

I: Market Intelligence on Competition, Learner Demand, and Revenue Potential

What's a specific takeaway in this section for my institution?

(L) (M) (H)

Limited Regulation or Standardisation

Only select governments are evolving HE funding or accountability mechanisms to include credentials

(L) (M) (H)

A Truly Global Market

Demand is greatest outside North America, drawing experienced learners, and while fast growing, the alt. market is relatively small

(L) (M) (H)

Not a Standalone EDI Solution

Lower priced and faster alt. programmes still require additional aid and resources to move the dial on student access and equity

(L) (M) (H)

Intense Competition from Non-HE Providers

Majority of non-degree credential market is controlled by corporations and non-HE entities

(L) (M) (H)

Differentiate on Service, Not Just Content

Universities must differentiate on student services and support, not on increasingly ubiquitous content

(L) (M) (H)

Decision to Build or Partner Will Vary

Determining right investment path depends on need for immediate revenue

II: Best Bet Institutional Opportunities for Alternative Credentials

What's a specific takeaway in this section for my institution?

(L) (M) (H)

Focus on Interdisciplinarity

HE opportunities likely at the intersection of disciplines where competitors lack breadth of knowledge

(L) (M) (H)

Design for Specific Adult Learner Segments

Even within the same discipline, learners' desired outcomes impacts ideal format, delivery, and price point

(L) (M) (H)

Never Lose Sight of the 'Job to be Done'

Credentials can teach hard skills, develop cutting edge competency, or simply provide management-level "need to know"

(L) (M) (H)

Embed Assessment in Credentials for Hard Skills

Move beyond "proof of completion" as the primary outcome for credential offerings

(L) (M) (H)

Scale by Serving Your Own Alumni First

In low-margin programmes, recruiting high-affinity groups can limit recruitment spend

(L) (M) (H)

Consider Credential Evolutions of Existing PGT Programmes

Leverage disciplinary strength to offer shorter, less expensive credentials aligned with your existing brand

III: Insights into Mass Credential Platforms and MOOC Programmes

What's a specific takeaway in this section for my institution?

(L) (M) (H)

MOOCs Can Be Profitable!

Successful monetization is built on pathways from module to credential to degree

(L) (M) (H)

Platforms Provide Scale, But At What Cost?

HEIs struggle to differentiate on platforms and may increasingly struggle against corporate alternatives

(L) (M) (H)

MOOC Scale Potentially Solves Recruitment Challenge

Cost to advertise credential/degree offers overcome by sheer scale of interested and engaged platform learners

IV: Evolutions in Degree Programmes to Bolster Competitiveness

What's a specific takeaway in this section for my institution?

(L) (M) (H)

MOOC-Powered Credentials

MOOCs increasingly serve as essential building blocks of alt. credentials

(L) (M) (H)

Mass Education Platforms

Credential platforms and marketplaces are disrupting the alt. credential market strategy, creating new intermediaries

(L) (M) (H)

Emerging Market Access Pathways

Institutions can engage in the secondary market (e.g., lead sourcing) without creating their own programmes

(L) (M) (H)

Degree Value Proposition Holds

Master's degrees remain insulated to an extent from direct competition with alt. credentials

(L) (M) (H)

Fusing Alternative Practices Into Degrees

Numerous pathways exist to evolve the degree using alt. market innovations such as stackable certificate programmes

(L) (M) (H)

Ultra-Low-Cost MOOC Degrees

More disruptive market force is advent of MOOC-based degrees and hybridisation of traditional with alternative

What questions should I ask when I return to campus? What people or data will I need to answer them?