Chapter IX
An Analysis of European Megaproviders of E-Learning: Recommendations for Robustness and Sustainability

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ABSTRACT

This chapter presents an analysis of 26 European megaproviders of e-learning which had more than 100 courses or 5000 course enrolments in 2005. The focus is on distance education provision, not on e-learning for on-campus students. Among the megaproviders, which represent eleven countries, there are eight distance education institutions, 13 universities and university consortia, and five corporate training providers. Five institutions started e-learning in the eighties, ten in the nineties and eleven after the turn of the century. The largest provider, Learn Direct, claimed to have 400,000 course enrolments in 2005. However, only six of the 26 reported to have more than 20,000 course enrolments. Among these six top ranked institutions none are universities, only corporate training providers and distance education institutions. The chapter concludes with the 27 recommendations extracted from the analyses to help institutions obtain robustness and sustainability in online education.

INTRODUCTION

This chapter is a product of the European Leonardo da Vinci project "Megatrends in e-learning provision" (www.nettskolen.com/in_english/megatrends/the_project.html). The project was carried out from 2005 to 2007 and headed by NKI Distance Education in Norway. The six other project partners were: European Distance and E-Learning Network, Distance Education International in Ireland, The Open University of Catalonia in Spain, Estonian Information Technology Foundation in Estonia, Norwegian Opening Universities in Norway and Budapest University of Technology and Economics in Hungary.

The objective of the project was firstly, to identify the megaproviders of e-learning in the European Union which have achieved robustness, sustainability and critical mass. The second objective was to carry out case studies of the megaproviders to identify how and for what reasons they had successfully achieved maturity. The third objective was to identify recommendations from the megaproviders for the benefit of e-learning institutions and practitioners in Europe.

BACKGROUND

The project set out to identify the European megaproviders of e-learning using strict criteria for qualification. The outcome was that 26 institutions were identified as megaproviders, and in-depth interviews and case study articles were written for these institutions. The project then analysed the 26 megaproviders on the causes of their robustness, sustainability and achievement of critical mass. The megaproviders were primarily identified through:

- The development of 26 country reports;
- Major European networks for e-learning;
- The researchers' personal networks;
- Aanomination form at the project's Website.

The country reports developed by the partners are available in the 95-page document "The provision of e-learning in the European Union" (Arneberg et al., 2007). The reports were primarily based on available documentation, contacts with ministries of education, official e-learning officers and leading e-learning experts in Norway and the 25 members of the European Union.

The three important European networks for e-learning, EDEN (www.eden-online.org), EADTU (www.eadtu.nl), and EADL (www.eadl.org) were all approached. Requests for nomination were distributed to the EDEN members through the EDEN Newsflash in November 2005 and as an EDEN Request in September 2006. The participants at the EDEN conferences in Helsinki (2005), Castelldefels (2006) and Naples (2007) were also invited to nominate potential megaproviders. An invitation to submit nomination was emailed to the EADTU secretariat and the preliminary project results were presented at the EADTU annual conference in Tallinn (2006). A request for nominations was also distributed via the EADTU newsletter in the autumn of 2006.

Further, a number of individual experts on online education were asked to suggest potential megaproviders. The experts were identified and chosen based on the researchers' personal networks developed through many years of work with online education. The nomination form that was available on the project's Website was used to nominate several of the confirmed megaproviders as well as the six unconfirmed megaproviders listed in Table 3.

The project findings have continuously been published at the project Website with an invitation for readers to contribute with corrections, precisions or commentaries. Many have done so and their contributions have been included in the project findings.

CRITERIA FOR NOMINATIONS

The project identified, surveyed and analysed 26 European megaproviders of e-learning. The criteria for qualification were:

- It concentrates on e-learning situations with more than 5000 course enrolments per year or more than 100 courses on offer at any one time;
- It does not include corporate e-learning from a base outside Europe;
- It focuses on distance education and does not include the use of e-learning for on-campus students. At least 51% of a programme must be online to qualify.