

THE CAMPUS COMPUTING PROJECT

The 2003 National Survey of Information Technology in U.S. Higher Education

Campus Policies Address Copyright Issues; Wireless Networks Show Big Gains

The majority of colleges and universities currently have campus policies that address the unauthorized distribution of digital content on campus networks, according to new data from The Campus Computing Project. Two-thirds (66.2 percent) of the campuses participating in the 2003 Campus Computing Survey report institutional policies intended to stop the downloading commercial music or video content from the Internet.

The survey data reveal that policies intended to stem downloading are most common at universities: almost four-fifths of universities (80.9 percent for public universities and 77.5 percent for private universities) have campus codes of conduct that focus on downloaded commercial content. In contrast about two-thirds of both public and private four-year colleges have codes of conduct regarding downloaded commercial content. Only half (49.6 percent) of the community colleges participating in the 2003 Campus Computing Survey have campus policies that address the issue of unautho-

rized digital content on campus networks.

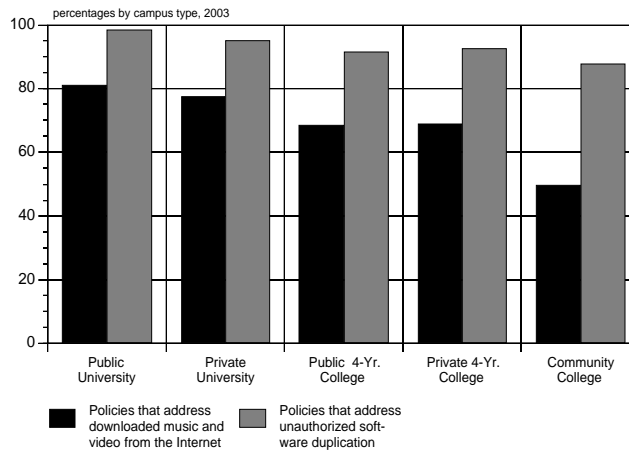
“The 2003 survey data confirm that colleges and universities are mak-

ing significant efforts to respond to the concerns of media industry officials regarding the unauthorized distribution and downloading of music, video, and other commercial content on campus networks,” says Kenneth C. Green, founding director of The Campus Computing Project

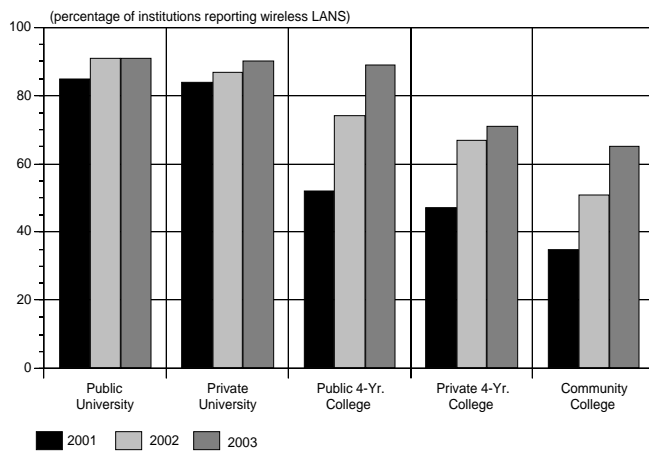
However, while not condoning the behavior of students who download music and film, Green notes that college students have become an easy target for the media industries: “Although growing numbers of consumers now have access to high speed networks from home, media industry groups that are understandably unhappy about the proliferation of digital content on the Internet continue to focus on college students because they represent a large, easily identifiable and easily targeted population.”

Green cites other data that reflect the campus commitment to protecting copyright. For example, almost all campuses (92.3 percent) have policies intended to stem the duplication of commercial software; similarly nine-of-ten (87.4 percent)

Copyright and Campus Codes of Conduct



Wireless Networks, 2001-2003



have campus codes covering print content such as books and journal articles.

“Campus copyright protection policies did not emerge overnight,” says Green. “It took a few years, but in the end colleges and universities took appropriate steps to address industry concerns about both software piracy and content in coursepacks. The survey data confirm that colleges are taking action to respond to the problem created when students download copyrighted music or film on campus networks.”

The survey data reveal some dramatic gains over the past year regarding campus planning for and the deployment of wireless networks (WiFi). For example, the portion of campuses reporting strategic plans for wireless networks rose to 45.5 percent in fall 2003, up from 34.7 percent in 2002 and 24.3 percent in 2001.

Almost four-fifths (77.2 percent) of the campuses participating in the 2003 survey report wireless LANS, up from two-thirds (67.9 percent) in 2002 and 29.6 percent in 2000. A seventh (14.2 percent) indicate that full-campus wireless networks are up and running at their institutions as of fall 2003, compared to a tenth (10.0 percent) in 2002 and just 3.8 percent in 2000. Across all sectors, the 2003 data suggest that wireless services cover more than a quarter (27.4 percent) of the campus at institutions reporting wireless networks, compared to less than a fifth (18.3 percent) in 2002 and just 10.9 percent in 2001.

“Wireless is clearly exploding across college campuses, much as it is in the corporate and consumer sectors,” says Green. “Rising expectations about campus WiFi services are fostered by the dramatic growth of inexpensive wireless in the consum-

sumer sector. Students and faculty come to campus wondering why there is no wireless service in dorms, classrooms, offices, and the campus quad, when they have at WiFi home.”

The number of campuses that have Web-based portals rose to 28.4

percent in 2003, up from 21.2 percent in 2002. However, survey respondents generally gave mediocre evaluations to their own portal service. Asked to assess campus portals as part of a broad evaluation of the campus IT infrastructure, CIOs ranked campus portals lowest among 13 different IT infrastructure components (scale score for portals=3.4; scale: 1=poor; 7=excellent). The highest ranked infrastructure components were computer networks (5.9) and online library resources (5.6)

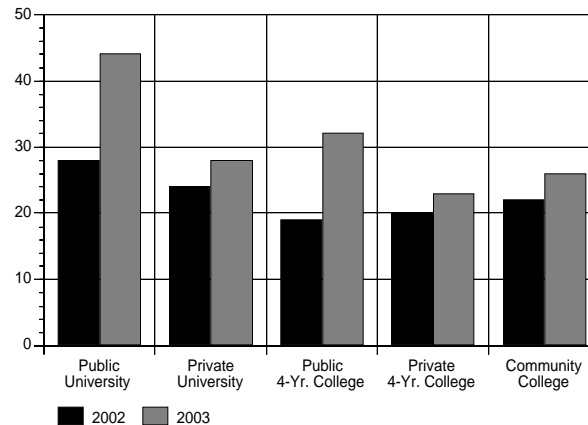
The survey data show slow, steady gains on selected eCommerce and eService issues. Over half (53.4 percent) of the institutions participating in the 2003 survey can process credit card payments from their Web sites, up from two-fifths (40.5 percent) in 2002 and 18.6 percent in 2000. More than three-fourths (76.6 percent) of the survey participants, typically campus CIOs or CTOs, report that their campus of-

fers online course registration, compared to 70.9 percent in 2002, half in 2001, and a fifth (20.9 percent) in 1998.

“The data show continuing improvements on key eCommerce and

Campus Portals

(institutions reporting a working campus portal, 2002 vs. 2003)



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THE CAMPUS COMPUTING PROJECT

Begun in 1990, The Campus Computing Project is the largest continuing study of the role of information technology in American higher education. The project's national studies draw on qualitative and quantitative data to help inform faculty, campus officials, policy-makers and others others interested in a wide array of information technology issues that affect American colleges and universities.

The 2003 Campus Computing Survey was supported, in part, by the following sponsors: Academic Systems, Apple Computer, BearingPoint, Blackboard, Cisco Systems, Collegis, Converge Magazine, Datatel, Dell Computer, eCollege, EDUCAUSE, Eduventures, Follett Higher Education Group, Gateway Computer, Hewlett Packard, Houghton Mifflin Company, IBM Higher Education, Intel, Jenzabar, LearningTimes, Luna Imaging, Macromedia, Microsoft, National Education Association, Palm Computing, Pearson Education, PeopleSoft, SAP Public Sector, SAS, SCT Corp., Software & Industry Information Assoc., Sun Microsystems, Thomson Learning, TouchNet, and XanEdu.

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eService issues,” says Green. Yet he believes that the campus community is still playing catch-up on these issues. “Considering the wide array of electronic commerce and service options routinely available to students and faculty in the consumer and corporate sectors, it’s clear that the campus community is still roughly two years behind in its eCommerce/eService offerings.” At the end of the day, says Green, “the benchmarks are still Amazon, Abercrombie, and for some even AARP — consumer sites that are all too familiar to students and faculty, and that offer far richer, more customized information and services than are commonly found on most college and university Web sites.”

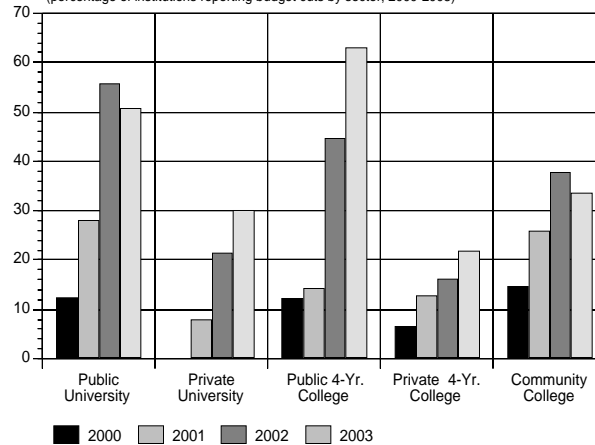
The 2003 survey confirms that budget cuts continue to cast a shadow over campus IT initiatives and investments. Fully two-fifths (41.3 percent) of the survey participants report budget cuts affecting academic computing this year, up from 32.6 percent in 2002 and just 18 percent in 2001. Similarly, just over two-fifths of the institutions report reduced funding for administrative computing, compared to almost one-third (31.0 percent) in 2002, and one-fifth (18.3 percent) in 2001. Across sectors, public institutions (universities, four-year colleges, and community colleges) are more likely to report budget cuts that private universities and four-year colleges.

Another indicator of troubled technology funding is the growing number of colleges and universities experiencing mid-year budget cuts. Fully one-third (32.4 percent) of the

2003 survey participants report mid-year budget cuts this past year, up from 24.9 percent in 2002 and 8.0 percent in 2001.

Budget Cuts in Academic Computing

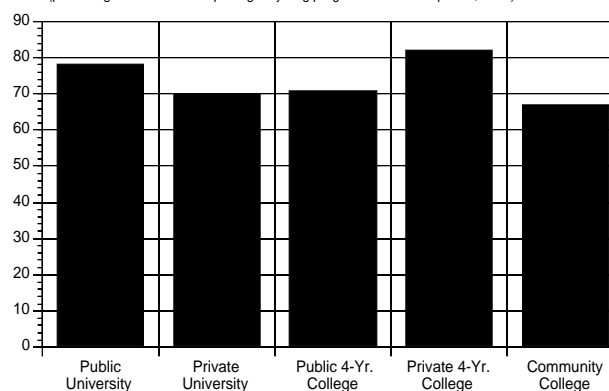
(percentage of institutions reporting budget cuts by sector, 2000-2003)



Budget cuts notwithstanding, some IT initiatives received additional funding this year. For example, almost half the institutions participating in the 2003 survey (49.7 percent)

Recycling Used Computers

(percentage of institutions reporting recycling programs for old computers, 2003)



report increased funding for IT security issues, compared less than a tenth (8.9 percent) that experienced budget reductions affecting IT security.

ERP budgets also experienced gains in some institutions: almost half of the surveyed campuses report increased funds for IT security, com-

pared to a seventh (15.1 percent) reporting cuts in security budgets. A third (31.1 percent) also reported increased funds for ERP software and services, compared to a seventh (15.1 percent) reporting cuts in the ERP budget.

Even with budget cuts, however, colleges and universities buy – and consequently must dispose of – thousands of computers every year. The 2003 Campus Computing Survey suggests individual colleges and universities bought, on average, some 1,300 desktop and notebook computers this past year. Public universities purchased, on average, more than 3,400 new computers last year (2002/03).

As for the old computers, the data reveal that three-fourths (75.0 percent) of the institutions participating in the 2003 Survey have campus policies to encourage or mandate recycling of old/obsolete computer equipment.

Begun in 1990, The Campus Computing Survey, is the largest continuing study of computing and information technology in American higher education. The 2003 survey is based on data provided by campus officials, typically the CIO, CTO, or most senior campus IT officer, representing 559 two- and four-year public and private colleges and universities across the United States. Survey respondents completed the questionnaire during summer and fall, 2003.

Copies of the 2003 Campus Computing Report will be available on December 10th. Price: \$37 (plus \$2.00 shipping). Order from Kenneth Green, c/o Campus Computing, PO Box 261242; Encino, CA 91426-1242. Please use the order form on page 4.

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