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OER up!

Regional Analysis Report
an European perspective

Open Educational Resources uptake in adult education

THE OERup! CONSORTIUM

MFG Innovation Agency Media and Creative Industries

UOC Universitat Oberta de Catalunya

NIACE The National Voice for Lifelong Learning

SOPHIA R & I

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INTRODUCTION

This report presents the data collected during the need analysis carried out by the Italian partner SOPHIA R&I on the use of OER in adult education in Europe.

SOPHIA R&I is an association promoting the participation of Italian public and private organisations in R&D and Innovation programmes, mainly founded by the European Union. In this respect SOPHIA provides consulting and management services, but also participates in real projects mostly in the area of Education and Training. Indeed, SOPHIA has extensive experience in the field, being involved in a number of financed projects as coordinator, or partner, contributing to the project funded research activities, involved in the development of innovative learning platforms, methodologies, and training approaches or in the project's quality and evaluation activities.

Concerning the open movement, SOPHIA is involved in several projects promoting the use of Open Educational Resources in different contexts, integrating OER in innovative teaching and/or self-learning approaches. It is not a case that a number of senior partners are professional trainers.

The need analysis conducted within the OERup! project illustrates the status quo on the current use and development of OER in adult education in Europe. Also, the purpose of the need analysis was to map existing policies on OER at a national, regional and European level, as well as to identify training needs of adult education staff in relation to the use of OER in their teaching and educational practice.

All statements are based on the results of qualitative research. Whilst making no pretence to being an extensive scientific study, this report provides a useful overview of the current situation. For ease of reference, in many cases information is included in the form of a list with an added hyperlink, to lead to much more information.

1. Methodology

The need analysis at European level has been informed by some semi-structured interviews conducted with adult learning professionals, institutional decision makers and experts. The purpose of the interviews was to explore the point of view of selected stakeholders on the use of OER in actual educational practices and their potential for AEI.

The interviews were conducted through Skype in late March and beginning of April 2015. Several professionals have been contacted for the interviews: a CEO of an AE Institution, a professional from an Adult Learning Association, a representative of an adult education centre, a VET Centre director of training, a senior researcher in training and education, experts and professors in HE, consultants from Q&E in education companies, etc. Unfortunately only few of them answered the call for an interview, so only 2 respondents were actually consulted for the purpose of the report. Still, the interviews proved to be valuable for the analysis, because as reported below they confirmed most of the issues coming up from literature and from the roundtable discussion.

In addition to the interviewees, a roundtable workshop was organized, within the Open Education Week on March 10th, 2015 with 14 participants. The Roundtable was chaired by Fabio Nascimbeni. The scope of the roundtable session was indeed to answer few questions:
- How many AEI fully use OER today?
- How transformative is this and how it can be in future?
- How will this evolve?

And most importantly,
- what can we do to make it happen faster, better and more inclusively?

The results of the interviews and the Roundtable discussion are introduced in the report, integrating literature data with project outcomes for each section. The report presents an overview of initiative in Europe dealing with OER in adult learning; perceptions, attitudes and usage of OER; availability and quality of OER; barriers and drivers for the use of OER in Adult Education; impact of the use of OER in AEI. Lastly, since the project foresees the implementation of a training package for AEI staff to support the use of OER, recommendations are provided for the training package development.

2. Open Education: a clear policy priority in Europe

The situation of Open Education in Europe is an interesting mixture of national and regional initiatives, along with collaborations and projects working across Member states and European Union initiatives. The Cape Town Declaration and Paris Declaration each outline aspirational visions and goals for actualising the potential of OER and form the basis for what the OER movement aim to accomplish on a global scale. On 25 September 2013, the European Commission presented a Communication on "Opening up Education: Innovative teaching and learning for all through new technologies and Open Educational Resources" (COM, 2013, 654 final). The overall aim is to open education to innovative digital tools and to foster innovative learning environments and OER, in line with the Europe 2020 Strategy and responding to the emerging need to modernize education.

To support this initiative, a variety of flagship actions have been launched:

- The European Commission's Communication on Rethinking Education: Investing in skills for better socio-economic outcomes

- The OpenEducationEuropa.eu portal, aimed at supporting users (teachers or learners) in finding relevant OERs and enhancing the visibility of the many high quality resources being produced in Europe.

In parallel, other policy-relevant initiatives must be mentioned such as:http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1389115469384&uri=CELEX:52013DC0654

- The 'Policy shift' analysis for OER-related archetypes done in the UNESCO IITE paper on Alternative Models of Education Delivery

- The Recommendations from the OPAL project

- The Commonwealth of Learning Policy on Open Educational Resources

- The OER policy registry hosted by Creative Commons, a lists of current and proposed open education policies from around the world.

- The JISC/HE Academy OER Phase 3, a programme designed to expand OER in new directions, involving a significant number of stakeholders highlighting new challenges and providing fresh insights into the impact of OER and OEP on learning and teaching in a variety of contexts.

3. OER in adult education in Europe

While the adoption of OER and OEP in school education and HE in Europe is gaining ground steadily, the potential of OER in contributing to key targets has not yet been fully exploited within Adult Education, partly because there is still little evidence of how OER and OEP can be used. Compared with other educational sectors, adult learning has the lowest level of OER development. Some of the reasons for this are outlined in a recent study on behalf of IPTS by Falconer et al. (2013):

- the novelty of the concept of OER in the field of adult learning and the lack of cultural recognition that learning can have outside formal structures is a barrier;
- the institutional and teacher-directed pedagogic approach envisaged by most OER initiatives does not fit well with the needs of adult learners;
- the lack of coordination between adult learning initiatives, combined with the lack of credible forms of assessment and recognition of open adult learning;
- the lack of digital, self-learning skills and sometimes language skills of a generation of learners educated in a time when these skills were not part of the curricula.

3.1 Tensions and open issues

OER are perceived as providing a new strategic opportunity to improve the quality of education as well as facilitating knowledge sharing and capacity building. Yet is a lack of evidence on how OER are used to promote lifelong learning and adult education, even though open learning opportunities are especially relevant when considering that adult learners have high time constraints (e.g. due to job and family responsibilities) and their expectations and ambitions differ from those of traditional learners. Also, OER in Europe are dominated by resources in English and French while efforts should be done to make OER available in other languages, especially for adult learners which may be considerably facilitated by learning in their own language.

According to Falconer et al. (2013), the analysis of 150 initiatives identified in Europe revealed 6 main tensions in developing practices around OER in adult learning:

Open *versus* free

There is considerable confusion between 'free', that is with no financial cost, and 'open', which means open licensing of information and content. Resources are free to users because authors

decide to make them open and accessible through licensing. Low awareness about licensing is pronounced among adult educators and learners, increasing skepticism about the validity of OER.

Traditional *versus* new approaches

The majority of OER providers have traditional Higher Education views of teacher-directed pedagogy, out of line with the direction in which adult learning is heading. Approaches that work well in a university context may be less appropriate elsewhere, especially in AEI.

Altruism *versus* marketisation

Individuals working in OER initiatives are strongly altruistic in their motivations; however open learning initiatives are being supported by institutions primarily because of the brand recognition they create, and the importance of brand, as opposed to quality, in learner choice of resources. Brand is particularly significant for adult learners whose digital literacy tends to be low. In this sense, marketisation of OER usage and the introduction of OEP in a strategic business plan may be the key for a successful implementation of OER and OEP in AEI.

Community *versus* openness

Community-building is seen as essential for the successful uptake of OER. Communities can raise awareness, spread practice, and boost confidence. But a community can be closed, while transferring resources produced in one community (i.e a university) to another (i.e. an adult education institution) is particularly important. The open license is essential in enabling such collaboration.

Mass participation *versus* quality

The ability of the masses to participate in the production of OER – and a cultural mistrust of getting something for nothing – give rise to user concerns about quality. Belief in quality is a significant driver for OER initiatives, but the issue of assuring quality in a context where all (in principle) can contribute has not been resolved. However, this remains one of the key factors for improving the use of OER as a practice for AEI.

Add-on *versus* embedded funding

Initiatives focused on adult learning contexts tend to have more diverse funding streams than those focused on more formal educational contexts. They are less likely to be reliant on government funding and are less worried about the ongoing sustainability of their work. Funding, sustainability and survival are indeed sensitive issues for AEI.

3.2 Perception and attitudes

Talking to one of our respondent, it was clear that OER surely are a challenge for adult education, especially due to funding issues for AEI. Apart from European or national initiatives, which are not fully exploited yet, single institutions do not always feel the need to include open practices into their educational strategies. The lack of resources in national languages and of a solid strategy for the implementation of OER and OEP in adult education still have the strongest influence on AEI.

Many adult learners are not yet ready or skilled enough to welcome positively OER and self-directed learning. OER are often difficult to find, and once learners find resources, they may not be able to use them appropriately. Also, they are not able to self-assess whether the training is relevant and effective. AEI must become support agencies, where learners are guided through self-development and the use of different resources for learning, including OER. Capacity building is strongly needed, for trainers to become open facilitators of training and tutors to motivate learners. The potential of OER in adult education is enormous but training providers must be able to recognize its own contradictory nature: most of them which may benefit by using OER are not skilled enough to use them, while most of the people using OER have much less need to do it. AEI must become the structure in between content and learners: while content is freely accessible, learning must become personalized and adaptable through cooperation between adult learners and trainers/tutors. Key issues for AE will be control by the learner and teachers as mentors of learning rather than directors.

3.3 OER usage and practice

As mentioned before, more than 150 initiatives have been put in place in Europe for the development and implementation of OER and OEP in adult education. The scope of such initiatives at regional, national and european level are:

- Extend OER through collaboration beyond HE with organizations and institutions from other sectors, in order to release and/or collect OER materials that meet their identities needs.
- Explore OER publishing models, as a means to increase trust in the quality of OER materials
- Increase the use of openly-licensed materials as the basis for new resources
- Support emerging forms of learning and accreditation with OER and OEP

Indeed, AEI should most likely develop technical infrastructure for the use of OER, build a community of learners and re-adapt content for their specific context. The potential of OER for adult education institution is not only the use of new contents to integrate programs, but actually the possibility to adapt that content to the needs of lifelong learners. As for today, OER usage is more a random practice then an institutionalized one. A solid strategy is missing. Our respondents highlighted that without a pedagogic and strategic approach to offer training with OER, uptake of OEP is not only difficult neither sustainable in the long run.

3.4 Availability and quality of OER

What emerged from the analysis is a remarkable lack of OER for adult learners, the main reason being mainly the difficulty to find resources which are not in English or French: the language issue is determinant in the use of OER. Even though resources are actually available in terms of specific content, access is limited due to language barriers. Also, access is limited by the capacity of potential adult learners to find contents: experts agree on the importance of indexing, classifying and improving the findability of the OER (e.g. Open Education Europa portals) and the need to extend these measures to open educational practices, also including specific practices for adult learners [3]. The production of OER and implementation of open educational practices that take into account the needs of adult learners (e.g. flexibility, self-study, job skills) has to be promoted (Castano Munoz et al., 2013).

Quality is parallel to the issue of availability: once resources become easy to find and purpose-fit, they need to be proven of high quality. Indeed, it is not clear how quality should be achieved, especially as user reviews are seen as only moderately important. On the other hand, mistrust is a crucial issue for the implementation of OEP and the future of AEI: especially when training is provided at a cost, the quality of the learning provided is the essential factor for the survival of adult education institutions (beyond public fundings). The issue of the quality assessment is another obstacle to the uptake of OER and OEP in adult learning.

Owing to the social and decentralised aspect of open adult learning – and in some scenarios, the ability to self-direct the learning process – any central public intervention on the quality of open adult learning becomes difficult to achieve, and may not be desirable. However, in the short term, an agreed minimum set of quality criteria could be defined at European Union and/or national level, which would help to signal who are the 'trusted providers' of open adult learning. Also, assessing the quality of the learning communities and practices may be useful, fostering a combination of quality assurance mechanisms, including social mechanisms such as social rating and opinions in order to avoid disappointing learners and to stop adult learners from shunning open education.

4. Barriers and drivers for the use of OER

Overall, lack of awareness of OER and OEP, legal issues, sustainability and lack of ongoing investments are major concerns for AEI (McGill et al., 2013) while awareness of OER is generally rising (and the need for more dissemination activities is well known), strategy and sustainability are the most important current concerns. In addition, whenever content is shared and can be modified, questions arise over quality, intellectual property and copyright. During our roundtable workshop, what emerged is that most of AEI consider using OER difficult because of the following obstacles:

- Language issues: adults who enter education often do not have sufficient language skills to study in languages other than their own. Most OER are indeed in English, French or Spanish. Content should be translated but it is an exercise trainers in AEI are still not willing to uptake;

- Technology readiness of Adult Education professionals and the lack of appropriate ICT support for learning. Also, most adults do not feel comfortable and confident with ICT tools and do prefer traditional forms of providing training;

- Novelty of the concept. The concept of OER, Creative Commons and licensing in general is new and confusing, and stakeholders and users find it difficult to understand the potential. Among the academic teaching staff who might engage in collaborations and help develop quality OER for lifelong learners, Open Resources are often viewed as a threat to teachers and their professionalism and to educational institutions, and of no immediate financial benefit.

- Low perceived quality of OER;

- Lack of OER-based business models;

- Additional effort: managers and trainers in AEI are interested by OER and OEP but once they realize they have to put efforts and time to search and adapt materials, they lose interest; the lack of motivation is surely a barrier;

- Lack of cultural recognition that 'learning' can take place outside formal structures;

- The resistances of trainers which still rely on traditional education and are not willing to engage in reusing and remixing contents, at the basis of the open practice concept.

Another aspect which was discussed during the roundtable workshop was that being Open Education still a quite new phenomenon, contextualization into new sectors (others than HE where it started) is still hard and takes time. Moreover, in AEI there is an urgent need for trainers tutoring learners into educational paths. It is clear nowadays that there is a high production of resources which are free and available, but not enough educators remixing and adapting content for specific contexts. There is a remarkable lack of incentives for educators to adapt materials. "*I have spoken with HRD managers of global companies,*" said one of our respondent *"and they were interested at first but then once they realize that they have to put in time into modifying materials to fit their needs, they lose interest. I am told that there is no manpower to do that*".

According to Open education 2030 (Castano Munoz et al., 2013), there are two key **challenges** that emerge from current trends in adult learning and may be able to create new opportunities:

- **Guidance and inclusiveness:** Learning opportunities that emerge in a completely unstructured learning context, require autonomous and self-directed learning. Regardless of

the abundance of open resources available online, not everyone is able or motivated to use them. It is important for adult learners that support and guidance continue to exist during learning, to be able to benefit from new training opportunities (Castano Munoz et al., 2013).

- **Learning goals and recognition:** some learners are free and able to decide on their own learning goals; for instance, out of personal interests. Others might embark on learning to meet labour-market needs and might require certification. In this case, there is a need to demonstrate the achievement of certain goals. Some ways – such as peer recognition, peer endorsement, open badges – respond to increasingly informal learning practices. Indeed, Open adult learning must find a way to offer transparent and recognized mechanisms that allow the acquired skills to be documented (Castano Munoz et al., 2013).

On the other hand, we have asked our respondents to point out possible **incentives and drivers** for the implementation of OER and OEP into the education of adults. Among others, respondents highlighted:

- Simplicity and easy implementation of the OER idea into the learning culture of professionals and learners for adult education institutions
- Increase motivation to resume and remix open content
- Broadening and enriching the learning offer in terms of language opportunities and learning objects more adaptable to the contexts of adult education
- Enabling and promote collaborative projects, nationally or internationally
- Increase accessibility and findability of resources
- Multiple format and use of plain English
- Online platforms which are accessible via various devices allowing learning in different settings

All in all, facilitators for the uptake of OER and OEP in adult education institutions are: easy and immediate discoverability of resources, content fit for the purpose, easy view and download of content, quality assurance = clearly the biggest users enablers. Indeed, trust in an organization as a whole may be also an important criterion for learners to assess the quality of one or another particular resource and feel confident in the training provided. Organizational brand together with a firm strategic plan may be more important than other factors.

Together with these practical aspects, it is fundamental to change the learning and educational paradigm. One respondent said: *The more contents become accessible to all, the more education become practice-centred. Education starts with the implementation of a learning path, with the customization of the learning experience. AEI must become support structures to accompany individuals into education, focus on the possibility of personalized trainings. Users do not pay for contents, which are indeed free and open, but pay for learning how to handle their own educational path. In the future of AEI, OER may have a key role because they open education to everyone, but it is necessary for trainers to become tutors and guide learners into the multitude of possibilities open by open educational resources and practices"*.

In the Overview and Analysis of Practices with Open Educational Resources in Adult Education in Europe (Falconer et al., 2013), respondents were asked, 'How effective do you think the following would be in taking forward open educational resources and practices in adult and lifelong learning?'. The result, which is reported on the bar chart below (Fig.2 Most effective measures for taking forward OER in adult education and lifelong learning), is that the most effective measures are: developing communities, better coordination of initiatives and integration of OER into the broader ecosystem are stand-out favourites for the way forward.
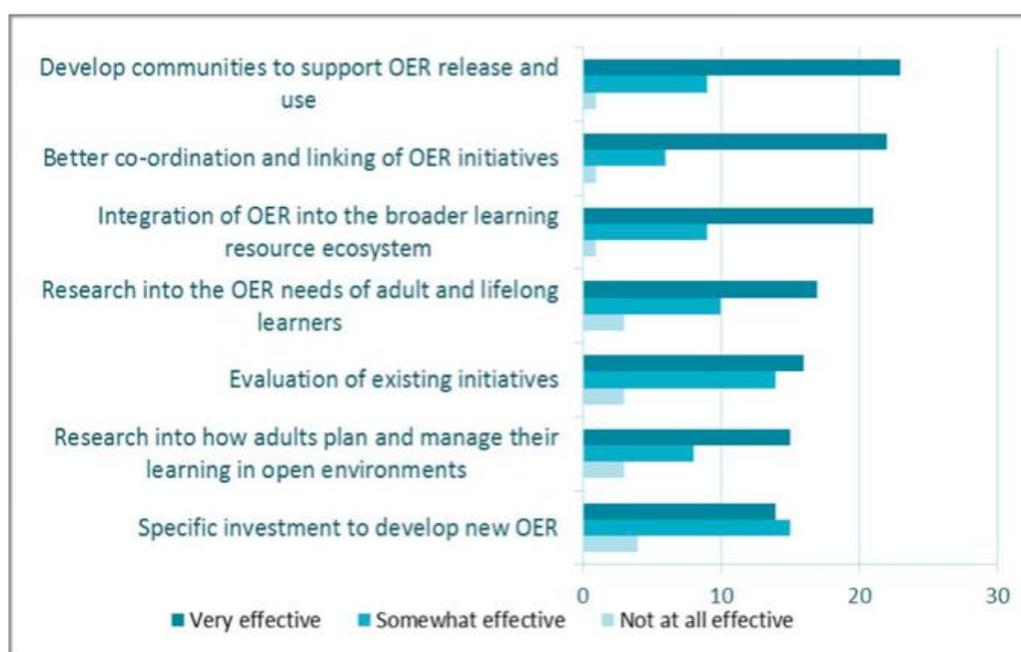

Fig.2 Most effective measures for taking forward OER in adult education and lifelong learning
(Falconer et al., 2013)

5. Impact of OER use in adult education institutions

According to a respondent, OER can open new possibilities for AEI: *"Formal ways of delivering training is something for big institutions, while smaller institutions can become more competitive offering different ways of doing training. OER may become a strength and not a weakness if inserted in a solid strategy: we are more close to people, we can introduce OEP in collaboration with our people, we can increase their trust in training with OER guiding them into new forms of learning".*

OER can help adult learners achieve their learning goals by providing flexible and accessible supplements to formal training, being more adaptable to their daily life and commitments. OER may also become a tool for trainers, strengthening their content knowledge and professional development (CC materials based on original writing of Wiley D. (2013). OER and OEP can potentially make a significant difference to education systems, but it is important to acknowledge the degree of cultural change needed to optimize their value (Falconer et al., 2013). OER have multiple strengths which can be grouped into 2 main categories (Castano Munoz et al., 2013):

1. **Open license:** providing users with free access to an enormous variety of resources, placing no restrictions on the ways these resources may be adapted and re-used to suit learner or teacher context. This is particularly valuable given the diversity of contexts of adult education and lifelong learning. Open license allows teachers and learners to experience a variety of alternative approaches, broadening and enriching curricula, improving quality and lowering the costs of curriculum development, which is very important in the perennially tight funding environment of adult education. Also, open license implies lowers barriers enabling mass participation which can spread far beyond the confines of traditional formal education.

2. **Impact: on learners**, which can benefit from the enhanced flexibility of resources, their international dimension, the freedom of access ad the skills development through re-contextualization of contents; **on OER originator**: students feedback and open review, repetitional recognition, opportunities to work cross-sectors, reaching a wider audience; **on AEI**: recognition and enhanced reputation, wider availability of training content and possibility of offering personalized learning experiences; international partnerships and collaboration with other institutions; sharing of practices; increased understanding of IPR; new relations to students which become collaborators in OER production, release and use.

However, the effort required for awareness-raising and supporting practice change is underestimated. There has been an assumption that the strengths of OER use were self-evident, and that once published, users would come. This has proved not necessarily to be the case, and lifelong learners largely remain unaware of open resouces. Dissemination and supporting use and practice change stand out as the main driving force for OER uptake. This links directly with the lack of a direct business model for OER. There is no direct perceived connection between developing OER and getting benefits from them: OER can seem like giving something away for nothing. It is difficult to get potential OER providers to see beyond short term problems of lack of funding (McGill et al., 2013).

6. Recommendations

This paragraph reports on the main recommendations for the development of the training package to support the use of OER for adult education stakeholders.

6.1 Need for training

AEI need specific training to be able to implement OEP successfully and develop focused and sustainable strategies to "get open". Initiatives in Europe such as OERup! need to stimulate interests in AEI staff and motivate professionals to the use of OER. Contextualization is as well important. Adult learning professionals work closely to adult learners and can better understand their needs.

6.2 Content of the training

The OERup! project intents to create a Training package for AEI. Within a blended-learning format, educational professionals and staff and managers of AEI will be trained in reusing, revising, remixing and redistributing OER. At the end of the training period, the OERup! project team expects that AEI staff will know more about OER and OEP and therefore will be more sensitive to the benefits of open practices in adult education. Also, managers and training directors will be more informed about initiatives and communities nationally and internationally, increasing the possibilities for the development and implementation of a strategy for OER and OEP into adult education practices.

Some important recommendations came out of the roundtable. First, one of the participants underlined the necessity to give trainees guidelines on where to share their materials: it is of particular importance not only to teach people but to involve them in the production and remix of resources, showing that it is possible, interesting and fruitful. Second, it was pointed out that it is important to provide professionals of AEI with a firm strategy, along with teaching about OER and OEP. Without a clear understanding of *what to do with OER into adult learning* it might be less effective to teach them *how to use OER.* On the other hand, professionals working on AEI are the best ones to design and evaluate a strategy for the uptake of OER into adult education, but they cannot do so without understating the key aspects of open content and practices.

6.3 Ways of organizing learning

As reported on the Euridice Report, he delivery of adult learning programmes through online portals, may not only be accompanied by the support of tutors but may also offer physical spaces beside the virtual classroom. The most effective format is blended learning, namely providing non-formal education through physical spaces with computer equipment and internet connection, and a virtual study and communication environment where the learning process is also guided by a tutor.

A key aspect to take into account when organizing learning is the recognition of the value of adult learning: it is necessary to recognize the competences acquired through open adult learning through some specific actions. These actions must be discussed and analysed by AEI staff and professionals, and include into the training package proposed.

7. Conclusions

From what emerged in the desk research, the interviews and the roundtable workshop, we can conclude that the implementation of OER and OEP in adult education is surely a challenge. The learning culture is not always developed enough to positively welcome the introduction of OER and Open Practices. Most learners still prefer traditional ways of delivering training, they prefer to be guided and motivated during learning, they have more trust in formal education. One of our respondents clearly pointed out which conditions are absolutely necessary to make OER and OEP a real possibility for AEI:

- ● ICT tools compatible with adult learners preferences and support for the use of ICT tools;

- a business plan which make AEI survive with the use of free resource, especially for small institutions and organizations;

- clarification and recognition of activities done with open resources and open materials;

- training for trainers, which need to become not only trainers as such but also facilitators of learning, guiding adults through learning with OER

- a solid strategy to increase trust: OER will allow AEI to provide adults with less-costly courses (because based on free resources) but still maintaining a high quality of learning.

Indeed, while negative views of open practices are still the case for many, this is rapidly changing with tutors and managers becoming more receptive to open practices and using technology for learning. The shift in attitudes is a major opportunity. Some measures are indeed needed (Castano Munoz et al., 2014):

- **Inclusion =** guaranteeing the participation of all individuals in open adult learning.

- **Overcoming the localisation and language barriers** to access to the resources.

- **Encouraging individuals to take control of their own learning**, with appropriate advice and guidance, fostering innovative practices for personalised and adaptive learning.

- **Guaranteeing the availability of OER and OEP for lifelong learning and AEI** = the lack of specific OER for adult learning has been noted as a trend; it is necessary to organize, support and foster the production of OER for adult learners.

- **Guaranteeing the quality of open education**, identifying trusted providers, assessing the quality of the learning communities and practices, supporting the production and diffusion of a combination of quality assurance mechanisms (institutionally and socially based).

- **Improving the social and institutional perception of the value of open adult learning.** Changing mind-sets and recognizing that learning outside formal contexts is a key issue in achieving full implementation of open adult learning.

- **Sustaining the open adult learning system, exploring (and implementing) new business models**. This will reduce the weight of public money in the provision of open education and make the initiatives more sustainable.

- **Stimulating the demand for OER: a**nother necessary step towards making the open adult learning system sustainable is ensuring that it is useful and used.

At a policy level, recommendation to EU states may imply first of all the recognition that "learning" takes place everywhere, not just in formal educational institutions. The idea of learning must be broadened to encompass activities outside formal education, and grant them recognition, assessment and relevance. Second, the promotion of digital literacy, language skills and self-development skills are pillars on which build OER uptake. Learners need to have sufficient skills and confidence to plan and direct their own learning. Along with that, efforts must be made to achieve higher visibility, discoverability and accessibility for OER through coordinated development of digital infrastructure and shared standards; this can happen only through collaboration between European states and institutions for OEP implementation.

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