. Insofar as the major MOOC providers are moving to offer routes to academic credit, OERu may need a clearer differentiator.

3.3   ODL + Competency-based Learning

Competency-based learning seeks to articulate what a student in a particular course is supposed to know or be able to do, to a greater level of specificity than is common in a conventional university. Advocates of competency argue that the approach distinguishes graduates who are more capable and helps align them with employer needs. Competency models tend to use a pass–fail assessment system rather than grades, emphasising mastery. Competency pre-dates online learning and historically was often not associated with distance learning at all, but there are examples where the two are combined.

- **Western Governors University (WGU)**. WGU was founded in 1997 by a group of governors from the western part of the USA. The vision was a new kind of university that would help states grow the number of residents with degrees, create graduates who were workforce ready and minimise cost to the public purse. WGU is a private, non-profit institution and regionally accredited in the USA. It offers undergraduate and graduate degree programmes in career fields and today enrols over 55,000 students, mostly in the USA and over the age of 25. Study is wholly online and self-paced. Students pay in six-month increments rather than by course attempted or completed, so degree completion can be very affordable. The typical fee per six months is USD 3,000. There is a strong emphasis on demonstration of prior learning for academic credit, and on utilisation of third-party course materials and assessments to enable each student to work towards competency. Each student liaises with a mentor to build a "personal degree plan" and with other students through online discussions. Students are eligible for federal financial aid.

  In recent years, WGU has been invited to come into certain American states (e.g., Indiana and Texas) to add non-traditional capacity. Arrangements vary, but generally, English-speaking state residents study at WGU at discounted rates or are eligible for state support.

- **New Charter University**. New Charter was founded in 2011 from the shell of a former for-profit university. The company has since acquired a former non-profit institution as well — Patten University, in California. New Charter is for-profit and 100 per cent online. Both universities are accredited in the USA. New Charter's leadership comes out of WGU, and the vision is to offer a similar competency model but at a lower price. New Charter does not participate in American federal financial aid, partly because of its non-traditional approach and partly due to very low pricing. Tuition starts at USD 199 a month, regardless of the number of courses attempted. New Charter is also pursuing alliances with local governments to offer employees access to inexpensive degrees, paid through tuition assistance funds.

Innovation compared to Commonwealth ODL specialist institutions. Competency-based education appears highly rational but is not new. The ultimate value of a competency approach often seems too indistinct from alternatives or too time-consuming to implement. There is presently a mini-boom in competency-based approaches amongst conventional American universities — seeking to stand out in a crowded online market, appeal to employers and reduce cost/time — but it is too soon to judge the long-term impact. For most of its history, WGU was the only competency-based ODL university in the USA (and perhaps the world).

Another reason for recent American interest may be the growing amount of outcomes information that WGU discloses. This includes an annual employer survey, which compares WGU graduates favourably to those from other institutions, and a survey that found WGU graduates to be more engaged at work than the national average. WGU students take part in the National Survey of Student Engagement — in which hundreds of American universities participate — and report above-average performance in areas such as time spent per week studying and quality of interactions with faculty. WGU graduates report an average income increase of USD 10,400 in the first one to three years after graduation, significantly higher than the national average of USD 6,400. (This may reflect WGU's older student profile.) WGU's current 13-month retention rate — the percentage of students who return after their first year — is 79 per cent, above the average for American public colleges and universities (73 per cent).[21] WGU is a

leader in the disclosure of student outcomes data, and results suggest that the institution's value proposition is compelling.

3.4   ODL + Adaptive Learning

"Adaptive learning" refers to automated assessment designed to present each student the right content at the right time. "Right" is couched in terms of a dynamic student model that uses the student's prior knowledge, preferences and actions, which are captured and fed into an algorithm. The goal is mass customisation rather than the "one-size-fits-all" approach characteristic of conventional and ODL programming. The system is attempting to mimic the presence of a live faculty member at the shoulder of every student. Faculty and students can track their progress using online analytics. Faculty can better see what works in existing course material, either generally or for particular students, and adapt accordingly. To date, adaptive learning has largely been used in conventional classrooms rather than online, but this is primarily because the former represents a larger market. In classrooms that use adaptive learning software, faculty may observe whilst students use the technology, then respond to individual difficulties as they arise. In other cases, a "flipped classroom" approach may be used, wherein students work with adaptive learning software out of class, and class time is reserved for in-person problem solving with faculty.

Adaptive learning works best in highly quantitative fields like math and sciences, where answers are clear-cut and can be parsed by machines. To date, no university embodies adaptive learning, but a number of specialist vendors are pushing the technology, and some conventional universities are experimenting with it.

- **Knewton**. The company was founded in 2008 in the USA and has emerged as the most prominent adaptive learning firm. One of Knewton's first partners was Arizona State University, which adopted the technology to drive a developmental math course. The pass rate climbed from 67 per cent to 78 per cent, and the withdrawal rate fell from 18 per cent to seven per cent. Nearly half the students finished the course four weeks early. Other universities and colleges have reported similar results.[22] Knewton has also teamed up with major publishers, such as Pearson, to integrate the technology into broader course materials and study aids. Knewton is receiving worldwide attention and claims to be running trials in 19 countries.

- **Smart Sparrow**. This Australian company, founded in 2011, offers a similar product to Knewton but with more emphasis on adoption and customisation by individual faculty, rather than the bundled approach exemplified by Knewton (although Knewton now promotes a beta free tool for individual faculty). Smart Sparrow stresses ease of use and straightforward learning management system (LMS) integration. Pricing for individual faculty starts at AUD 39 a month for one author licence and up to 30 students. Up to 200 students and three licences cost AUD 199 a month. Institutional pricing is determined case by case. The company website features numerous short case studies of individual faculty adoption but seemingly no student performance data.

Innovation compared to Commonwealth ODL specialist institutions. No sample Commonwealth ODL specialist institution currently makes use of adaptive learning (or at least, none mentions such activity on its website). The approach assumes a broadband environment beyond the present capacity of most ODL institutions and their students in the developing world.

The promise of adaptive learning is to "mass produce" an individualised student experience at a low cost per student, which is akin to the big goals of ODL. Insofar as adaptive learning represents an advance over standard forms of student-to-materials interaction, it could prove a major innovation.

What is not yet clear about adaptive learning is whether it is somehow of equal value to all students or a better fit for some than others. Will some students struggle in a machine-centric study environment, however sophisticated the software or computer-literate the learner? To what extent should adaptive learning be used to complement rather than replace other approaches? As trials by the likes of Knewton and Smart Sparrow mature, the resulting datasets will help address such questions.

3.5   ODL + Highly Selective Universities

To a large extent, ODL in higher education has been formulated as distinct from highly selective conventional universities. Whereas highly selective universities are relatively small, expensive and hard to get into, ODL institutions are large, inexpensive and open access. Whilst many highly selective universities have experimented with forms of ODL over time, for most it has been no more than a marginal activity. In the view of most leaders and faculty at such institutions until recently, distance learning could not compare to the on-campus experience.

Online learning changed the conversation. By permitting richer interaction, repeatable simulation, and connections with far-flung experts and perspectives, online began to turn what used to seem like drawbacks of ODL into potential advantages. Motivations have been mixed. Highly selective institutions have no interest in lowering admissions criteria, but some are attracted to the power of an online programme to reach larger numbers of qualified students.

- **2U**. One U.S. company saw this opportunity. First called 2Tor, founded in 2009, the firm asked, "What if online learning was great?" The implication was that up to then, online had been associated with low-prestige institutions and non-traditional students. The emphasis had been on convenience, and the technology had been practical rather than compelling. Starting with a teacher-preparation master's degree from the University of Southern California, a leading private institution, the firm built a custom LMS and leveraged newly mature online video to create a distinctive offering.

    The student experience consists of pre-made instructor videos, synchronous video conferencing between faculty and students, text-based materials and text-based discussions. The approach attempts to replicate valuable features of a conventional classroom — e.g., live interaction, small group discussion — but to add elements not possible in that format, such as archived discussions and access to remote perspectives. As a professional programme that prepares students for licensure, the degree also includes field experiences, which students capture through video and then reflect on with their online peers. Small classes are emphasised, and a commitment to a 15:1 student-to-faculty ratio is often cited. This master's programme quickly grew to over 1,000 students, ten times the size of the conventional class. Tuition for the online programme is in line with that of the conventional one: USD 51,000 for 2014/15.

2U now partners with a growing number of other highly selective universities, public and private, including the University of North Carolina, Chapel Hill, on an MBA programme and the University of California, Berkeley, on a Master of Information and Data Science. The company recently announced a partnership with Yale's School of Medicine for a physician assistant degree. 2U now reports over 13,000 online students.[23] A foray into undergraduate education — forming a network of highly selective universities offering a "semester online" to enable (i) colleges to share courses and (ii) students to take an online class whilst studying abroad or doing an internship — collapsed amid faculty disquiet about the vendor relationship. 2U is now partnering with Simmons College to offer its first bachelor's degree, an RN-to-BSN for registered nurses.

2U contracts with universities on a revenue-sharing basis. The company covers all upfront programme investment and then takes a share of tuition money. The ratio is not disclosed and may vary by programme or institution but is likely to be at least 50 per cent in the company's favour. 2U is now publicly traded and has yet to make a profit, although it is closing in on that goal.

Innovation compared to Commonwealth ODL specialist institutions. The big achievement of 2U has been to make online learning a compelling rather than simply convenient experience. High production values, significant investment (millions of dollars per programme) and an attempt to combine the "best" of classroom and online learning has made the difference. 2U has uncovered a market for high-end distance learning and has achieved consumer recognition that forms of online study can actually surpass the classroom norm. Clearly, the 2U model holds little relevance for ODL institutions serving non-traditional students, most of whom could not afford the price tag. However, it may offer lessons in terms of how to make the ODL experience more engaging to both attract and retain more students.

3.6 Conventional Universities Offering ODL at Scale

Conventional universities have always played a role in ODL, but few have truly scaled enrolment or come to regard ODL as a core business. In contrast, specialist ODL institutions essentially start from this premise. Online learning has persuaded a growing number of conventional universities to take a fresh look. In much of the developed world, the majority of universities now offer at least a small suite of online degree programmes, with an emphasis at the graduate level. Here are three examples that have scaled up ODL even further.

- **University of Leicester**. This public, research-intensive university bills itself as "one of the biggest suppliers of higher education distance courses in the UK."[24] The university has made a concerted play in ODL since the late 1980s. Leicester today offers about 70 distance learning degrees across a wide range of fields, and in 2012/13 enrolled 7,748 distance students — about a third of total university enrolment (University of Leicester, 2013, p. 35). Most distance degrees are master's or post-graduate certificate programmes.

  Delivery mode ranges from primarily paper-based with online support to wholly online. Online study is centred on Blackboard, the university's LMS, and appears to be dominated by text-based student materials and text-based online discussions. Final examinations are conducted in person at various sites worldwide. The university makes a point of saying that a graduate's degree certificate will not say "distance learning," emphasising comparability

between delivery modes. Tuition is the same regardless of the student's place of domicile. That said, tuition for the distance programmes is somewhat higher than tuition for the campus equivalent for UK students but considerably cheaper for international students. Leicester is also involved in FutureLearn, the MOOC provider discussed elsewhere in this report.

Leicester is an interesting case where distance enrolment is actually in decline. It peaked in 2009/10 at 8,651 and constituted 38 per cent of all students (University of Leicester, 2010, p. 39) but has declined over the past three years. The drop is likely due to increased competition and undifferentiated pedagogy. It is notable that Leicester does not report distance graduate numbers or a distance graduation rate. It also provides no information about the life and career trajectories of distance graduates.

- **University of Southern Queensland (USQ)**. USQ, in Australia, was founded initially as a campus of the Queensland Institute of Technology in 1967 and embarked on ODL in the 1970s. Distance learning became the dominant delivery mode in the 1980s, and USQ began to enrol distance learners internationally. Today, about 73 per cent of approximately 28,000 students study at a distance, and a further 15 per cent study in a blended format. The remainder study at a physical campus. These ratios have held steady in recent years, with a slight trend in favour of blended. The bulk of distance enrolment is now online. The university reports market share, claiming about ten per cent of the domestic distance market and 39 per cent of international distance students enrolled in Australian universities (about 2,700 USQ students). Both ratios have declined in recent years — even as overall enrolment has grown — as other Australian universities ramp up distance learning.[25] Only about ten per cent of international distance learners at USQ study independently as opposed to through a local partner.

  The USQ website does not go into great detail about the online learning experience, but it appears to be similar to that of the University of Leicester and most other providers — i.e., heavily reliant on text-based materials and text-based online discussions. Tuition fees are uniform by delivery mode for domestic students, but distance learning is almost 20 per cent cheaper for international students (compared to fees for international students on campus).

  USQ annual reports reference student satisfaction rates on a national survey, as well as an annual retention rate and course-to-course progression rate. All these metrics are shown with historical data. The university does not report a graduation rate. USQ is the only institution in this study to report graduate employment outcomes — at least in terms of the proportion of recent graduates either studying full-time, in employment or looking for work, plus median starting salary. None of these performance data are broken out by delivery mode, but distance learning represents the majority. USQ cites its participation in an international benchmarking exercise organised by the Australasian Council on Open, Distance and e-Learning (ACODE).

- **University of Southern New Hampshire (SNHU)**. This American, regionally accredited university is a relative newcomer to distance learning. Originally a business college, the private non-profit institution only gained its university title in 2001. It then embarked on a two-pronged strategy: to develop a traditional residential programme and to expand online. Today, SNHU has over 3,000 campus-based students and perhaps over 40,000 online;

official figures are too old to capture ongoing rapid growth. The university offers over 200 undergraduate and graduate online degree programmes.

SNHU's online pedagogy is portrayed in a manner very similar to that of the University of Leicester and USQ, so that is not what makes SNHU Online distinctive. Whilst many American non-profit universities have invested in online programmes over the past decade, SNHU has committed to enrolment scale and devoted significant resources to marketing and recruitment. One reason that American for-profit universities, such as the University of Phoenix, grew their online enrolment so quickly was marketing dollars. Many for-profits would devote 25–35 per cent of their revenue to marketing, compared to single digits at a conventional university. SNHU does not disclose marketing spend ratios but has acknowledged that the volume is significant. The institution, barely known outside New Hampshire, embarked on a major national advertising campaign and has become one of the fastest-growing American universities. SNHU Online stresses affordability: online undergraduate degrees are priced at USD 320 per credit hour — less expensive than most private universities in the USA — and online graduate programmes at USD 627 per credit hour. At present, SNHU appears to offer no student performance data.

Not content with conventional online programming, SNHU is also pioneering a form of competency-based delivery. The "College for America" (CfA) brand offers associate's degrees based on competencies, and it targets low-wage employees of large corporations. The rationale is that there are large numbers of Americans who desire a college education but either cannot afford one or are wary of conventional online degrees. CfA partners with employers to tailor curricula and subsidise cost, positioning participation as a way to develop and retain high-value staff. Like Western Governors University and New Charter University, CfA charges by time, not courses attempted, promoting a year of study for just USD 2,500. SNHU received special dispensation from the U.S. Department of Education to offer federal financial aid for CfA students (required because CfA does not employ credit hours, the standard building block of American higher education). CfA now also offers a bachelor's degree.

Innovation compared to Commonwealth ODL specialist institutions. At present, none of the three institutions profiled here — University of Leicester, USQ and SNHU — is typical amongst conventional universities in terms of ODL scale and significance. All three are pioneers at different stages of development but facing an uncertain future. For the University of Leicester, distance learning has proven a valuable source of revenue and diversification, but the institution risks losing its prime-mover advantage as other universities invest in ODL. For USQ, distance learning has long been the core business, and it most resembles the Commonwealth ODL specialists in our sample. It flourished in the absence of a dedicated ODL university in Australia but now faces competition from the OUA collective and the rest of the sector. SNHU saw an opportunity to combine a non-profit brand with for-profit marketing and execution to sidestep the competition. The CfA initiative is a sign that the university recognises that its current version of online programming, and its online enrolment lead, will not be sustainable forever.

It is notable that all three of these institutions employ very standard online pedagogy. All three claim their approach to be distinctive when it is, in fact, commonplace. Declining distance enrolment at Leicester, declining market share at USQ and the pre-emptive strike in the form of CfA at SNHU all point to the need for innovation, in terms of the online student experience

and the tracking of student performance. USQ is a leader in performance data reporting, but key questions remain unanswered, and benchmarks are still conspicuous by their absence.

3.7   Non-Commonwealth ODL Specialist Universities

The final group of benchmark institution are ODL specialists outside the Commonwealth. A number of institutions might have been chosen for this section, but these four combine geographical and operational breadth. Not surprisingly, ODL institutions outside the Commonwealth often bear a close resemblance to those inside in terms of target audience, founding principles and operations. The following commentary offers a brief summary of each institution and looks for evidence of delivery mode or performance innovation. In some cases, pertinent information may only be available in languages other than English.

- **Anadolu University**. This mixed-mode Turkish university, founded in 1958, embarked on "open education" in 1982 with a unique government mandate. The university claims to have over one million distance students, at primarily the undergraduate level and across every conceivable field, alongside a much smaller number studying at physical campuses (approximately 25,000). Anadolu enrolment was at approximately 600,000 in the mid-1990s (Daniel, 1996, p. 191) and has grown strongly over the past decade (Koksal, 2014). The delivery mode is primarily print- and TV-based, with a growing role for online learning. The university operates a nationwide network of study centres for distance learners.

  Turkey's higher education system is unusually distance-centric. The Council of Higher Education states that 39 per cent of the country's 5.5 million higher education students in 2013/14 were studying via distance learning, primarily in "open education" facilities dominated by the likes of Anadolu (Council of Higher Education, 2014, p. 16). This suggests that Turkey has about 2.1 million distance students, with about half enrolled at Anadolu alone. Other sources suggest that the distance ratio has recently declined sharply following the opening of a large number of public and private universities. Unlike ODL institutions in the developed world, many open education students in Turkey are aged under 25, and they are said to be deserting open education for a more conventional campus experience (Koksal, 2014, p. 14–17). This points to both limited traditional higher education capacity in Turkey historically and distance education as a "bridge" rather than a wholesale solution. Over time, Turkey may develop a larger non-traditional student market, for which a physical campus may be impractical regardless of preference.

  Anadolu appears to offer no student performance information or reporting of institutional productivity relative to conventional institutions. A recent self-evaluation under the auspices of the European University Association (along with the university's 2014–2018 institutional plan) emphasises, amongst other things, the need to continue to migrate course materials online, increase external programme review, develop the standing of "open education" within the institution and increase outreach to open-education alumni (Anadolu University, 2014). An independent study, noting the "very limited" state of the literature on distance education in Turkey, undertook a statistical analysis of wage data by prior education and delivery mode and found distance graduates to be at a disadvantage (Koksal, 2014, p. 32).

- **Open University of China (OUC)**. Formerly the China Central Radio and TV University, OUC was founded in 1979 by the Ministry of Education and evolved into a vast network of

branches nationwide. Provincial branches of OUC have established fully fledged "colleges" to enhance the facilities available to local students, in line with the system's unusually strong emphasis on group study by "distance" students at local centres. Some of these branches, such as Shanghai Open University and Beijing Open University, are now autonomous institutions. The institution claims to have 3.6 million active students — a number that has increased strongly over time. The majority are "junior college" students (below the undergraduate level), alongside about one million undergraduates. OUC is gradually moving away from its broadcast heritage to a model of independent online study supplemented by face-to-face support at local centres. A recently completed system permits video conferencing between students and staff, centred on local sites.

OUC is positioned as a key part of China's education reform strategy, complementing dramatic enrolment growth at conventional universities that have a lifelong learning agenda. There is a growing network of alliances with conventional universities, designed to add faculty talent and aid QA. Cities and corporations are also listed as partners.

Graduate numbers are reported by field, but little other student performance or institutional productivity data appear to be available.

- **Korea National Open University (KNOU)**. KNOU was founded in 1972 as a junior college branch of Seoul National University, becoming independent in 1982. Today, the university offers an array of bachelor's degrees, plus some graduate programmes, across a wide range of disciplines. It has 46 campuses and branches nationwide, along with a cable TV channel. Delivery mode is a mix of print, broadcast and wholly online, including mobile. Somewhat similar to OUC, all KNOU students must attend at least four in-person classes per semester to build relationships with faculty and advance their studies (KNOU, 2014, p. 10).

In 2014, KNOU enrolled about 142,000 undergraduates, 2,000 graduates and 6,000 students in non-degree programmes. The overall total of about 150,000 appears to be down from over 200,000 in the 1990s (Daniel, 1996, p. 180). This may reflect the rise of online learning alternatives across local higher education, as well as a rapidly ageing population. There is a new emphasis on graduate education, with the launch of a graduate school and MBA program. Continuing education, re-branded "prime college," is pushing everything from employability skills training for high school students to "second life" education for older citizens.

Aside from graduate numbers, there is no sign of other student or institutional performance data.

- **Open University of Catalonia (UOC)**. This public university was founded in 1995 in the Catalonia region of Spain and claims to be the world's first university wholly born online. The language of instruction began as Catalan, with some Spanish and English added over time. UOC's portfolio consists of about 50 degrees — undergraduate, master's and doctoral. Many of the programmes are quite specialised, such as food systems, conflict management and Islamic banking, but these are alongside more general offerings, such as international business and psychology.

The online student experience is similar to that in other online programmes: a standard LMS platform offering text-based study materials, and text-based discussion supplemented by various multimedia resources and online communication tools.

In 2013/14, UOC enrolled 52,513 students. About 50 per cent were bachelor's students and about 16 per cent master's. Non-degree and language students made up the rest. The bulk of students were over the age of 25, with a small female majority. UOC has a longstanding presence in Latin America, but there appears to be no enrolment breakdown by geography. The 2012/13 academic year saw UOC's first ever enrolment decline, followed by a further small decline the following year (UOC, 2014, p. 17). The latest annual report does not comment directly on reasons for the decline but implies that the ongoing "financial crisis" in Spain and much of Europe is to blame. Despite the enrolment shortfall and pressure on public funding, UOC maintained a healthy surplus in 2013/14.

Innovation compared to Commonwealth ODL specialist institutions. Whilst only four non-Commonwealth ODL specialist universities were considered, two findings are particularly interesting.

First, three of the institutions (Anadolu, OUC and KNOU) are in the midst of ongoing adaption to online learning, the fourth (UOC) exhibits a standard online delivery model, and none have put forward atypical student performance or institutional productivity information. Second, three of the four cite either recent enrolment decline (KNOU and UOC) or loss of market share in favour of traditional providers (Anadolu). These four non-Commonwealth ODL universities have all achieved a great deal over time and remain unique in terms of scale and scope in a local context. Yet on balance, rather than being beacons of innovation, these institutions are grappling with the same maturity challenges as the Commonwealth ODL sample institutions.

This section has reviewed a sample of non-Commonwealth ODL specialist institutions and non-specialists active in ODL. The aim is to emphasize the range of models and settings in contemporary ODL that both point to ways Commonwealth ODL specialists might innovate and serve as a reminder of the mainstreaming of ODL. Mainstreaming vindicates ODL pioneers but poses new questions of remit, niche and contribution. If conventional universities now offer ODL as routine, what is the role of specialist institutions? Are specialists now yesterday's innovators, embodying calcified ideas that must be pushed aside? How might ODL specialists draw strength from their unique legacy and move forward? The final section considers these questions.

Conclusions

ODL institutions were formed to address the access, cost and efficiency limitations of conventional universities. Decades after many such institutions were established, it is appropriate to review progress against these founding ideals. This report has considered the characteristics and trajectories of ten Commonwealth specialist ODL institutions, with a particular focus on student performance and institutional productivity data. As points of comparison, the study also took into account 18 other ODL institutions or companies, in the Commonwealth and beyond.

The study has reached three main conclusions:

1. **Mixed Enrolment Patterns**. Whilst all the mature ODL institutions considered, Commonwealth or otherwise, embody great achievement over time and are unique in scale and scope in local settings, the recent enrolment picture is very mixed. Although about half of the sample institutions have continued to grow strongly in recent years, the other half have suffered recent enrolment decline or loss of market share, along with financial difficulty in some cases. Each institution is different, but these trajectories speak to the mainstreaming of forms of ODL, particularly online learning, across conventional universities.

   Figure 1 summarises recent enrolment trends for the ten Commonwealth ODL sample institutions and for nine of the non-Commonwealth institutions. The remaining non-Commonwealth cases examined either are companies rather than institutions, or are quite new and have yet to report enrolment, or are first and foremost non-degree, course-level providers (e.g., the MOOC operators).
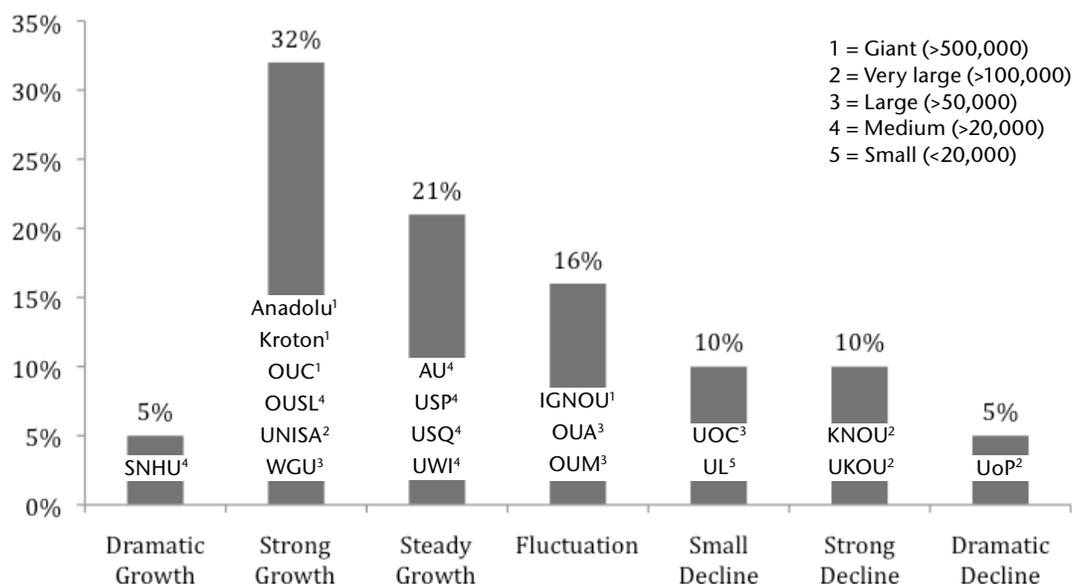

Figure 1. Mixed recent enrolment at 19 sample ODL institutions.

The range of institutions in Figure 1, and the inevitably limited sample, caution against sweeping conclusions. Indeed, there are many, often localised, reasons for particular growth paths. But if one adds instances of growth alongside recent deficit (e.g., Athabasca, USP) or growth alongside loss of market share (e.g., Anadolu, USQ), plus the swelling number of conventional university players, the ODL space appears very dynamic. This report argues that one factor is limited performance data.

2. **Limited Performance Data**. Despite often decades of experience, many mature ODL institutions sustain a mixed reputation for academic quality, and none in the sample squarely reports on student performance. No sample institution provides a graduation rate or makes detailed comparisons with conventional universities. Whilst the implication is not explicit, this absence suggests that student attrition is typically quite high,[26] and delivery mode innovations to date — online learning included — have not yet had a substantial impact at the institutional level. The literature is quite consistent as to what learner, instructor and other factors foster strong retention (Maathius-Smith et al., 2010). The difficulty is consistent implementation, given the host of variables at play in any specific case.[27]

Of course, there are good reasons why ODL institutions do not report "simple" student performance data, such as a graduation rate. The "open" nature of these institutions means that some students may enrol quite casually, may be interested in completing just a course or two rather than a degree, or may transfer to a conventional institution. Another issue is that some ODL institutions encourage significant credit transfer, which complicates graduation rates. If one student enters with half the credits towards a degree but another enters with none, how should the two be compared in terms of time to completion, or attrition? What counts as a student dropout is far from universal. Some institutions allow a post-enrolment grace period to sift out uncommitted students or those who change their minds, and do not count students as formally enrolled until after that point. Differing practices must be understood before a true cross-institutional comparison can be made.

These are thorny issues but not insurmountable. If conventional "graduation rate" metrics are often inappropriate, the onus is on ODL institutions to put forward alternatives. Standard entry questions about student intention (e.g., take one course, take a set of courses, pursue a degree) and motivation (e.g., reflection time taken prior to enrolment) would help make sense of subsequent retention and attrition, as would a control for entry qualifications and incoming credit. Such questions might be posed annually to capture shifting student circumstances and goals. Similarly, standard exit questions would sort out "positive" attrition, such as transfer, from "negative" or ambiguous (e.g., stop-out with intention to return). ODL institutions champion innovation on access and delivery. The same innovation is needed to define and report outcomes.

The recent ICDE report on how ODL institutions support student success highlighted the tension between routine data collection and subsequent co-ordination and dissemination. Reviewing data from 53 ODL institutions, the authors concluded that "institutions collect a range of data upon entry to their university, however it is not fully disseminated or acted upon by all members of staff to improve student success" (Tait & Gore, 2015, p. 5).

Similarly, institutional productivity data, distinguishing ODL models versus conventional ones, are not used by institutions in promotional activity or accountability documents in the

public domain. The available evidence points to significant efficiency gains from ODL. The challenge appears to be that efficiency gains are undermined by weak productivity in terms of student performance and throughput, however those are defined.

Figure 2 presents a typology of performance data reporting across 20 Commonwealth and non-Commonwealth institutions.
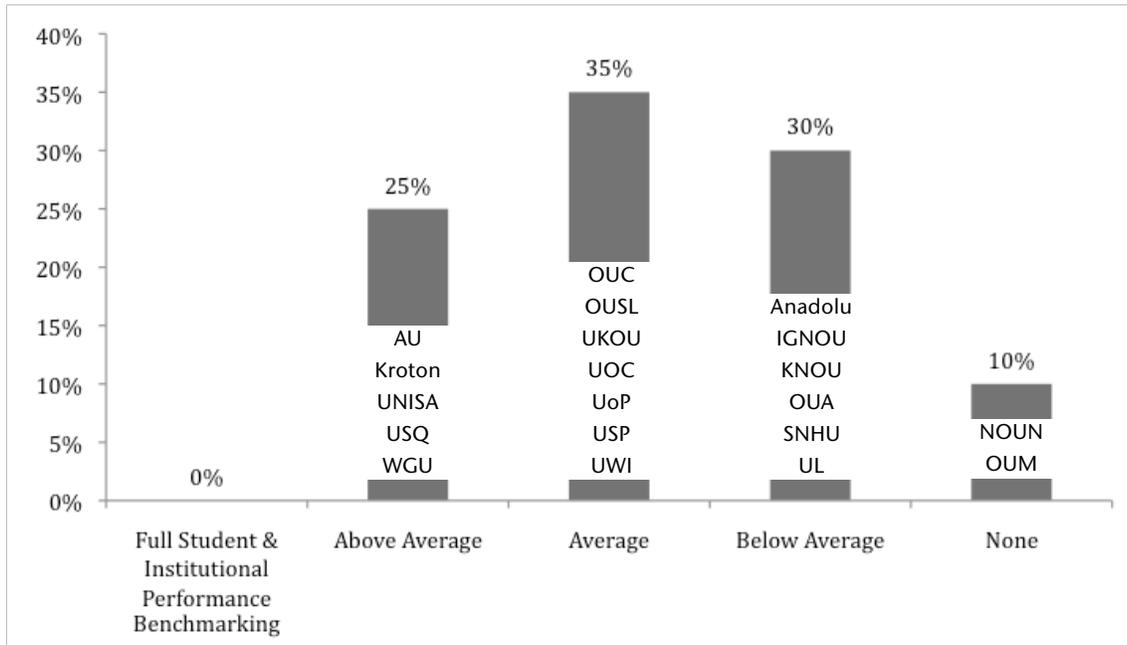

Figure 2. Performance reporting by 20 sample ODL institutions, relative to "ideal" and sample average.

ODL specialist institutions have established themselves as valued and distinctive members of their respective higher education systems and continue to afford much-needed capacity, but they are too often mute or unconvincing on the matter of outcomes. The "big data" that ODL institutions represent are far from optimised in terms of what are collected and how they are used.[28] There is no question that ODL institutions graduate large numbers of high-quality students who greatly value the experience, but that is not the same as demonstrating relative performance and productivity at the institutional and system levels. The same charge could be levelled at most traditional universities, but the burden of proof is on the innovators. Occasional academic studies speak to aspects of distance learning outcomes,[29] but such intelligence is rarely cited by ODL institutions themselves in terms of their own positioning and accountability.

3. **Limitations and Potential of ODL**. This report argues that there is a tension between the typical ODL student experience and the capabilities, situations and preferences of many ODL students. ODL institutions either serve non-traditional students for whom the conventional university is impractical or address a traditional campus capacity gap for traditional-age students. By definition, the typical ODL student experience — wherein the student ultimately has limited contact with faculty and other students — requires greater dedication and self-discipline than what is expected from a conventional student, and it is certainly less familiar.

The model works well for some students, who come to prefer it, but is an often vexing challenge for many others. The circumstances and backgrounds of many ODL students, particularly at the undergraduate level, can render the delivery mode as much a hurdle as an enabler unless expertly handled. In any large, decentralised institution with significant faculty autonomy, the gap between the theory of ODL pedagogy[30] and the reality at the individual course level can be large and uneven.

Of course, the conventional university experience is a struggle for many students. The point is that legacy ODL — conventional online learning included — succeeds in accessibility and convenience much more than in experience and outcomes. This reality constrains the power and potential of specialist ODL institutions. These institutions also have yet to make a convincing case for the pedagogical merits of scale.

The examples of next-stage ODL innovation considered in this report — such as adaptive learning, MOOCs, competency and "high-end" online learning — speak to some of the experiential challenges of legacy ODL. But it is striking that in many cases, these innovations are targeted at or led by conventional universities rather than being pursued by ODL specialist institutions. The mainstreaming of ODL, into conventional universities at scale, is a sign of success for the modality but signals a new dynamic for specialist institutions.

For all these innovations, it is premature to judge long-term impacts. Much innovation is confined to small-scale trials or circumvents the complexities of degree-centric provision. In the case of edX and Coursera, supported by venture capital and operating a top-brand/open-admission/no-fee model, enrolment is easy but ultimate value to the learner still vague. The 2U approach may be impractical for the typical ODL institution or student but nonetheless may say something important about what works pedagogically. There is no doubt that these next-generation innovations point in the right direction, in terms of more engaging content, higher production values, strategic automation and more carefully delineated student capabilities. But there is, as yet, no neat adoption roadmap whereby any combination ensures wide access, low cost, high quality and compelling productivity.

Specialist ODL universities, in the Commonwealth and worldwide, are one of the marvels of modern higher education, challenging long-held assumptions and offering a ladder of opportunity to millions. In 2015, as mature providers and amid new competition from both conventional universities and start-ups, specialist ODL universities offer many lessons but need to speak more directly to their strengths and the new reality. Conventional higher education the world over continues to be beset by access, cost and productivity challenges. There has never been a greater need for innovative institutions. ODL specialist universities should call out their founding ideals but more explicitly evaluate their progress. Immense benefit would come from constructive tracking and disclosure of key student and institutional performance metrics, as well as diagnosis of what moves the needle. The tide is turning in favour of niche ODL solutions that will be difficult to mainstream, and ODL adoption by conventional universities that fragments innovation and inhibits economies of scale.

The Commonwealth of Learning is well placed to facilitate this dialogue and take action. COL embodies the trust and expertise to co-ordinate systematic data collection amongst willing ODL specialists and others, in the Commonwealth and beyond. Such a dataset might focus on:

- student outcomes by cohort (where appropriate), student intention, incoming credit and various demographics;

- institutional efficiency — e.g., production and delivery costs, distinguished by delivery mode;

- institutional productivity — e.g., cost per graduate (or other defined outcome) versus cost per student; and

- comparisons with conventional universities at the national level.

It will be imperative for COL and participating institutions to find the right balance between private benchmarking and public disclosure. Benchmarking should advance collective good practice and aid understanding amongst "outsiders" (policy makers, students, the media) but not at the expense of individual institutional standing or viability.

To build on this report and explore the issues raised, COL might consider a dedicated conference and follow-up report.

To push the conversation beyond the Commonwealth, COL might partner in this effort with other international ODL agencies, such as the ICDE, or global organisations with a strong interest in higher education and innovation, such as UNESCO and OECD.

Specialist ODL institutions have achieved so much over the past few decades. As demand for higher education surges worldwide, the ODL vision of accessible, low-cost, high-quality provision has never been more relevant. Renewed determination amongst specialist ODL institutions to benchmark student performance and institutional productivity, with fresh inspiration from new competition and delivery models, will take this precious legacy to new heights.

Enrolment Trends at Selected Commonwealth and Non-Commonwealth ODL Higher Education Institutions

INSTITUTION	FOUNDED	COUNTRY/REGION	ENROLMENT	ENROLMENT TRENDS
Anadolu University	1958 (ODL provider since 1982)	Turkey	c. 1 million	Up strongly over time but losing ODL and overall market share
Athabasca University	1970	Canada	c. 41,000 (2013/14)	Slow growth in recent years; up about a third in a decade. Deficit in prior year, then surplus through cost cutting.
IGNOU	1985	India	c. 722,000	Up strongly long-term but down short-term following the close or hiatus of numerous "community colleges," MOUs and foreign alliances. Recent growth again.
Korea National Open University	1972 (various prior names)	South Korea	c. 150,000	Down in recent years. Reported as >200,000 in mid-1990s.
Kroton Educacional	1966 (post-secondary since 2001)	Brazil	c. 1.1 million	Up strongly over time, partly through acquisition; 58% of students are distance learners, primarily online.
National Open University of Nigeria	1983 (suspended, then revived in 2001)	Nigeria	c. 120,000	Unclear — conflicting data
Open Universities Australia	1993 (as Open Learning Australia)	Australia	c. 60,000	Up strongly following student access to national financial aid scheme. Most recent annual report (2013) does not disclose enrolment, suggesting stability or decline.
Open University China	1979	China	c. 3.6 million	Up strongly over time
Open University Malaysia	2001	Malaysia	c. 90,000	Little clear enrolment reporting. Last annual report appears to be 2010, which says 89,000. Wikipedia says 100,000. Clearly strong growth up to c. 2010.

INSTITUTION	FOUNDED	COUNTRY/REGION	ENROLMENT	ENROLMENT TRENDS
Open University of Catalonia	1995	Spain	c. 52,000 (2013/14)	Down over the past two years
Open University of Sri Lanka	1978	Sri Lanka	c. 38,000 (2013)	Strong growth over time. Up over 50% since 2007.
The Open University	1969	United Kingdom	c. 187,000 (2013/14)	Down by c. 25% since 2010/11, following UK funding changes for part-time students
Southern New Hampshire University	1932 (major ODL effort over past decade)	USA	c. 45,000	Up dramatically in recent years
University of Leicester	1921 (major ODL effort from late 1980s)	United Kingdom	c. 7,750	Down over the past few years
University of Phoenix	1976	USA	c. 214,000	Down from a peak of c. 450,000 students in 2010. Vast majority of students are online learners.
University of South Africa	1873 (as a wholly distance institution from 1959)	South Africa	c. 350,000 (2013)	Steady growth over time. Up almost 50% since 2007.
University of Southern Queensland	1967 (various prior names)	Australia	c. 28,000 (2013/14)	Slow growth in recent years. Losing ODL market share.
University of the South Pacific	1968	South Pacific	c. 25,000 (2013)	Up about a third since 2009. Deficit in most recent reported year.
University of the West Indies	1948	English-speaking Caribbean	c. 47,000 (2011/12)	Up about a quarter since 2007/8
Western Governors University	1997	USA	c. 55,000	Strong growth over the past decade

AU	Athabasca University
IGNOU	Indira Gandhi National Open University
KNO	Korea National Open University
NOUN	National Open University of Nigeria
OUA	Open Universities Australia
OUC	Open University of China
OUM	Open University of Malaysia
OUSL	Open University of Sri Lanka
SNHU	Southern New Hampshire University
UKOU	The Open University
UL	University of Leicester
UNISA	University of South Africa
UOC	Open University of Catalonia
UoP	University of Phoenix
USP	University of the South Pacific
USQ	University of Southern Queensland
UWI	University of the West Indies
WGU	Western Governors University

Endnotes

1. Now nearly 20 years old and therefore out of date in certain respects, a nonetheless useful book-length treatment of specialist ODL universities is Daniel (1996).
2. Allen and Seaman's report (2015) discusses new federal data on online learning which suggest the Babson Survey Research Group (BSRG) total may be somewhat inflated. Federal and BSRG data concur that at least five to six million American higher education students are engaged in at least one online course.
3. For example, see de Hart, Chetty and Archer (2015).
4. Appendix B contains a list of the acronyms used in this report for these sample Commonwealth institutions, as well as several others.
5. Frequently cited figures suggesting over three million students at IGNOU encompass a large number of dormant enrolments.
6. See IGNOU (2014).
7. UNISA enrolment data are taken from the university's 2013 annual report (UNISA, 2013) and from the Centre for Higher Education Transformation's South African Higher Education Open Data site (see chet.org.za/data/sahe-open-data).
8. UKOU enrolment data are taken from the university's latest annual report (2013/14) and the UK Higher Education Statistics Agency (HESA) website. The HESA data exclude UKOU students studying entirely outside the UK and students on programmes validated by UKOU, both of which UKOU appears to include in its total student headcount in its annual report. See HESA's "Table 1: HE students by HE provider, level of study, mode of study and domicile 2013/14" and prior tables, available at www.hesa.ac.uk/content/view/1973/239.
9. NOUN data are taken from the university's website, www.nou.edu.ng.
10. OUA enrolment data are taken from the organisation's 2013 annual report and prior annual reports, available at www.open.edu.au/about-us/media-centre/annual-reports.
11. AU enrolment data are taken from the university's 2013–14 annual report and prior annual reports, available at www.athabascau.ca/aboutau/strategic.php.
12. OUSL enrolment data are taken from the university's *Statistical Handbook 2013* (OUSL, 2013).
13. See www.ignou.ac.in/ignou/aboutignou/profile/3.
14. See UKOU's "Facts and Figures" webpage at www.open.ac.uk/about/main/strategy/facts-and-figures.
15. See the Centre for Higher Education Transformation's South African Higher Education Open Data site at http://chet.org.za/data/sahe-open-data.
16. For a discussion of QA arrangements at large ODL institutions, see Jung (2005).
17. See www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17765.
18. See www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=18123.
19. See chet.org.za/data/sahe-open-data.
20. See http://uofa.ualberta.ca/courses/dino101.
21. For these and other performance metrics, see WGU's student success and performance data at www.wgu.edu/about_WGU/graduate_success.
22. See www.knewton.com/overview/results.
23. BMO Capital Markets (2015, p. 2).
24. See the University of Leicester webpage "Distance Learning and CPD" at www2.le.ac.uk/study/distance.
25. All figures are from the University of Southern Queensland (2014, pp. 37–38).
26. There are academic studies that report attrition for specific ODL institutions. For example, a study of UOC found "total dropout" rates of 37–67 per cent across programmes; see Grau-Valldosera and Minguillón (2014).
27. Of course, this is not a new observation; see Laurillard (1993).
28. Researchers at UNISA provide some interesting reflections on the potential and problems of "big data" in a large ODL university; see Prinsloo (2015).
29. For example, see Wai (2009).
30. For example, see Mbati and Minnaar (2015). For a discussion of the history of ODL pedagogy, see Anderson and Dron (2011).

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