



D2L

Digital transformation in higher education

Accelerating change in EMEA

Tools for success

EMEA universities are adopting new technologies to support staff and students through far-reaching changes to the delivery of higher education

The Covid-19 pandemic ushered in a new digital era and accelerated changes already taking place in the world of education. But even before the pandemic closed campuses and forced learning online, institutions in Europe, the Middle East and Africa (EMEA) were undergoing a digital transformation in education to meet the changing needs of students and staff.

This transformation is not simply about implementing digital technologies but changing pedagogical and organisational approaches to take advantage of these technologies. Through digital transformation, higher education institutions can address the needs of students and faculty and create a more connected learning environment.

IDENTIFYING TRENDS IN DIGITAL TRANSFORMATION

To understand how digital transformation is progressing, D2L has undertaken a survey of 4,830 higher education respondents. Conducted in the first quarter of 2021, the survey was given to respondents working in 11 specific job titles in Australia and New Zealand (ANZ), Benelux, Brazil, Colombia, India, Mexico, the Philippines, South Africa, Singapore, and the UK. In the EMEA region, the survey

includes respondents from Belgium, the Netherlands and Luxembourg (Benelux), South Africa and the UK. The data included in this eBook have been derived from the survey.

Across the region, most of the respondents that have a digital transformation strategy put it in place prior to the pandemic. Approximately 3 out of 10 respondents implemented their digital transformation strategy during or after 2020. The majority of respondents say the pandemic accelerated the implementation of their digital strategy because they had to rapidly respond to the altered needs of their students and staff.

Both overall, and in EMEA, there is a positive attitude towards the use of technology in education. About 90 per cent of respondents in South Africa and 81 per cent in the UK agree that technological developments enhance the quality of higher education. Only 10 per cent of respondents in Benelux disagree that technology enhances the quality of education, however the proportion that agree is lower than in the rest of EMEA (63 per cent). This reluctance to support the statement could be fuelled by the fact that the majority of respondents in Benelux (79 per cent) say their institutions had begun implementing their digital strategy prior to 2020. Therefore, some educational technologies have been in use in Benelux for years, meaning they may not be perceived as a technological development, but rather as a standard practice.



STEEP LEARNING CURVE AS EDUCATION GOES ONLINE

Only 12 per cent of Benelux respondents who took steps to ensure educational continuity during national lockdowns found the transition to online teaching difficult, compared with 30 per cent in the UK and 28 per cent in South Africa. This difference might be due to the fact that respondents in the UK and South Africa report experiencing greater pedagogical change than those in Benelux. In Benelux, 41 per cent of respondents who took steps to ensure educational continuity during national lockdowns have seen the introduction of new technologies improve the digital learning experience, while 48 per cent in the UK and 58 in South Africa have adjusted to new technologies. The greater the effort to implement new tools in a short time, the harder the transition was for institutions.

Additionally, the availability of support and training in the use of digital tools is a major challenge in the transition to online teaching. Of the respondents who took steps to ensure educational continuity during national lockdowns, a lack of support and training is cited as a challenge by 56 per cent of respondents in South Africa, 54 per cent in Benelux and 45 per cent of UK respondents. However, most EMEA institutions managed the move to online with surprising speed and minimal disruption: 56 per cent of respondents in Benelux, 53 per cent in the UK and 52 per cent in South Africa found the transition to online delivery during national lockdowns easy.

CONTENT IS KEY

Before the Covid-19 crisis hit, 76 per cent of those surveyed overall were creating their own content for flipped learning or similar pedagogical practices. In South Africa, 81 per cent of educators generate their own learning material for flipped classrooms. This figure drops to 76 per cent in the UK and 54 per cent in Benelux. When lockdowns closed campuses in 2020, 70 per cent of overall respondents moved their course materials online. While respondents in the UK (77 per cent) and South Africa (74 per cent) are aligned with the overall result, only 50 per cent of respondents in Benelux took the same steps. Furthermore, 38 per cent of respondents in Benelux who took steps to ensure educational continuity during national lockdowns introduced new or uplifted content to deliver a more engaging online experience during the pandemic, compared with 44 per cent in the UK and 51 per cent in South Africa.

Content-wise, Benelux is an outlier both in the EMEA region and overall. This might be due to a perception in the region that using existing content is not the same as creating new, purpose-built content for synchronous learning. Factors such as the maturity of the content market, budgets and the willingness to purchase learning material from content providers may also influence institutions' use of content. Benelux's longstanding adoption of digital learning environments possibly gave the region a head start when the pandemic hit.

EMBRACING TRANSFORMATION

Despite the considerable challenges of moving content online, training staff and introducing new tools in record time, 78 per cent of overall respondents say their attitude to technology has changed because of the pandemic, and 85 per cent say it has become more positive. “I was trying to encourage [the use of digital] tools before, but now they have been adopted very quickly,” says a respondent from the UK.

As campuses around the world were forced to close their doors, institutions had to pivot online rapidly, prompting them to rethink traditional learning methods. In their desire to continue providing students with quality education, universities were able to fast track their decision-making and introduce new processes quickly. Though many EMEA respondents cite a lack of support and training as a challenge in the transition online during the national lockdown, the majority (77 per cent) report feeling supported in the integration of learning technologies, and this is particularly high in South Africa, with 90 per cent of respondents saying they feel supported by their institution.

WHAT WILL THE FUTURE HOLD?

In how far the latest developments around the pandemic have been an influence is difficult to measure, but 92 per cent of South African, 85 per cent of UK and 62 per cent of Benelux respondents agree with the statement that educational institutions need to digitally transform to enable future growth. Asked about existing digitalisation initiatives, digital literacy is a focal point for 61 per cent of South African and 48 per cent of UK respondents. Other efforts are directed towards lifelong learning programs (44 per cent overall, 55 per cent South Africa and 44 per cent UK) and widening participation of learners (44 per cent overall, 46 per cent South Africa and 38 per cent UK). Already in the five years before the survey, more than half of overall respondents saw an increase in the number of adult learners, both part-time and full-time and for the following 10 years institutions expect to see an increase of adult learners, which is highest in South Africa with 67 per cent, and around 50 per cent in the UK and Benelux.

Again, Benelux respondents differ slightly in their top three ongoing initiatives. The implementation of open educational resources (OERs) is the most common initiative, at 41 per cent, followed by digital literacy (36 per cent) and internationalisation (33 per cent). It seems that OER initiatives have in recent years taken a flight in the region, while the focus on internationalisation is traditionally strong in non-English speaking countries with global players in Higher Education and has been supported actively by governments in most Bologna-countries. Looking at the top priorities that organisations think need to be addressed within the 24 months following the survey, it seems existing trends are expected to continue. In the UK and South Africa, more than half of respondents say improving digital skills within the academic community is a priority. A significant push can be expected to upskill staff and students so they can make use of the plethora of new technologies that have become a fundamental part of teaching and learning.

DRIVING CHANGE

Overall, learning management systems (LMS) are one of the most widely and successfully used digital tools in higher education. When asked what is most important in an LMS, accessibility scores the highest in South Africa (48 per cent), while reliability is cited the most in the UK (44 per cent) and Benelux (27 per cent). Having flexible ways to teach and engage students is also important to institutions, ranging from 47 per cent in South Africa to 44 per cent in the UK. In Benelux, communication and collaboration tools (27 per cent) and tools to personalise learning (25 per cent) also score highly.

Institutions understand that initiatives to support lifelong learning, widening participation and closing the digital skills gap will be underpinned by personalisation, collaboration and flexibility. These features will enable traditional students, lifelong learners and adult students to decide when, where and how to study. *“There is a realisation that technology has a greater part to play in the future of education,”* says Stewart Watts, vice-president for EMEA at D2L. *“And personalisation in education is just going to increase. The keyword there is flexibility.”*

Benelux: Western European bloc leads digital transformation

Countries push to build on existing expertise and improve online education by pursuing innovative new approaches

In many ways, institutions in Benelux countries had a different experience of digital transformation to their peers in South Africa, the UK and overall. Respondents in Benelux are a bit more reluctant to support the notion that technological developments enhance the quality of higher education. They are less likely to create their own content for flipped learning, and those who took steps to ensure educational continuity during national lockdowns are also less likely to introduce new or uplifted content to deliver a more engaging online experience.

Benelux respondents also found the transition to online delivery easier than other countries, with 56 per cent of those who took steps to ensure educational continuity during national lockdowns reporting it was easy compared

with the overall average of 49 per cent. Benelux's apparent hesitance to support technological developments may be the result of its early adoption of digital transformation.

PLANNING AHEAD

Higher education institutions in Benelux began implementing their digital transformation journey earlier than many other countries: 30 per cent of respondents with a digital transformation strategy started planning in 2016, and 84 per cent did so prior to 2019. This percentage is substantially higher than the overall average, where 15 per cent of respondents started planning in 2016 and 73 per cent prior to 2019.

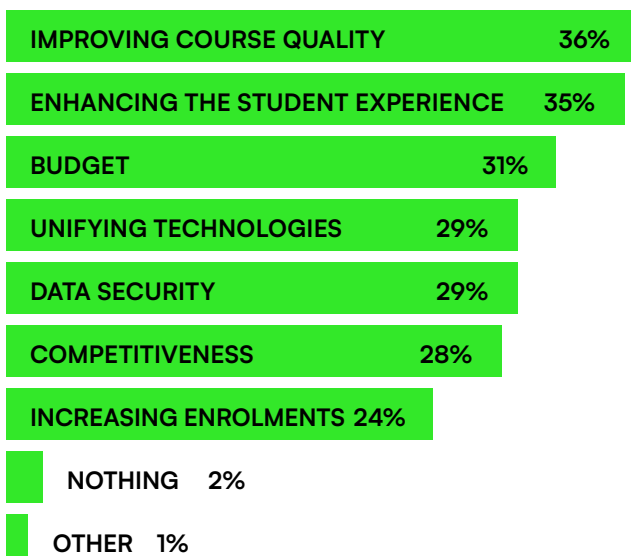
Overall, students are the group most pushing the digital agenda forward at universities with a digital transformation strategy, at 45 per cent, followed by leadership with 38 per cent. At Benelux universities, this drive is more equally distributed between students, staff, technology companies, leadership, governing boards, faculty and the international agenda, meaning the responsibility for digital change is being carried evenly across all stakeholders, with neither a bottom-up or top-down driving force in place.



QUALITY EDUCATION

For Benelux respondents with a digital transformation strategy, the factors driving change are improving course quality (36 per cent) and enhancing the student experience (35 per cent). Factors such as budget and financial sustainability, the unification of technologies, data security, greater competitiveness and increased student enrolments, although important, play a lesser role. Therefore, it is unsurprising that the key desired outcomes of digital transformation strategies for Benelux respondents are improving student engagement (38 per cent) and measuring and improving learning outcomes (37 per cent). Staying ahead of the competition and growing international student numbers are less important outcomes for Benelux respondents, where the responses stand at 30 per cent and 31 per cent respectively.

WHAT IS DRIVING INSTITUTIONS' DIGITAL TRANSFORMATIONS?



OVERCOMING OBSTACLES

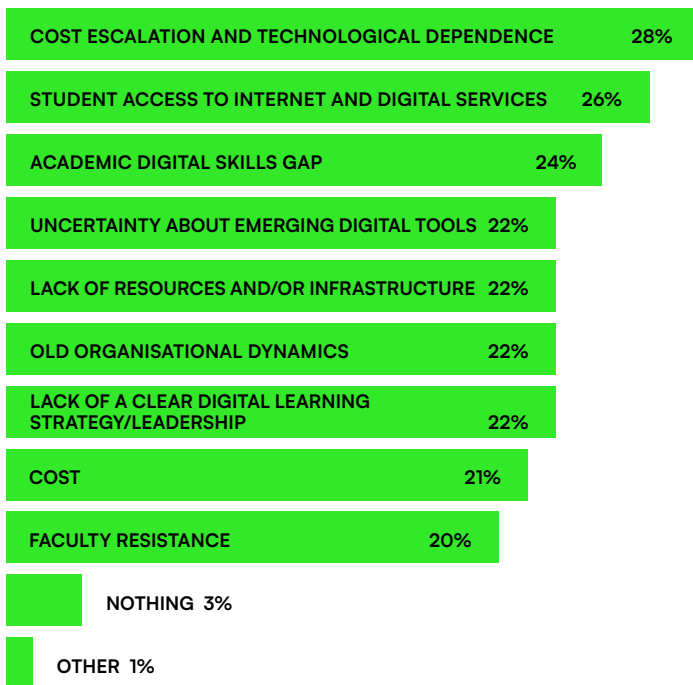
D2L's survey asked respondents with a digital transformation strategy what the major obstacles they face are. For Benelux respondents, the challenges are evenly distributed. Cost, access, the digital skills gap, a lack of resources, old organisational dynamics, and a lack of leadership all score between 20 and 28 per cent. However, other countries surveyed show more pronounced results. In South Africa, student access to the internet and digital devices tops the list of obstacles at 42 per cent, with cost escalation coming in second at 35 per cent. In the UK, cost is one of the main obstacles for 41 per cent of respondents. Whereas, just 21 per cent of Benelux respondents say cost is one of the greatest obstacles they face.

This suggests that Benelux countries benefit from digital maturity, with support from all stakeholders and a diverse mix of initiatives in place to address obstacles. This means many higher education institutions in Benelux may have already had systems in place to respond when the pandemic closed campuses. They didn't need to introduce as many new technologies to cope with remote teaching and were prepared to respond to the challenges of digital transformation, having already laid the foundations.

ENHANCING ONLINE EDUCATION

Higher education institutions in Benelux enjoyed many successes as a result of their digital transformations, but there is still work to do to truly embrace technology in education. Overall, the major focus is on improving digital skills within the academic community (53 per cent), something that only 34 per cent of Benelux respondents want to focus on, indicating that digital maturity goes hand in hand with digital literacy. One of the priorities for Benelux institutions in the coming years is to enhance their online provision, according to 41 per cent of respondents. Another pressing issue is to invest in online examination tools.

WHAT ARE THE MAIN OBSTACLES INSTITUTIONS FACE WITH THEIR DIGITAL TRANSFORMATION STRATEGIES?



Of the technologies that best support institutions with a digital transformation strategy, 37 per cent of Benelux respondents believe virtual classrooms are the technology that is best supporting teaching, followed by learning analytics (30 per cent) and video assessment (26 per cent). This focus on next-generation tools suggests that, for Benelux institutions, learning management systems provide a reliable foundation for teaching and learning activities, upon which the future of education can be built. Despite the challenges of recent months, the pandemic has brought about a change in attitude that will set the region up for further successes. Like the rest of the respondents surveyed, most Benelux respondents (67 per cent) say the pandemic has changed their attitude towards edtech, with 56 per cent saying it has become more positive. *“The Netherlands has the most innovative higher education sector in EMEA,”* says Stewart Watts, vice-president for the EMEA region at D2L. *“Institutions in Benelux are trendsetting and unafraid to shake it up.”*

DID YOU KNOW?

67 per cent of Benelux respondents say the pandemic has changed their attitude towards edtech, with 56 per cent saying it has become more positive.

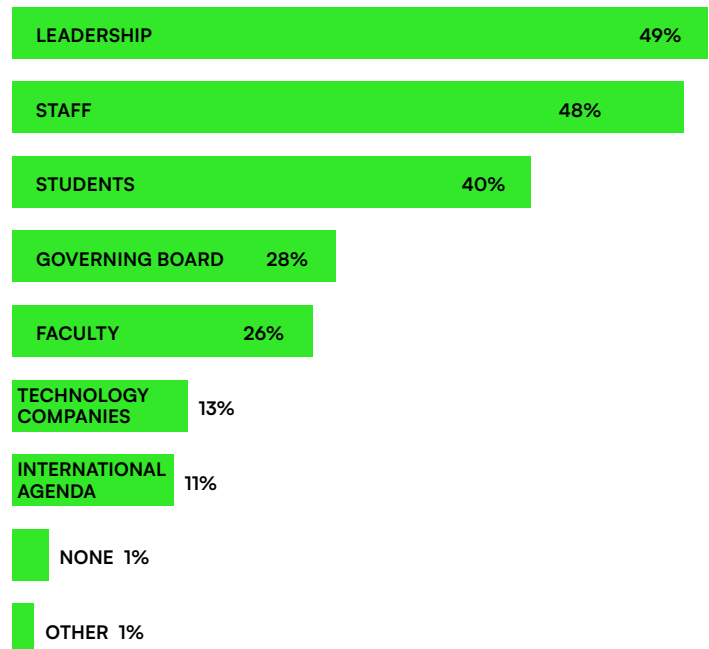
UK: leadership pushes digital transformation agenda

Student experience underpins UK universities' drive to implement new technologies and transition to blended learning

University leadership is the major driver of the UK's digital agenda, according to D2L's survey. Unlike most countries surveyed, the majority of UK respondents with a digital transformation strategy feel that their leadership drove the digital agenda (49 per cent), followed closely by their staff (48 per cent). This bucks the overall trend, in which 45 per cent of respondents see students as the major force behind the digital agenda, with leadership (38 per cent) and staff (32 per cent) trailing behind.

Even though students are not the primary agents behind the shift, they are one of the main reasons leadership in the UK want to institute a digital transformation programme. According to the survey, enhancing the student experience (51 per cent) and improving course quality (47 per cent) are the prominent drivers of change in the UK. "There's been a realisation that technology has a bigger part to play in the future of education," says Stewart Watts, vice-president for EMEA at D2L. "Universities are going to need to up their game to compete and generate revenue."

WHICH GROUPS ARE PUSHING INSTITUTIONS' DIGITAL AGENDAS FORWARD?



Of those surveyed in the UK, 84 per cent state that institutions need to digitally transform to enable future growth. Nearly 52 per cent of respondents with a digital transformation strategy hope it will improve student engagement, while 48 per cent want it to measure and improve learning outcomes, and 46 per cent aim to improve student retention and completion.

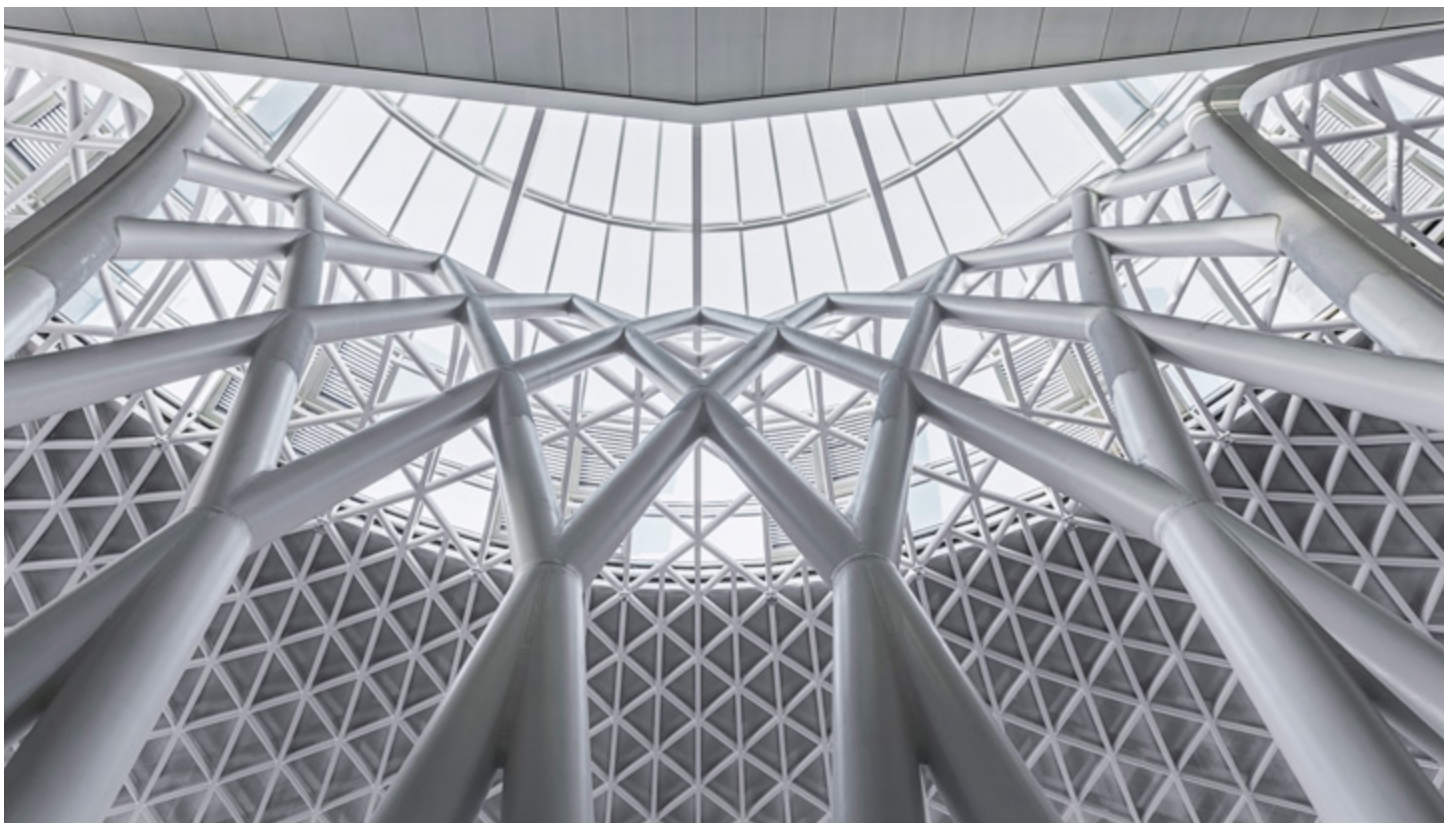
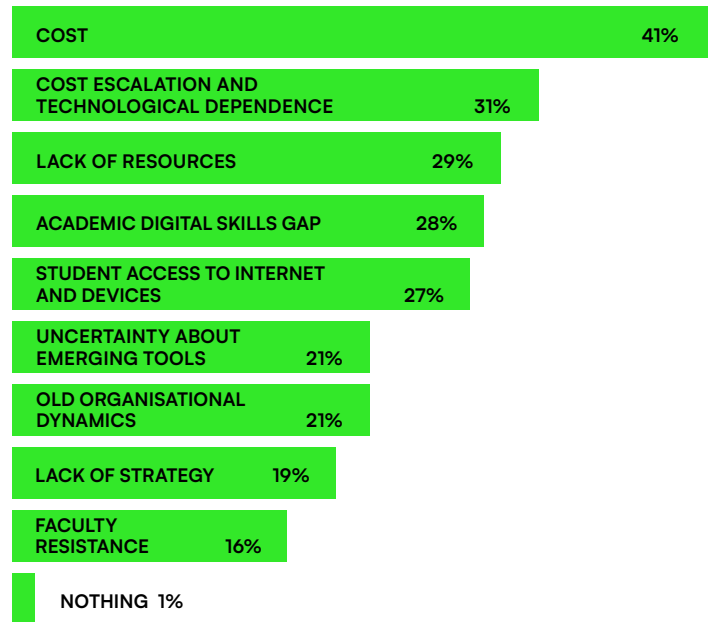
A GROWING APPETITE FOR DIGITALISATION

The vast majority of respondents in the UK had a digital transformation strategy prior to the Covid-19 pandemic pushing learning online, but 62 per cent report that the crisis accelerated their implementation. Almost 39 per cent of respondents created their own digital transformation strategy, and the majority of respondents implemented their strategies without the assistance of third-party consultants.

Many respondents feel that their institutions are trying to act on the growing appetite for digital learning. As many as 48 per cent of those who took steps to ensure educational continuity during national lockdowns saw the introduction of new technologies to improve the digital learning experience, while 46 per cent saw an increase in digital skills within academic and learner communities.

For 81 per cent of respondents from UK institutions, online technology enhances the learning experience, and senior management—such as vice-chancellors, their deputies and pro vice-chancellors—overwhelmingly agree this is the case. This sentiment is true both for research and student-focused institutions.

WHAT ARE THE MAIN OBSTACLES INSTITUTIONS FACE WITH THEIR DIGITAL TRANSFORMATION STRATEGIES?





COST STIFLES INNOVATION

Three of the greatest obstacles faced by UK respondents with a digital transformation strategy are cost, cost escalation and technological dependence, and lack of resources or infrastructure. In this way, the UK—as well as Benelux—bucks the overall trend: for most respondents, student access to the internet and digital devices is the major impediment to the implementation of their digital strategy. There are practical challenges in moving online, the survey respondents say. Thirty per cent of those who took steps to ensure educational continuity during national lockdowns say it is somewhat or very difficult to transition from campus-based learning to online instruction, and one of the greatest challenges they encounter is a lack of support and training in the use of digital tools to deliver education.

DID YOU KNOW?

81 per cent of UK respondents agree that online technology enhances the quality of higher education.

CHANGE FOR THE BETTER

Despite challenges, 48 per cent of respondents in the UK say their institutions have digital literacy initiatives in place to support their digital transformation. Though a lack of support and training is a challenge for many respondents in the transition to online during national lockdown, 41 per cent say there is training available at their institution to introduce faculty and staff to new technologies and support their use, which will help close the digital skills gap.

Moving forward, one of the priorities for institutions in the UK is improving digital skills in the academic community, with 51 per cent of respondents looking to address this issue. This highlights that UK institutions are paying attention to educators' concerns about training and are seeking to better support staff in their digital transformations. Another priority for UK respondents is enhancing their online provisions, according to 52 per cent. Overall, enhancing the online provision is a priority for 48 per cent of respondents, suggesting that the UK and Benelux are beginning to think about refining their current digital offering.

South Africa: student engagement drives digital transformation

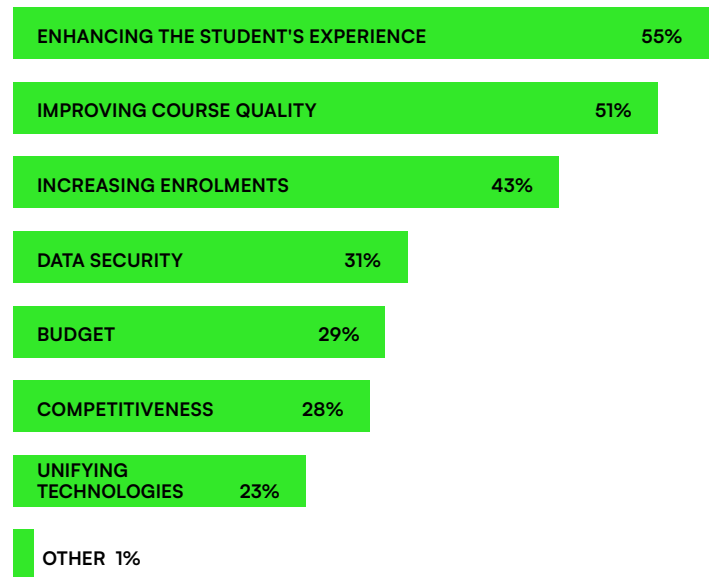
South Africa pushes digital skills training among students and staff to implement new technologies

In South Africa, a drive to enhance the student learning experience is at the heart of the digital transformation agenda for institutions with such a strategy. Prior to the pandemic, a mean of 45 per cent of the learning provision was available online, despite nearly 9 out of 10 respondents with a digital transformation strategy having started planning before 2020. The Covid-19 crisis sped up efforts to implement a digital transformation strategy, with 71 per cent of respondents stating it had accelerated their efforts.

Change is “starting to happen” in South Africa, says Stewart Watts, vice-president for EMEA at D2L. “It will probably be like a domino effect.” The survey’s findings echo this sentiment, and the majority of those surveyed in South Africa feel that technology is key to not only coping with the crisis but to enhancing their educational

offering. More than 90 per cent of those surveyed say that institutions need to digitally transform to enable future growth.

WHAT IS DRIVING INSTITUTIONS' DIGITAL TRANSFORMATION STRATEGIES?

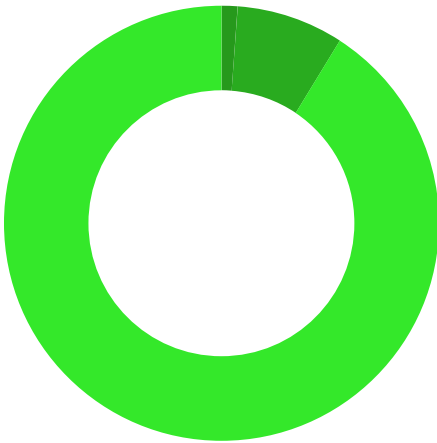


CHANGING MINDS

In the EMEA region, South Africa has the highest percentage of respondents (88 per cent) who experienced a change in attitude towards education technology, and this change is overwhelmingly positive, with 93 per cent feeling this way. Furthermore, 89 per cent of those surveyed believe that technological developments enhance the quality of higher education at their institution.

The positive attitude of respondents in South Africa is reflected in the benefits they have enjoyed as a result of digital transformation. Respondents who took steps to ensure educational continuity during national lockdowns have seen an increase in the level of digital skills within academic and learner communities, which, at 59 per cent, is higher than that reported in the UK (46 per cent) and Benelux (39 per cent). Similarly, 58 per cent of respondents in South Africa report the introduction of new technologies to improve the digital learning experience, a significantly higher proportion than their colleagues in other EMEA countries.

IF ATTITUDES TOWARDS EDTECH CHANGED BECAUSE OF THE PANDEMIC, HOW HAVE THEY CHANGED?

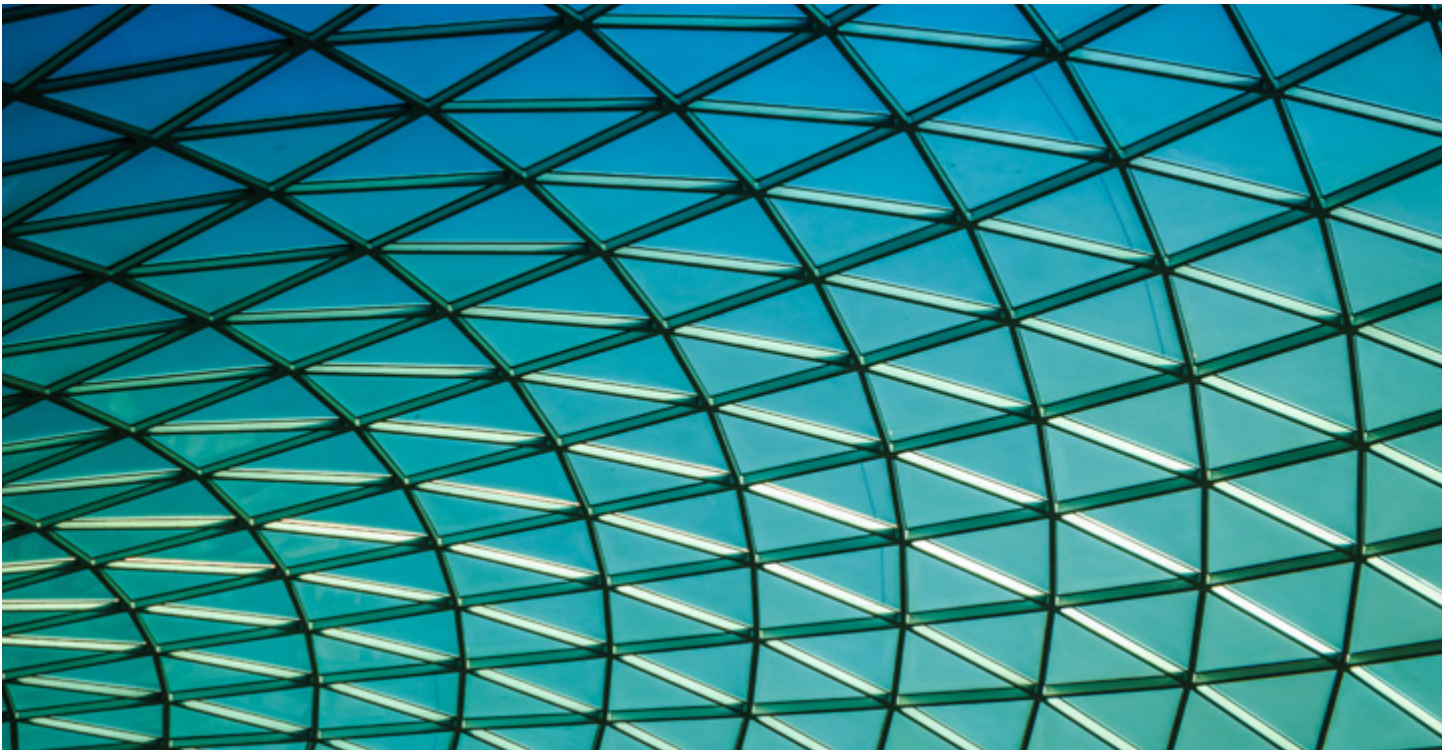


- 1% OTHER
- 6% IT'S MORE NEGATIVE
- 93% IT'S MORE POSITIVE

DID YOU KNOW?

89 per cent of respondents in South Africa believe that technological developments enhance the quality of higher education at their institution.





THE DIGITAL DIVIDE

One of the main desired outcomes of digital transformation for South African respondents with a transformation strategy is to improve student engagement. This focus on student success is encouraging, given the fact that digital inequality is **affecting students in South Africa more sharply** than other EMEA countries.

The digital divide is the gap between those who have ready access to computers and the internet, and those who do not. When institutions began implementing their digital transformation strategies, many students and staff without access to the internet and devices were left behind. The pivot to remote online instruction made this divide even wider. This was apparent in the concerns raised by respondents in South Africa. According to 42 per cent of respondents with a digital transformation strategy, the availability of the internet and devices is a major obstacle to implementing digital transformation strategies. This percentage is higher than that of other surveyed countries in EMEA (at 26 per cent for Benelux and 27 per cent for the UK) and overall (37 per cent). Digital infrastructure in South Africa is **less developed** than other EMEA countries, and the **cost of internet access is high**. Consequently, the divide between students and staff who can and cannot access the internet and devices is stark.

There is also a divide between those who are confident using new learning technologies and those who require more support. In South Africa, 31 per cent of respondents with a digital transformation strategy report that the academic digital skills gap is an obstacle to digital transformation, while a lack of support and training in the use of digital tools to deliver education is the most cited challenge in the transition online during national lockdown. However, 61 per cent of respondents say their institution has a digital literacy initiative, which would help to close this gap. About 90 per cent of those surveyed say they have the support of their institutions to successfully integrate technology, compared with 79 per cent overall.

TRANSFORMATION GAINS MOMENTUM

The push to improve digital skills remains high on South African institutions' agendas, according to respondents. Almost 60 per cent of those surveyed say that improving digital skills is one of their main priorities in the 24 months following the survey. As digital transformation in South Africa's higher education sector gains momentum, these skills and capabilities will be indispensable to support students and other staff to cope and innovate with new technologies.

Digital transformation in EMEA: what's next?

Personalisation is set to become increasingly important as institutions work to differentiate themselves from others

LOOKING TO THE FUTURE

Technology has a significant role to play in the future of education. Many institutions rushed to make content available online when their students were no longer able to access campuses, but this is only the beginning of digital transformation. When asked if institutions need to digitally transform to enable future growth, 92 per cent of respondents in South Africa, 84 per cent in the UK and 62 per cent in Benelux agree that they do.

In South Africa and the UK, respondents' top three initiatives moving forward are the same, with digital literacy proving most important (61 per cent and 48 per cent respectively), followed by lifelong learning (55 per cent and 44 per cent) and widening participation (46 per cent and 37 per cent). Benelux respondents differ to the rest of EMEA in terms of their future plans, which are offering open educational resources (41 per cent), improving digital literacy (36 per cent) and boosting internationalisation (33 per cent).

WHAT STUDENTS WANT

Personalisation is where digital transformation comes into its own in EMEA, using technology to customise the student experience and make learning more flexible. Overall, the most important aspect of a learning management system is that it offers a flexible way to teach and engage students (42 per cent), followed by

accessibility (38 per cent). *"There's a big lesson here as we drive towards transforming higher education,"* says Stewart Watts, vice-president for Europe, the Middle East and Africa (EMEA) at D2L. *"Technologies need to do a better job of personalising [the student] experience and meeting learners where they are."* Students are demanding the flexibility to study when, where and how they want, and the institutions that offer this will differentiate themselves from their competitors and be more attractive to students in the coming years.

Flexibility will be particularly important when responding to the needs of lifelong learners, adult students and those looking to upskill or reskill. The majority of respondents in the EMEA region are expecting a spike in adult learner enrolments over the coming years, and more than two-thirds of EMEA respondents have a strategy to accommodate them. Universities will need to cater to this changing cohort with flexible, technology-guided curricula.

AGILITY IS ESSENTIAL

The Covid-19 crisis has brought about a fundamental change in higher education institutions. Historically, they may have been bureaucratic and slow to change, but the pandemic pushed institutions to accelerate their digital transformation. Many of those who took steps to ensure educational continuity during national lockdowns adopted new technologies and introduced training to upskill their staff and students, and it is likely that they will continue to employ new technologies and modernise their infrastructure.

This agility will stand them in good stead: the world of technology is rapidly evolving as higher education experiences a sector-level digital transformation. Institutions that are agile and able to innovate will better serve their students.






ABOUT D2L

D2L is transforming the way the world learns, helping learners of all ages achieve more than they dreamed possible. Working closely with clients all over the world, D2L is supporting millions of people learning online and in person.

D2L Brightspace is an award-winning, cloud-based learning platform built for people who care deeply about student success and equity in education. Brightspace is a robust solution being used by more than 1,000 customers in over 40 countries across K-12, higher education, healthcare, government, associations and the corporate sector.

To begin the next step of your digital transformation, contact D2L at [D2L.com](https://www.d2l.com).

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