Summary Report of OERup! Need Analysis

Open Educational Resources uptake in adult education
About OERup!

The OERup! project takes up the need to promote and foster the successful implementation of OER (Open Educational Resources) and OEPs (Open Educational Practices) in adult education in Europe in order to widen participation in Open Education.

The main objectives of the project are to:

- Identify the status quo of OER use in Adult Education Institutions (AEI)
- Raise awareness around the value of OER & OEP
- Create a quality framework of OER & OEP
- Improve digital skills of educational professionals and set in motion a new culture of Open Education
- Support AEI’s in developing and implementing a sustainable strategy for their Open Educational Practices

OERup! addresses with its activities primarily decision makers and educational professionals of adult education institutions as well as relevant policy makers. An online platform and a Google+ community has been established to share OEP experiences and to provide all practitioners with the training package and guideline for AEI, a quality framework and the status quo analysis of European regions that is being developed throughout the project lifetime.
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I. Introduction

The development and use of Open Educational Resources (OER) have been discussed, analysed and perfected over the past 15 years throughout Europe and beyond, and therefore the immense potential of open education practices (OEP) and OER for our society cannot be denied and is an inevitable process in future education. With the EU communication “Opening up education”, the European Commission (2013) sets out an agenda for stimulating high-quality, innovative ways of learning and teaching through new technology and open educational resources. But for all the recognition of the value of OER by a group of experts and on the political level, the idea of OER and its full potential can only unfold if all individuals - education institutions in the front line - are open to learn and contribute anytime, anywhere, with the support of anyone, using any device. Even though the use of OER in the education sector has grown, they are so far only used by specific education sectors (especially higher education (HE)) and often only for specific disciplines (e.g. ICT).

Also, as outlined in the study “Overview and Analysis of Practices with OER in Adult Education in Europe” (Falconer et al., 2013) adult education institutions (AEI) in Europe still look at the development and use of OER from a distance and take up a rather opposing attitude to openness in education. The OERup! project matches the recommendations of the report and tackles the following shortages:

- Lack of awareness of OER, its recent developments, aim and benefits as well as a missing understanding of interconnections between different forms of open and flexible learning: Teachers use ICT tools to prepare their teaching, but do not profit from the benefits of sharing and creating content with different colleagues and learners.
- Resistance to build upon existing OER content due to a lack of trust in the quality of OER in general as well as in its tools. So far most
- OER content for adult learning is being produced by HE institutions, even though the contribution of staff and teachers of all AEI would be of great value, particularly when it comes to developing forms of assessment and credits that are appropriate to lifelong and workplace learners.
- Lack of knowledge about how to take up OER content successfully. Among OER practitioners, and even among the public, there is a considerable misunderstanding of the terms ‘free’ and ‘open’ as well as very little importance dedicated to intellectual property rights and copyright issues.
- Institutions and their staff need to be better informed and able to contribute to raising awareness concerning topics of licensing, for example.
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- Lack of experience by educational institutions with commercial business models integrating OER. Only if educational institutions change the framework conditions in which they operate they will grasp the opportunities that ICT provides.

Therefore OERup! takes up the need of promoting and fostering successful implementation of practices with OER in adult learning institutions in Europe, with the aim of raising awareness of the value to be derived from OER, as well as supporting an OER-friendly environment in education institutions to widen participation in Open Education.

This report presents the results of a need analysis carried out in the partner countries and at EU level, which serves as basis in the development and testing of a training package consisting of a blended-learning training concept and material on the topic of OER, addressing European AEI (its management, staff and teachers). The training package will inform about the general principles, and new developments of OER with a special focus on pedagogical concepts on how to integrate OER production and use in the lessons plan, take up necessary specific tools and skills needed to create OER, and explain on the basis of practice examples how OER can be successfully integrated in the business concept of an AEI.
II. Methodology

The OERup! Need analysis is a result of four regional (Germany – Baden- Württemberg; Spain – Catalunia) and national (Romania and the UK), as well as a EU analysis, conducted by the five project partners. More than 50 adult learning professionals and institutional decision makers participated in the need analysis which was structured in the following phases:

Stakeholder mapping

The first step of the regional analysis identified relevant regional stakeholders from public as well as from private adult learning institutions. The selected stakeholders were invited to participate in the regional analysis phase to express their needs, experiences and benefits in the use of OER for adult education.

Desk research

The aim of this stage was to identify current papers, studies on the OER uptake in adult education in the different partner countries as well as at European level, and to identify already existing good practices on OER use, produced in the adult education field.

Interviews

Semi-structured qualitative interviews were conducted with relevant stakeholders from the adult education field to identify their current use and development of OER and their specific training needs in relation to OER development. An interview grid structured on two components – implementation of OER and training needs – that consisted of nine questions was distributed to participants prior to the interviews. In total 31 interviews were conducted during December 2014 – April 2015 via Skype, telephone or in person.

Roundtable workshops

The workshops were organized with relevant stakeholders from the adult education and higher education field, as well as stakeholders at policy level dealing with the OER issue, to discuss the already identified trends, needs on OER uptake in adult education in the different partner regions and at European level. The purpose of the workshops was also to receive feedback on the quality criteria for the development of the training package. The workshops were organized during February – April 2015 (face to face or online webinar) and a total number of 51 stakeholders attended in the partner countries.
All statements in this report 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.
III. A European perspective on OER use for adult education

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”. 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.

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.

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
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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.
IV. Results of the Need Analysis in the OERup! consortium

4.1. Germany - Baden-Württemberg

4.1.1. OER for adult education in the regional/national context

The topic of Open Educational Resources has been taken on in Germany rather slowly, compared to other OECD countries. So far, most significant approaches have arisen in the field of school and higher education, while the discussions around adult learning play a more marginal role. The following paragraphs outline the development evolving around open content in education in Germany as a whole, pointing out Baden-Württemberg initiatives, where they can be found.

First approaches were single grass-root projects, initiated by individual teachers, and open declarations of interest by actors of the education sector. All of which acting on their own efforts, and not being centrally organized. Open Content Baden-Württemberg (www.opencontent-bw.de) was one of the pioneer initiatives, which released the “Stuttgart Declaration” in 2007. In this declaration, 14 signatories claim to sensitize the broader public, relevant institutions, and policy makers of the topic, and to support the broad implementation of open content projects (www.lmz-bw.de). Another example is “ZUM.de, Zentrale für Unterrichtsmedien im Internet e.V.”, an online platform founded by teachers in Freiburg in 1997 to create and disseminate educational resources (for school and adult education). All of its content is licensed under creative commons from 2008 on. Unfortunately, successful projects remain single initiatives or as in the case of the Stuttgart Declaration, peter out without any considerable impact. Top-down support from federal or state government is not in sight at this point.

Eventually, in 2011 the so called “Schultrojaner” (School Trojan) incident triggered a heated nation-wide debate about open content: The State Ministries of Education had reached an agreement with educational publishers to search school computers for copies of educational resources violating copyrights (www.wikiversity.org). In the interest of OER supporters, the agreement was called off due to public protest, and the topic has gained a broader audience. At the same time diverse practitioners of education use this gained impetus and found the project “Freie Bildungsmedien” in the aftermath of the EduCamp at the University of Bielefeld. The project sets its goals to standardize OER in German-speaking regions and initiate discussions about the pros and cons of a centralized platform (Dobusch et al., 2014, p. 7).

The federal government showed first engagement in the topic in November 2012. The Federal Ministry of Education and Research in cooperation with the conference of ministers for education initiated the first expert meeting about OER, inviting representatives of higher
education institutions, publishers, and NGOs. Most important aspects of this meeting were on the one hand the acknowledgement of the advantages of OER as sensible supplement to traditional resources, and on the other hand the critical points of quality assurance, copyright issues and business models for publishers of educational resources were stressed (Dobusch et al., 2014, p. 7). Further, three studies* around these topics have been commissioned within this framework.

The Open Education movement in Germany seems to be on the way up. To name a few among many other initiatives and relevant players: Wikimedia Germany, Creative Commons Germany, and the Open Knowledge Foundation play a very important and active part by organizing the first successful OER conferences in Berlin (2013 and 2014) or by co-founding the Free Education Alliance “Bündnis Freie Bildung”. Furthermore, the Federal Agency for Civic Education has been showing engagement as public institution since 2010 in a practical manner by creating a discussion forum and lab environment around OER on their platform werkstatt.bpb.de. In Baden-Württemberg, important players are, for example, the Baden-Württemberg Cooperative State University (DHBW) participating in European OER projects such as Open Educational Ideas (www.idea-space.eu), as well as the Leibniz Knowledge Media Research Center (www.iwm-kmrc.de), which offers an open online course on the topic OER and runs the portal e-teaching.org, where information on OER can be found.

Up until today the entire process is defined by a clear bottom-up approach, pushed forward by the commitment of single actors and initiatives of civil society. Even though first positive steps have been taken by public authorities, OER supporters still demand of them stronger involvement in order to ensure a sustainable and nationwide implementation of Open Educational Resources and Open Educational Practices. In February 2015, the Free Education Alliance (“Bündnis Freie Bildung”) publishes its policy paper stating the need for a clear strategy, sustainable structures and conditions for the support of OER (Albers et al. (Free Education Alliance), 2015). Hopes are now being pinned on the fact that for the first time, the federal budget foresees means explicitly for Open Educational Resources and learning software (Esken, 2014), as well as in the commitment and formulated recommendations for next steps, published by the working group on OER from the Federal Ministry of Education and Research in cooperation with the conference of ministers for education (BMBF, 2015).

In terms of content, initiatives and discussions that have been held have a strong focus on school education and higher education. Main emphasis lies on the questions of quality assurance, financing, how to integrate existing infrastructures and players of the German

* Blees et al. „Handlungsfelder, Akteure und Entwicklungsoptionen offener Bildungsressourcen in internationaler Perspektive“, Till Kreutzer „Open Educational Resources, OpenContent und Urheberrecht“, and Ziedorn et al. “Metadaten für OER”
education system (platforms, publishers, etc.) and how to sustainably mainstream Open Educational Resources and Practices among educational professionals. Most of these questions play an important role for adult learning as well, nevertheless the particular realities of this sector of education, for example the issue of business models for adult education institutions and professionals, and the strong lobby of publishers and business around further education have been rather disregarded.

The year of 2015, however, seems to forecast that this gap in the debate will be closed. Goaded by the experiences made in higher education but also due to the growing demand of relevant practitioners, the topic of OER in adult learning makes itself heard. In May 2015 the first whitepaper on OER in adult education will be released. Further, the Bertelsmann foundation, in cooperation with other players, plans to launch an OER platform (probably by the end of 2015) explicitly including resources for adult learning. Significant engagement on the part of state governments (Länder) cannot be recorded yet.

\textbf{4.1.2. Current implementation of OER in adult education in the regional context}

\textbf{a) Perception and attitudes}

The topic of Open Educational Resources in general is perceived with curiosity but also strong scepticism. Actors of adult learning are insecure about the meaning of the terms in use and mistrust the claimed benefits. Concerns are: “\textit{doesn’t it mean more work for teachers and trainers, for which they have to sacrifice more of their free time?}”, “\textit{who profits from open content online? I don’t want to lose control over who I am supporting with my work?}”, or “\textit{if our offer is available online free of charge, who pays our bills?}” Many concerns, however, are not OER specific but seem to show a precaution associated with new developments like digitalization in general.

Nevertheless (or maybe because of that), there is a strong interest in finding out more about the topic and the philosophy behind. Most interviewees have heard of Open Education and are intrigu ed to learn about its benefits.

\textbf{b) OER usage and practice}

In general, it can be stated that the majority of the developed material is not licenced under creative commons or uploaded on relevant platforms and therefore does not fulfil the criteria of OER to be reused, revised, remixed, and redistributed.

Concepts of open education play a considerable role in the didactical methods of adult learning professionals. But Open Educational Resources are deliberately being used for this
need analysis

Most teachers and trainers claim to have always been developing their material, or parts of it, themselves. Within this process they include single elements, which they find online (pictures, videos, etc.), into their material. But only in rare occasions final products are being openly shared in return. Sharing or revising and mixing educational material only takes place within small, hence “trustworthy”, environments among colleagues of one institution and friends, or within the context of a project related cooperation among learning institutions which secures an immediate win-win situation.

c) Availability and quality of OER

Educational professionals look for material online (via google search, for example) and state that they do not find Open Educational Resources and do not know any respectable platforms that could ease the search for them.

A variety of platforms offer to publish, sort, search, discuss and create educational resources in German. Operators and authors of these platforms and its content are either very committed educational professionals themselves or public and private initiatives. Concerning school education, federal and state server, Elixier for example (www.bildungsserver.de/elixier/), play an important role.

The execution of spot checks have shown that some of these platforms have Open Educational Resources in their portfolio but only in very small numbers, and even less for adult learning purposes. Examples like zum.de, which offers all of its content under a creative commons licence, are very rare. In addition, OER seem to be not sufficiently marked as such and are not provided with the relevant metadata. Therefore these resources cannot be used without reservation and cannot be found via common search engines. Educational professionals also criticize the lack of available resources in German.

Due to the lack of experience of educational professionals and institutions in working with OER, a general statement concerning quality cannot be made. However, many interviewees seem to be suspicious concerning the quality of open content. Being asked the question for quality criteria, most of them stated that a known and reputable source is an important indicator. One manager of an adult learning provider states that they have a system in place according to which they assess the resources they use, no matter if they are open or not.

d) Barriers and drivers for the use of OER
Barriers to the use of OER evolve around the following strongly associated points:

First of all, there is a lack of basic information concerning Open Educational Resources and Open Educational Practices. The majority of actors in adult learning are not yet familiar with the terms in use and the benefits deriving from them.

Strongly connected to this lack of basic information is the fact that many actors of adult education are reluctant to participate in Open Education. If we look at education practitioners there still seems to be a considerable lack of an “open educational culture”. They have to be willing to release the content they produce and the responsibility linked with it. But many only see that they have to “give up sovereign rights”, and the benefit of having the opportunity to use someone else’s resource in order to mix, create and develop it further is being overlooked.

The state of the art of the quantity of Open Educational Resources online is another barrier. Interviewees criticise that, at the moment, it takes too much time to search for reliable open content online and to adapt it for their own purposes (“In the meantime I could have produced material myself”).

One more barrier concerns economic aspects. In adult education in particular, learning providers, trainers, auditing agencies for specific certificates, and publishers have a strong business interest in selling content, and therefore controlling resources. But also specific learning formats of trainers and institutions are part of their business concept, which, as a result, they do not want to share with their competitors. Sustainable business models, which consider Open Educational Resources and Practices, are missing.

Furthermore, there is no considerable support from public authorities concerning the uptake of this topic in adult learning. Also, the adult learning scene is very diverse and heterogeneous, compared to school and higher education, and therefore difficult to grasp. Any attempt to find general supportive structures or frameworks that could lead to a broad implementation of Open Educational Practices is not an easy task.

Drivers for the use of OER are threefold:

Firstly, the increasing implementation of new didactical methodologies and open learning practices leads to a natural demand for Open Educational Resources. Interviewees that have already tackled the issue of creative commons licences, for example, clearly express their appreciation of a legal solution concerning the topic of copyrights.
Secondly, values concerning **social responsibility** that derive from Open Education are recognized by actors. In particular by those, for which these values play a paramount role compared to business interests (e.g. state and church supported institutions).

And finally, **positive economic aspects**: In terms of marketing, for example, the benefits of the modern and innovative image of Open Educational Practices play an important role, as well as the opportunities for an extensive brand communication, which has been stated by some interviewees.

### 4.1.3. Recommendations for the development of the training package to support the use of OER for adult education stakeholders

**a) Need for training and recommendations for training content**

The need analysis shows that there is a definite need for training addressing educational practitioners and activities to raise awareness for policy and decision makers. Well directed training and activities may ensure the uptake of OER and OEP on a sustainable, nationwide and long term basis, by pointing out the added value of Open Education, by providing the relevant tools and skills to reuse, revise, remix, and redistribute OER in a very practical way, and by provoking a sense of entrepreneurship an project development for Open Educational Practices.

The training should cover the following **basic information** and **practical advice** concerning Open Educational Resources and Open Educational Practices.

- **What does ‘open’ stand for? What is the definition of ‘resources’ or ‘practices’ in this context?**

Educational practitioners but also institution managers and educational policy makers need to be aware of the meaning of the terms in use, its scope and the philosophy behind it. The material and information for this very basic but crucial knowledge can easily be used from the higher education and school education sector, where it has already been gathered. Approaches where OER and OEP provide a clear added value in new teaching and learning methodologies need to be introduced.

- **Where do I find open resources and how do I identify them?**

The training content needs to provide information on existing repositories with reputable resources, but also point out sources where open content as elements for educational resources can be found (e.g. pictures, icons, audio files, etc.). Furthermore, participants of the training have to be informed about the different open licences, and learn how to assess the usability of the resources they find.
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- How do I label my own resources according to the parameters of OER?

In order to ensure that more good quality OER circulate, training participants need to learn how to produce, reuse and further develop OER. This includes the following training elements: how to select and use suitable open licences, how to equip all resources with relevant metadata, and how to ensure accessibility (e.g. usability concerning different devices, formats, and languages).

In addition, the training needs to emphasize success stories of Open Educational Resources and Practices in adult learning. Besides pointing out some of these success stories, activities and the execution of the training should contain strong elements of openness, so participants could have an immediate experience of the benefits of sharing.

Furthermore, and most specifically for a training concerning practitioners on adult learning, the development of new business models that include OER in a sustainable manner needs to be support within the training. Participants have to be equipped with tools (guidelines, project plans, etc.), methodologies (stakeholder analysis, etc.), and first ideas that help them to develop their own OEP. Again, experiences already made in higher education, for example, should be made use of.

Since most OER are digital, media savvy could be included in the training to some extend as well. In addition, it is important that all tools, or platforms that are being introduced for the production of OER and OEP, meet the needs and abilities of adult education practitioners.

Finally, the training needs to spotlight relevant forums, communities or platforms, where future developments concerning OER and OEP are being discussed, for anyone interested in the topic to stay informed.

b) Format of the training and ways of organizing learning

Interviewees preferred a blended learning approach consisting of:

- flexible web-based units with mostly informational content
- face to face working sessions to share experiences and developing ideas and strategies for OEPs (mostly interesting for people working in the same context)

In terms of sequence and emphasis, prospective participants ask for a large part of expert input, which needs to be given before any collaborative exchange of experience or practical group work can be done. The adaptation and integration of learning input into their individual context needs to be piloted over a longer period of time.
4.2. Spain – Catalunia

4.2.1. OER for adult education in the regional/national context

The introduction of Information, Communication and Technology (ICT) in education has started to change the context for adult learning considerably however this is still in the early stages and the future could be shaped in different ways (Falconer et al., 2013).

In particular, the opportunities offered by OER to extend knowledge and promote a global level (formal, non-formal and informal) learning throughout life (OECD, 2008) are particularly interesting in the case of adult education given that “adult learners have different time constraints (e.g. due to job and family responsibilities) and their expectations and ambitions differ from those of traditional learners” (Castaño et al., 2013).

The open education movement has started strongly, although lately it seems to be slowing down according to one round table participant who argued: “Currently, although OpenCourseWare still active, have lost steam on the movement of the MOOC², which are perceived as the new format of OER. And although the information can be read in many ways, OpenDOAR³ shows that learning objects’ repositories have recently stuck”.

In the national context, according to the experts there are "many initiatives" on OER. These initiatives are often "projects" or "individual [teachers] or institutional". Few initiatives are promoted by the government. Some highlighted initiatives target diverse audiences such as: teachers in primary and secondary schools, young students, families and lifelong learners. They are primarily intended to provide resources in repositories⁴. A selection of these initiatives is gathered within the Annex.

However, the panorama is more diverse. An analysis of the OpenCourseWare (OCW) consortium partners, one of the most widespread Open education initiatives in Higher Education, reveals that in relation to EU27 member States there is a strong presence of Spanish universities. Here are some examples⁵:

- Universia. The network is made up of 1,1000 Universities located in 15 countries (Spanish-speaking). The initiative consists of 12 websites, one for each country, and another global site which offers information and contents from across the network.

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² Massive Open Online Course (MOOC)
³ See http://www.opendoar.org/
⁴ See: http://poerup.referata.com/wiki/Spain#International.2Fnational_OER_initiatives
⁵ See http://poerup.referata.com/wiki/Spain#International.2Fnational_OER_initiatives
Universia reach out to 10.1 million students, 8 million users and 850,000 university teaching staff.

- The OCW from UOC (Universitat Oberta de Catalunya) was launched in 2008 and offers over 100 courses licensed under CC BY-NC-SA 3.0.
- The OCW from the EHU (Universidad del País Vasco) was also launched in 2008 and its contents are licensed under CC BY NC SA 2.5 ES.
- The OCW from the UPM (Universidad Politecnica de Madrid) offers over 80 courses under a various range of Creative Commons license.

These are the most remarkable ones, but almost all universities have their own OCW.

There is also in Spain a strong component to a Spanish-speaking international context, mainly Latin America. This is the case of the OportUnidad project, which aimed to help strengthen and sustain the common area of higher education in Latin America and the European Union, through the increased use of open educational practices and resources (OER & OEP).

As some of the experts stated, Spain is increasing the presence of MOOCs which universities see, for the most part as a marketing strategy for their own programmes. There are different Spanish-speaking MOOCs on offer, some of which are included in the most known international MOOCs platforms (Coursera and Miriadax) and others offered by the universities themselves: COMA from UNED, AbiertaUGR from the University of Granada, Crypt4u from the Universidad Politécnica de Madrid, to cite some examples.

The initiatives and projects that are taking place in the Spanish area are primarily aimed at young people and college students, something that is remarked by the OECD latest survey entitled “Open Educational Resources: Analysis of Responses to the OECD Country Questionnaire”.

At the same time, the potential of open education and OER to support adult learning has not yet been exploited widely (Castaño et al., 2013:173). As Castaño et al. (2013) evidences, compared with other educational sectors, the adult learning sector has the lowest level of OER development (Minguillón, Rodriguez, & Conesa, 2010). This research concludes that one of the reasons for this is 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 (Falconer et al., 2013).

A report by the OECD (2007: 20) states that "to take advantage of the opportunities offered by OER, institutions should create incentives for their faculty members to participate in this
initiative, as carrying out the development of curricular material with at least one OER element as part of the process of consolidating its teaching position. The use of OER in education should be encouraged and training must be offered."

Another key aspect is the lack of leadership at a policy level. Indeed, despite the number of initiatives at different educational levels and across the different autonomous communities, there is currently no legislation that covers this area or provides a common definition. In that sense, a PIAAC publication states that “While countries cannot change the past, policies designed to provide high-quality lifelong opportunities for learning can help to ensure that the adults of the future maintain their skills” (OECD, 2013, p.13).

Despite this there is a long way to go; experts stated that there is general agreement that adult learning by 2030 will be able to take advantage of an abundance of learning materials including OER, produced in multiple and collaborative ways, offered by many different providers and players, and used/reused by learners, enabling strong personalization of the learning processes (Castaño et al., 2013, p.183).

4.2.2. Current implementation of OER in adult education in the regional context

a) Perception and attitudes

In general, educators and institutions agree with the concept of open movement. According to the interviewees, teachers “feel comfortable” with OER. OERs are considered as “interesting” and, specially, “useful”, as stated by one of the teachers interviewed: “when I found OER I attempt to take advantage of them”.

Institutions’ managers considered OER as an important part of an educational public service: “If one institution is public (not privately founded) it provides services to a vast and different number of people, so its resources need to remain open”.

Both teachers and managers value specifically the availability of resources in order to adopt contents. As stated by an interviewee: “The availability of OER as well as materials created by teachers are crucial in order to provide content to online courses”.

Another interviewee shows how OERs can become a resource to supply the lack of materials in adult education: “because there are not specific materials for adult education, teachers have to look for other resources”, “for example, web material developed for schools are very useful to carry out literacy activities for adult learners”.
In addition to **providing content**, OERs are considered as a good choice in order to “facilitate materials for teachers, collaborators...”

### b) OER usage and practice

The major part of the available OER is created **by teachers**. Educational institutions and associations contribute by providing platforms or promoting specific initiatives. In some cases, OERs are institutionally created, for example, the Catalan Government provides materials for secondary education.

When choosing the OER, teachers try to use **different formats**: “images, videos, animations, tutorials, interactive activities, interactive maps, multimedia presentations, etc.”

The most common action with OER is “to search for materials” for its direct use; sometimes, teachers adapt OERs based on their specific needs. In some cases, they create resources but they frequently miss the last step: they don’t publish what they create on the Internet. As an interviewee stated: “I use the three options [use, adapt, create]. I search for open resources and I share them with my colleagues. At the same time, within the subjects I teach, I create materials that are available only in my classroom. However, they are not published”.

Regarding the types of practices with OER, the most common situation is its use as a **complement or support**. As a teacher states: “In general, OER are more used as a complement, taking advantage from digital whiteboards, than as a core material”. The “official resources are used as a basis” or as a starting point for the work in the classroom: "A general example: materials "graduate school" created by the Government are oriented courses in Bachelor of Secondary Education. In this case, an offer that was "official" can serve as a basis for other learning and teaching activities”.

### c) Availability and quality of OER

Regarding the access to OERs, most interviewees and experts agree that “they are difficult to find: it takes a long time and you need to be pretty sure about what you are looking for". They highlight that “there is not a specific database or standard keywords to find them”.

The most common strategies to search for OERs are, according to participants involved in the need analysis process:

- Search engines as the first option. And, among them, “Google is the most used”.
- Repositories, whether they will be offered by “different governmental websites where you can find enough materials for Adult Education” or by some associations or initiatives like "educational websites where OER are clearly grouped by content,"
levels, etc. This is the case of “Tiching⁶”. These websites are a great help for teachers as the previous classification of resources facilitates its localization”.

• In some cases, they seek OER through social bookmarks; “for example, Mister Wong”.

Some criteria used by teachers in order to select OERs are:

• Language, i.e. “they are in a language that students understand: Spanish or preferably Catalan”).
• "Clarity".
• "Specificity".
• "Utility", i.e., "that fit the content to be transmitted and the educational level".
• Format, prioritizing "visual resources, containing many images".
• "Adaptability", that is, that they could edit or adapt them.

d) Barriers and drivers for the use of OER

The following barriers for the use of OER are identified:

• Quantity. Overall, respondents show a lack of OERs for AE. As one teacher pointed out: “good materials designed for adult education are not very common”. Although some resources are available, in general terms, the amount of OERs is not enough. This fact may be related to the lack of interest in adult education. Indeed, “Adult education is not attractive for editors because it is reduced in terms of quantity; that is why materials are not frequent. This causes that, traditionally, teachers of adult education had to create their own resources from various materials”.

• Quality. As an interviewee states: “The quality of OER, especially when using general search engines instead of specialized ones, is irregular. You can find acceptable materials together with very low quality resources, especially videos and multimedia presentations”. Other interviewee explains that “OER are improvable and not enough. Sometimes, you find many similar materials and no one about a specific topic”.

• Language, taking into account that “OERs are often in English”. So, many times “the problem is not to find resources, but to adapt them. Sometimes we just have to translate them because many resources are available in English”.

⁶ http://es.tiching.com/
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- **Approach.** All interviewees agreed about the OER audience. They affirm that “it is difficult to find materials for adults”; most of them “are addressed to young people”.

- **Format.** Interviewees and experts agreed on the lack of variety of the format of OERs available for AE: “we are still in the PowerPoint stage; we are not fully digital yet”.

- **Economic,** as the creation of OERs requires “economic resources from educational institutions”.

There was only one driver of the use of OERs in AE identified during the need analysis: some teachers’ attitudes and efforts to promote the use OER: the use of the OER depends on the teacher, there are some of them that has an open vision and search and uses and creates open materials if necessary. As most of the teachers interviewed stated: “In order to perform my classes, I have to search materials in the Internet that have a lot of images [for adults’ literacy], then I adapt it and add some basic text in order to teach my students to read”, “It’s very difficult to me to find materials to use with my students, so I have to invest an important part of my time and effort to create new ones according their needs”.

In addition, some areas for improvement regarding the usages of OER were identified:

- **Licenses,** considering that there is “ignorance about licenses, how to combine some resources with different licenses, etc.”

- **Openness culture.** There is not enough open culture yet. OERs are primarily used "as a complement" of teaching, not as a basis. Furthermore, most practices are carried out in closed and controlled environments: “There are institutions that have a "campus" for its participants, but they are not open but specifically for particular groups”.

**Methodology.** Open education requires a “transformation from the bottom in relation to the ways of working; the materials generated within each centre should intended to be OER, which in turn will be the focus of the training sessions. But this is not a technical training issue but a pedagogical reflection as well as educational policies from the institutions”.

- **Publication.** Although it is a key aspect for OER, "sharing OER through the appropriate repositories" is a complex practice for teachers. This happens because “they are not sure if what they are doing is the final version”.

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- **Attitude.** The attitude adopted by teachers regarding OER is diverse. Some teachers have "no interest" and make "low use of training activities designed by the centre". Other teachers are highly motivated and interested about OER, as previously explained.

- **Training.** The lack of teacher training is seen as one of the key areas of improvement. One interviewee commented that "Many teachers cannot use these resources in the classroom because they don’t know how to use ICT in the classroom".

- **Infrastructures,** both technological ("to have resources (computers, tablets...) for participants is difficult sometimes", as well as "apps that work, updated, good connectivity") and space ("some specific spaces which guarantee the access to these resources must be provided for students"). The lack of infrastructure affects both educational practices and face-to-face teacher training sessions.

- **Institutional policies.** In general, there is awareness about the need of changing the current practices but it is not usual to consider and create specific institutional policies in order to formalize, systematize and support processes. As one interviewee states: “There are not policies or strategies clear enough. Some teachers are still using the traditional textbooks while others use OER or create them if they don’t find what they are looking for”. A participant within the round table pointed out that “institutions should analyze if they can assume OER practices within the existing course models (registration requirements, teaching model, the course requirements, expected results, payment methods and certification). In this case, procedures would be reused. Otherwise, you have to establish a new training model from scratch. I think it may be ideal”.

- A participant within the round table affirmed that it is necessary to provide a "clear legal framework".

**e) Impact of OER use in adult education institutions**

Gathered data shows that the vast majority of teachers use or reuse OERs created by school teachers or university lecturers. One interviewee stated that "The use of open resources is a standard practice for most of teachers of the centre". The usual action on the OER is the adaptation of open materials to suit them in to specific needs (content, level courses, etc.). Occasionally, teachers are creators or publishers of OER.
In most cases, this use does not specifically imply a change in methodology, while in other cases it has taken this step further. One respondent added “(...) the way of transmitting knowledge has changed aside traditional models, this fact implies an autonomy of the students, a reflection on their own learning processes, attention to diversity, etc. This is critical in a centre with a teaching-learning method like ours, based on the self-made intensive use of ICT, to the extent that is currently experiencing new forms of learning, such as Flipped Classroom and new methodologies, such as Project Based Learning”. The incorporation of new methodologies involve a natural process of adoption of open education. As one interviewee stated “With the introduction of the Flipped Classroom, I had to increase my production of OER, combined with a search of materials to cover the needs of the course and in consequence it can be reused. In general, most of the materials produced are shared across the Internet, remaining available for other teachers”.

4.2.3. Recommendations for the development of the training package to support the use of OER for adult education stakeholders

a) Need for training and recommendations for the content of the training

Considering the data gathered, it is concluded that teacher training should address two key aspects:

- Digital teacher training for the use of OER available, so that teachers “can know and use all the resources available”.
- Integration into the culture of openness, which implies the need to rethink the methodology of learning and support the creation of open materials.

The key content to develop in the course is:

- **Raising awareness** in order to know the open movement and appreciate its benefits and challenges. An important consideration is to understand "the utility: Why OER? Why is it so important in adult education?: specificities of adult learners. Examples of good practice. What does it contribute to my development as a teacher to make it worth changing?"

- “**Digital Competences**”, in order to develop teaching practices in a digital environment.

- **OER Searching strategies** beyond general search engines, ie consider "which resources already exist?" Strategies to identify OER are also needed. One interviewee raised in this sense "The most important issue is the lack of a single standard of OER labelling in order to make them more easy to find. How can anyone differentiate an
educational resource from other that is not educational? Any object can be a learning object or only the ones that were developed for this purpose?”

- **Adaptation** of OER, ie "Are OER adapted to the needs of adult learners?” Considering that most teachers do not use the resources directly (since they only use them partially, the educational level of the resources does not meet their needs, etc).

- **Creation** of OERs, addressing both key elements of content (e.g. OER quality criteria) as technicians, especially linked to the formats (which should facilitate subsequent adaptation). Metadata for easy search and publication will be also important.

- **Licenses**, to use, adapt and/or create an OER.

- **Open and innovative methodologies** oriented to an appropriate use of OER and OEP. Including "alternatives to the evaluation (badges …)" of learning performed through OER that are "sufficiently flexible to the needs of adult learners, perhaps less interested in traditional certificates".

- Raising awareness of the need to create policies or initiatives that support open education.

**b) Format of the training and ways of organizing learning**

The priority is blended format, combining online training (70-80%) and face to face (30-20%).

Some ideas that emerge about the ways of organizing learning are:

- **Learner centred**, more than content centred.

- **Active, open and varied methodology**; i.e. not lectures but an own approach of open pedagogies. In this respect, the importance of peer interaction and conduct collaborative activities are highlighted.

- **Practical**. With a clear and practical application, including examples of good practice, visits to other institutions, MOOCs use, etc.

- **Flexible approach**, so it can be adapted to the needs of each participant.
• **Adapted to the needs of teachers (supporters and detractors),** i.e. their actual needs. It must also take into account the attitudes of teachers: some are very interested while others are reluctant to use ICT or include open pedagogies in their practices.

• **Trigger,** promoting lifelong learning strategies. An important aspect is "building a community that once the course finished, demonstrates spearhead in the use / creation of OER for adult education (and ensure that it doesn’t end with the project)".
4.3. United Kingdom

4.3.1. OER for adult education in the regional/national context

In 2002 the term “open educational resources” was adopted by UNESCO, an organisation that has done much to promote OER as a driver for educational change across the globe. In 2012 an historic declaration by UNESCO, following a world-wide survey, called on all governments to make all educational materials freely available.

In the UK, the idea of OER was rapidly developed by communities of enthusiasts, but was given a considerable boost by HEFCE\(^7\) in 2008 through a funded programme of development\(^8\) managed by the Higher Education Academy (Academy) and JISC\(^9\) to promote the sharing and reuse of learning resources, and to provide a reputational benefit to UK HE through the promotion of high quality learning resources worldwide. Around £16 million over three phases supported more than 80 projects, many with multiple partners across a wide range of sectors. The institutions involved experienced significant benefits and the UK HE sector as a whole has experienced increased academic reputation as a result of the work undertaken by this programme. The pilot phase\(^10\) (April 2009 – April 2010) was designed to support institutions, consortia and individuals to release open educational resources for use and repurposing worldwide, by assisting the development of appropriate processes and polices to make this process an integral part of the learning material creation workflow.

Phase 2\(^11\) (August 2010 – August 2011) built upon and expanded the work of the pilot phase around the release of OER material, and commenced research and technical work which examined the discovery and use of OER – specifically by academics. This £5million programme was comprised of three activity areas, as follows:

- The release of OER.
- The use of OER.
- The discovery of OER.

Phase 3\(^12\) encompassed a number of activities which included:

- OER Phase 3 "Themes" projects: These projects investigated how OER approaches can work towards particular strategic, policy and societal goals (October 2011 – October 2012).

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\(^7\) Higher Education Funding Council for England

\(^8\) The Higher Education Academy/JISC Open Educational Resources Programme (UKOER)

\(^9\) Joint Information Systems Council

\(^10\) OER Programme – Pilot Phase

\(^11\) OER Programme – Phase 2

\(^12\) OER Programme – Phase 3
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- UKOER rapid innovation projects: Small short technical projects funded from March to October 2012.
- Communications and dissemination work: a briefing paper for senior managers.
- Evaluation and Synthesis project: Findings from all three phases of UKOER are fully documented at the Evaluation and Synthesis wiki, managed by a team led from Glasgow Caledonian University.
- Support for institutional change: Including an institutional change academy project, support for embedding the findings from existing work and a set of projects developing materials for staff development regarding OER.

National government funding in the UK has helped education institutions, predominantly HE institutions, face significant challenges related to OER over the last few years. Funded initiatives have helped to support the development of policies that foster openness and access, adopting, enabling or encouraging in the creation, sharing and provision of educational resources; addressing organisational, cultural and pedagogical issues within an institution; and the development of well reasoned ICT strategies and clear e-learning policies that are able to deal with the opportunities (and threats) posed by the OER movement.

Institutions such as the University College London (UCL) and the University of Birmingham have been proactive in addressing many of these issues (cultural and pedagogical) – UCL made a commitment to make all of its research available online, and has released some excellent learning resources through externally funded OER projects (also as part of the Open Educational Resources Programme (UKOER)).

In 2010 the University of Birmingham and the London School of Economics worked collaboratively on the Academy and JISC funded DELILA project; the main aim of the project was to release a small sample of OERs to support embedding digital and information literacy education into institutional teacher training courses accredited by the Academy including Postgraduate Certificates and other continuing professional development (CPD) courses. One of the main barriers that the project found to sharing resources in information literacy was copyright that belonged to commercial database providers.

On a national level, the OER Wales Cymru Project showcases the best open education resources in Wales and promotes open educational practice across the Welsh HE sector in Wales. In September 2013, Wales confirmed its pioneering status in the world of OER by

13 https://delilaopen.wordpress.com/project-co-pilot/
14 http://www.oerwales.ac.uk/
becoming one of the first nations to fully embed the concept of ‘Open Education’ within a national strategy. The main aims and objectives of the project are to:

- Establish an Open Education Resources Portal.
- Establish a network of Open Education Practice Champions and Promote and Embed Open Educational Practice across the HE Sector.
- Launch an all Wales sMOOC (Short Massive Open Online Course) aimed at helping students to survive their first few weeks in University.
- Manage and co-ordinate the hosting of the international OER15 Conference in Wales in April 2015.

On both a national and international level the Open University (OU) is a world leader in the development of OERs in the field of HE, lifelong learning and AE. The OU now ensures it provides around 5% of its course materials as free open educational content every year; and over 4m learners every year start a learning journey with the OU’s open accessible materials via the free learning platform OpenLearn\[15\].

It is clear that OER in the AE and FE sectors in the UK is less pronounced than in HE however there are a number of organisations and projects that have adopted a cross-sector approach: Jorum, the UK’s largest repository for discovering and sharing OER is inclusive of FE and skills; the Institute of Education provides Lifelong Learning OERs; and NIACE continues to explore how AE providers can make best use of a wide range of learning resources that are freely available over the internet, for adult learners. Some of these resources have been explicitly published as OERs, and they include traditional learning materials and also resources such as video, audio and software. To make best use of them teachers are adopting new practices to help them locate, adapt and adopt what they find.

The UK has some of the largest OER projects in the world, including the OU’s ‘Open Learn’ as already mentioned; the UK also has an extensive commercial educational publishing sector; and along with the US and Canada, the UK is a large exporter of e-learning services. Despite this there is clearly a long way to go for the AE sector on the theme of OER, and the challenge remains to provide learning opportunities for all, especially disadvantaged groups who need them most.

4.3.2. Current implementation of OER in adult education in the regional context

a) Perception and attitudes

\[15\] http://www.open.edu/openlearn/
Perceptions and attitudes in the UK show that OER is both useful and appropriate for educational practices within the sector, and the motivation is clear:

“Our motivation is to make our resources and expertise we have more easily available to the public, but also to our members.”

It is important that OERs remain open and available as this fits with the values of many AE institutions – “that learning and accessibility to learning should be freely available to all, irrespective of the ability to pay.”

Organisations such as JISC do exactly that – they run a number of programmes to support the development of OERs, and to support provider organisations in the UK in utilising education in more effective ways, which is one of their core activities (and values).

JISC is also dedicated to running the National Repository of Open Educational Resources, a free service managed by Mimas\(^\text{16}\) that functions across the FE, skills and HE sectors in the UK. There is a clear perception however that the majority of resources are produced and distributed by the HE sector and make up the majority of content in the National Repository:

“I guess you could say at the moment that for further education and skills, about 15 percent of the resources come from the sector. The rest have been produced or uploaded in higher education... about 15 percent from further education, about 85 percent from higher education.”

For some organisations such as non-governmental organisations (NGOs) or voluntary sector organisations, OER is seen as being ‘the most useful model’ to their educational offer, especially when working with tight budgets and a commitment to collaboration and coproduction. As such it is important to build on what is already out there rather than having to ‘reinvent the wheel’.

“We recognise that those are the spaces people are going to anyway, so if we can use educational tools that link in to tools or software programmes that people are already aware of then that could have distinct advantages for us.”

On a regional level, OER is seen as having a range of benefits both for staff and the local community:

- “OER is an important way of supporting staff development in terms of knowledge and practice relating to copyright, and being able to model that practice in the classroom.

\(^{16}\) [http://mimas.ac.uk/](http://mimas.ac.uk/)
OER is an excellent way for schools and staff to promote the work they are doing and share their resources.

OER helps to fulfil commitments to equality of learning for everyone, both in local communities and further afield.

OER helps in the development of digital literacy skills.”

On a national level, recent debate in the UK has looked at how open education needs to move forward – the term ‘open educational resource’ was coined over a decade ago, so it is no surprise that such comments are appearing on social media or in webinars about how individuals and institutions have not changed.

Audrey Watters suggests that the term ‘open’ has lost its authentic roots having been hijacked by initiatives that are not considered to be open at all. ‘Open’ can mean so many different things to different people but the original underlying philosophy was always about altruism, authenticity and opportunity:

“If we believe in equality, if we believe in participatory democracy and participatory culture, if we believe in people and progressive social change, if we believe in sustainability in all its environmental and economic and psychological manifestations, then we need to do better than slap that adjective “open” onto our projects and act as though that’s sufficient.” – Watters, 2014

b) OER usage and practice

OER usage and practice is being undertaken in a variety of ways, for example at Leicester City Council OER work focuses on AE and school staff development as well as workforce development; it is also part of wider project work, in particular looking at digital literacy skills of school staff.

In other organisations such as the WEA, there are pockets of good practice however it is clear that there is an issue around OER being developed as part of a wider, strategic policy level:

“I don’t know that we have one policy position on it at the moment. I think there is a willingness and recognition that we need to be looking at this... At the moment... it’s about individuals who have the skills, the interest, the motivation...”

17 https://newsletter.alt.ac.uk/2015/02/oer-a-languising-teenager/
18 Workers’ Educational Association
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As such the WEA is developing a much more coordinated approach to the development of OERs – being part of a learning pool community and having their own virtual learning environment (VLE) they are able to draw on existing models of OER to support the development of their own learning modules which reflect the WEA’s values and approaches to teaching, learning and assessment:

“We’re very keen to look at that kind of pedagogy as online learning in terms of collaboration and communication and critical thinking and active learning and how we can build that in as much as possible within what we develop. We’re at the point of doing both...”

JISC has a very clear approach to OER; they have recognised experts in the field of open resources such as David Kernohan who works on online learning, research data management, student innovation and open education. JISC also has strong links with OER centres across Europe, and a clear policy that states that any resources produced with JISC funding must be made available through OER. JISC encourages the hosting of OERs in the learning and skills sector by linking them through NCFE19, and Curriculum Kitchen20, an awarding body which identifies resources matched to particular qualifications. OERs are also being used and shared on Jorum21 (part of the Digital Resources division of JISC), a one-stop shop for OERs.

ALT22 builds in the idea of OER right from the start when they develop resources – most of what they do is openly licensed under Creative Commons licensing. ALT also has an open access repository. In terms of practice:

“We look at the metadata really carefully of things that we publish. We try and think about the longevity. So, if we’re putting it on the internet, openly, we always try and put it into our repository so that it has got a long-term and stable URL... We name everything and date it so that people who come across it know who has written it, when it was last updated. Hopefully the metadata makes it quite easy to find.”

So we can see that there is activity, usage and practice across the education sector within schools, FE, HE and with adult learners. Many of these individuals and institutions championing ‘open’ were supported by the UKOER programme of funding (2009-2012) led by JISC and the Academy, which was instrumental in transforming the sector. Activities have grown and expanded way beyond the funding, and a passionate community exists.

19 http://www.ncfe.org.uk/
20 http://www.curriculumkitchen.co.uk/
21 http://www.jorum.ac.uk/
22 Association for Learning Technology
c) Availability and quality of OER

The availability and quality of OERs, on the whole, is variable:

“Some of the time you can come across a really well organised repository where you can find things... But most OERs can be more difficult to find because they've been written and published with a very specific audience in mind.”

Many OERs are transferable across different learning contexts and different sectors however they would have to be written with the intent that someone else will be able to use them out of context, and this poses a challenge of being able to know where to look and what to look for.

“OERs are not as available as they should be, but that’s partly because the awareness levels amongst teaching staff and learners is not as great as it should be. So I think they could be more accessible if people knew about them.” –

According to JISC, problems do not necessarily arise with the volume or availability of OERs, but instead organisational policies at a local level with regards to e-safety and e-security often unnecessarily block access to OERs, and this also comes back to the point of people being unclear with regards to licensing.

At a leadership and governance level there is a greater need for senior managers and those involved in the governance of providers involved in AE to be more aware of:

a) What open educational resources are; and
b) How they can best be used.

“It probably needs some form of explicit policy and I would guess that most adult education providers in the further and higher education sectors in the UK haven’t got those explicit policies and haven’t really explored the potential impact and value of OERs across the range of their operations.”

As has already been mentioned, many OERs have been written within an HE context which aren’t always appropriate (issues around transferability):

“Things like OpenLearn with the Open University might be more appropriate but it isn’t always tailored to what we need within our sector (AE).”

According to Leicester City Council, a big change in terms of the availability of OERs in AE has come in the form of MOOCs which have helped to raise the profile of OERs in the AE sector. This does not guarantee quality however, and on a local level Leicester City Council has looked at a number of basic issues with schools:
“So one of the things we’ve talked to schools about is... making sure that you haven’t got spelling mistakes in there, making sure things are factually correct, making sure that there aren’t any elements within your openly licensed work that you don’t have permission to openly license, and also making sure that you’re aware of accessibility checks in terms of electronic resources.”

The issue of quality is an important one – the WEA looks at access and equality issues and undertakes equality impact assessments in terms of language and images. The source and reputability of that source, and whether or not there are any references also help to discern the quality and credibility of a resource. Therefore the quality of OERs in the UK also varies, not just in content but in how they are sourced, referenced and labelled, and many people are unclear about what licensing actually involves.

d) Barriers and drivers for the use of OER

Many people lack the training, and thereby the confidence, to have the necessary skills to search for OERs as well as use OERs, and are unable to use the tools available to do so:

“They think I can use a website but I can’t – I don’t understand how a blog is different from a website or – and the same could apply to an authoring tool – I can use this authoring tool but I’ve never used that one so I’d never try to use that one.”

So there is a clear barrier, a sense of someone not being able to problem solve and critically evaluate a new tool and think how they might use that tool in a teaching capacity.

Other barriers can be more technical, for example being able to produce an OER that can sit across different platforms; how to create, share, and disseminate OERs and ensure that it builds on what is already out there rather than replicating what already exists; and not being able to create a personal learning network for example on an organisational level, so that everyone can benefit rather than working in silos.

JISC believes that one of the barriers perceived by many practitioners is not knowing where to look, which comes back to organisational strategy. OERs can be, potentially, a huge resource but a key driver to this is investment – organisations have to invest in the training and support needs of their staff in order to:

a) Learn how to locate them most effectively; and
b) Realise that OERs are rarely perfect in any given context or classroom situation, and that resource is needed to develop or adapt those resources.

JISC also has a slightly contrasting opinion to that of Leicester City Council with regards to MOOCs – JISC sees the use of MOOCs as a potential barrier:
“The idea that everything can be like a MOOC where people just plug in, or the Khan Academy, they plug into resources and take them away, I don’t think is a very useful model within adult community education.”

This is because the participative nature of adult community learning (ACL) requires a more personalised use of those resources to best meet the needs of the learner, the use and development of which is recorded so that they can be utilised in other local learning contexts. Therefore the strength of OERs is the ability for practitioners and organisations to be able to contextualise them in “very specific ways for specific learner needs or specific community needs.”

There are also cultural barriers to using OERs – on the face of it the UK is exceptionally good at producing OERs, but AE institutions on the whole are not culturally aware, or have not adapted their strategies to incorporate them. The promotion and using of OERs is a first step that the sector needs to take which will involve a major cultural shift as to how OERs are currently implemented. This needs to be a top-down approach – the government does not do enough to incentivise open licensing and the use of OERs – it’s done often through publicly funded research, and there is a real reluctance to give up intellectual property rights of resources that are created at the highest level, and this ultimately impacts on organisations’ reluctance to using OERs more widely.

“The second barrier is that people can’t find them. Many OERs are stuck in institutional repositories which aren’t indexed by the web. I think if you need to know a repository in order to find an OER, you’re never going to find it.”

Therefore although there is a strong willingness to use OERs, there is a much stronger consensus to produce them, and this imbalance needs to be addressed.

   e) Impact of OER use in adult education institutions

There are a number of significant impacts – many AE institutions, regardless of where they operate or what they do, waste an enormous amount of time and effort creating resources that are already available:

“They’re spending all their time from scratch instead of trying to refine or build on something that already exists.”

By adopting OER strategies AE institutions can:

- Save money.
- Utilise their resources more practically (rather than having to reinvent the wheel).
- Enhance their reputation by producing good OERs.
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- Enhance/ support CPD and professional development of staff, particularly for individual trainers or smaller organisations with limited in-house provision.
- Grow their networks through the development, sharing and dissemination of OERs.

AE institutions need to realise the potential of using OERs for their learners and staff – because OERs have been produced by practitioners working with learners they are already appropriately contextualised, therefore the variety and quality of OERs available to the sector can play an integral role in the delivery of learning, and also access to learning. The impact of OERs can be further enhanced by ensuring that practitioners and learners “have their specific needs identified and appropriate routes into repositories for OERs or search strategies identify resources that they can use, adapt, and pass on to the next collaborators.”

The development and use of OERs can also have a positive impact on collaboration. Lancashire Adult and Community Learning Service worked to produce British Sign Language vocabulary at the Level 1 and Level 2 qualification stage for people who have hearing loss or are working with the deaf community. The project began with a small working group which went on to produce a complete set of vocabulary videos by working in partnership with their learners, staff, and other institutions to produce what has turned out to be a significant resource. The benefit and impact of this is clear as the group has continued to work together and expand the resources that they are producing in a self-sustaining way.

“In terms of collaborative also I think I’d say it’s not just collaborative within the organisation, it’s collaborative across networks.”

By developing collaborative approaches to online learning and module development, and embedding teaching, learning and assessment approaches, the knock-on effect for learners would be that the pedagogy of online learning (collaborative online learning theory, e-moderation and discussion boards) would be built in and therefore filter down to the learners themselves and impact on their (positive) experiences of blended and online learning. This would then have the potential of filtering out further afield, influencing other learners, teachers and organisations within the sector.

This is one of the great strengths of OER – an ability to connect communities and expertise to either develop practice on an individual level, or on a group level:

“...organisations, disciplines, can really bring fresh approaches and insight to those kinds of collaborations. So it is extremely valuable.”

4.3.3. Recommendations for the development of the training package to support the use of OER for adult education stakeholders
a) Need for training and recommendations for the training content

- There is a need for training because staff have a wide range of skills (job roles and functions), abilities, confidence and competence around using technology to support learners, teaching, and school community development. Training is essential in keeping skills, knowledge and practice up to date as well as ensuring that institutions continue to evolve.
- As organisations begin to adopt OER strategies, there is a natural process to train staff who are naturally interested and motivated, as well as the most competent and confident in using OERs.
- What we know (UK perspective): an aging workforce; an aging tutor base; a student base that is older than the average student base for FE or HE. All of these factors contribute to the importance of sharing knowledge (intergenerational learning), but also present challenges in terms of how training is rolled out, how we get buy-in, and how we develop a workforce that sees this as an integral part of course development.
- There is a need for training because there is a need for culture change.
- Training ensures that staff continue to grow in confidence and capability so that they can continue to use, or start to use technology effectively.
- Training will help organisations to realise the potential of using OERs for their learners and staff.
- There is a strong consensus in the AE sector to use and produce OERs however this is hindered by the lack of training available.
- There is a need for training that explains how open licensing works and how to use it, as well as how to use OERs and successfully integrate them into current practices.
- Recommendation: How to use open licensing (Creative Commons).
- Recommendation: How to develop OERs, how to use OERs.
- Recommendation: How to embed OER practices.
- Recommendation: How to find OERs; how to search for OERs.
- Recommendation: Making OERs accessible.
- Recommendation: Developing OER policies and strategies.
- Recommendation: How to evaluate OERs.
- Recommendation: How to quality check OERs – formatting, spelling, accessibility.

b) Format of the training and ways of organizing learning

- Blended and online learning approaches – many AE institutions have staff dispersed over a large geographical area.
- Utilisation of teleconferences and webinars that encourage participation, communication and collaboration.
- Online training combined with face-to-face support through peer mentoring.
- As a CPD approach.
- A blended approach that involves face-to-face and online. It may also involve group activities (between practitioners and learners).
- Important for staff to reflect on their (current) practice as a precursor to training.
- Training that supports staff development through self-directed learning and also local activity.
- Format should not be 100% online; this is because staff cohorts are likely to have an incredibly broad remit with regards to skills and confidence. A mix of electronic communications, face-to-face activities and events works well.
- Adopt a mentoring model or buddy system to encourage individuals to go online and participate in training.
- Training that is interactive, not just self-directed and individual learning.
- Collaborative group work and the use of collaborative tools.
- Link the training with current project work so that the training is project-based.
- Yammer\(^{23}\) is a useful tool for developing discussions.
- Padlet\(^{24}\) is a useful tool for ‘brainstorming’ activities.
- Use learning tools that are intuitive.
- Adopting a ‘communities of practice’ approach to encourage collaborative learning.
- Use a benchmarking tool/survey in advance of any training to gauge individual learning needs.
- Organise learning in collaboration with people who have been involved in the production and use of OERs to help develop a whole range of skills, not just skills relating to OER.
- Organise learning that can be done practically.
- Organise learning through cross-sector participation.

\(^{23}\)https://www.yammer.com/
\(^{24}\)https://padlet.com/
4.4. Romania

4.4.1. OER for adult education in the regional/national context

At the moment we cannot speak about a consolidated frame for the implementation of OER in Romania (Burloiu et al., 2014). Romania appears active in the OER movement mainly through initiatives by institutions/groups and engaged individuals as well as through specific projects or programmes (Holotescu, C., 2012).

Even though not yet concretised, there are also initiatives at government level that can create a promising perspective for the implementation of OER. One example is the Government Programme for 2013-2016 adopted in December 2012 that specifies that the Ministry of Communications and the Ministry of Education will collaborate to support the innovative integration of Web2.0 and Open Educational Resources in education (Holotescu et al., 2014).

So far, the existing initiatives, projects and available resources are focusing almost exclusively on higher education and school education, with little or no focus on adult education. To better illustrate the current situation, it is worth looking at the OER and OEP examples provided in the POERUP Report for Romania (Holotescu, C., 2012):

1. Open materials (especially for the pre-university system) and discussions for validation / adaptation of the materials in online communities:

   - [http://forum.portal.edu.ro](http://forum.portal.edu.ro)
   - [http://didactic.ro](http://didactic.ro)
   - [http://e-scoala.ro](http://e-scoala.ro)
   - [http://www.dascali.ro](http://www.dascali.ro)


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4. The Centre for Innovation in Education (TEHNE Romania) [http://www.tehne.ro](http://www.tehne.ro) is an organization aiming to support educational initiatives through projects and programs covering areas of e-learning, ICT in education, curriculum development, education for democratic citizenship, lifelong learning, and in-service teacher training.

5. Cirip.eu ([http://cirip.eu](http://cirip.eu)) is an educational multimedia microblogging platform, hosting online / blended courses on new educational technologies, open to Social Media platforms for using/sharing/creating/recreating (little) OER, gathering an educational community around learning scenarios.


7. The Romanian Open Access community portal [http://www.acces-deschis.ro/en](http://www.acces-deschis.ro/en) is a website aimed to bring more insight into the Open Access publishing models and to open new directions in Romanian research and development. The expected audience are researchers, scholars, university and high school teachers, university librarians, research librarians, archivists, and all those who work in the information science field.


10. Romanian Encyclopedia [http://enciclopediaromaniei.ro](http://enciclopediaromaniei.ro) is published under a CC license.

11. Veioza Arte [http://veiozaarte.ro](http://veiozaarte.ro) is a video sharing platform acting as an open source production house for the Romanian cultural scene.

According to Pavel et al. (2014) there are very good examples of grass root initiatives and projects with huge potential of becoming OER, which share the same philosophy behind OER but fail in attributing a licence for the created resources. The tendency is to focus on the proprietary products since the open concept has not yet been put on the agenda.

The situation of OER in adult education is far from being a positive one. More advocacy and awareness raising, targeted towards decision makers, is needed. There are plenty of resources created by adult education institutions (for example LLP projects) who are interested in redistributing but do not have the capacity and knowledge to promote the materials, which are lost and forgotten because of the lack of policy and practice in the field.

The use of OER in adult education is closely connected to the digital competence of adult learning professionals. The national standards for the occupation of “trainer” do not comprise any specific competence unit for digital knowledge but there are recommendations (Holotescu, C., 2007) for teachers training programmes to include topics related to OER, new licenses and tools to create educational materials in a collaborative manner.

### 4.4.2. Current implementation of OER in adult education in the regional context

#### a) Perception and attitudes

The general opinion is that open educational resources play an important role in improving the quality of content and delivery in adult education. From the management point of view, OER means accessing new resources without spending a lot of time and money.

The innovative aspect of the OER, the fact that they use authentic material is another important aspect. Adult educators are dealing with a group of learners that need to access updated and ready to use information. The constant renewal of OER ensures a greater variety and more suitability to the use of these resources in teaching adults.

Also, the interviewees believe that OER are not only useful and appropriate but absolutely necessary for their activities, as stated by one educator: “The main reason is a little bit selfish: there is a lot of good stuff all over the internet, made by great educators and from their experiences. Sometimes I don’t have the time to build my own resources or sometimes I didn’t think of a different perspective. So that’s why I heavily rely on the others’ knowledge, altruistic enough to share their work.”
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b) OER usage and practice

The managers of adult education institutions reported that in cases where there is no explicit institutional policy, the use of OER depends very much on the trainer’s approach. Those who are coordinating training activities often make suggestions for content approaches by sharing different OER.

OER are used in order to plan, teach and facilitate the learning process. They are used in class but also sent to learners for independent learning (in language courses). The language trainer interviewed said that “we do have a group where we share OER and suggest useful materials” and “there is a set of OER that I have been using regularly for several years now and that I can rely on”.

On the same time, interviewees could not say that they have a specific OER approach in the educational practice. They try to find the best content that suits their purposes or integrate better to a particular context (teaching, training and planning): “Since they are already created I just search online repositories and take OER selectively to incorporate or adapt them into my own courses”.

There are also examples of teachers who have started using OER some years ago and have advanced from the simple searching to now creating their own resources: “My experience started with curiosity in 2006 when I opened my blog. At that time I wasn’t familiar with the openness but without knowing I started to create my own digital resources for my courses, and make them available to others. Then I participated in a European project .... developing a course ..... which included a unit about OER and OEP (at that time I think I was the first in Romania). Afterwards my interest grew and I wrote a lot of papers on this topic. Now I easily build courses around OER (all kinds of them to suit the syllabus topics).”

c) Availability and quality of OER

The general opinion is that the access to open educational resources is rather easy. Participants of the need analysis said, that they mostly find the resources on their own. In addition, they find out about useful resources during teacher training events, conferences, or seminars. However, even if availability of OER is not a problem, adult learning professionals say that finding good quality and appropriate resources remains a time-consuming responsibility of the user. Therefore the existence of automatic tools to select specific educational content would be very much needed.

Among the criteria used to assess quality of OER’s the following have been mentioned:

✓ Usefulness
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✓ Appropriateness for the intended learner
✓ Competences developed
✓ Specifying the age group and the level
✓ Useful exercises created alongside authentic material
✓ Relevance and applicability for specific needs and purposes
✓ Good organization and straightforwardness
✓ They have to provide accurate and updated information

Also, one of the experts believes that the majority of OER lack the academic standards, having a poor design that fails to make clear the concepts they are meant to illustrate. She adds “for me the main criteria is the clarity of ideas and a good use of technology, especially audio and video (animation included)”.

d) Barriers and drivers for the use of OER

None of the organisations involved in the need analysis have an explicit policy for the use of OER, which means that the creation, adaptation, sharing and using falls very much under the creativity and willingness of the professionals themselves. So to say, the efforts are concentrated only from one side (the professional’s side) even though in the end the whole organisation (including learners) benefits from the efforts of those who struggle with the use of OER.

Awareness raising is mostly needed for organisations who maybe do not have an OER policy but have all stated that openness is not problem, rather the lack of promotion for OER at organisational level and maybe also the lack of knowledge for targeted business models. They also stated that this would influence the recognition and motivation for professionals (teachers, trainers, educators) who for now are mostly dealing with the issue on their own.

It has also been reported that OER for adult education are not promoted well enough, which automatically puts a barrier towards the usage, not necessarily because adult learning professionals are not interested, but mostly because there is still a lack of knowledge about OER and the added value they bring to the educational practice.

Another barrier emphasised regarding OER usage is the fact that “some of them are only partly available and what initially seems to be an open resource proves to be restricted by a subscription and/or payment of a certain fee”.

e) Impact of OER use in adult education institutions
All participants agreed that in the digital era we live nowadays OER are not only very useful, but they bring a lot of added value to the educational practice or teaching process. This is very well emphasised by one of the interviewees: “The value lies in the innovative aspect they provide and the real life feeling they bring by using authentic material. In the cases where a textbook would be too mainstream or too out-dated, OER would provide the element of surprise in the classroom and would foster engagement within the group of learners”.

Also, participants believe that OER bring a sense of availability and accessibility of resources that can now reach more people and have impact on a bigger scale.

Very specific opinions were expressed by representatives of NGO’s and higher education. While for the higher education environment the academic visibility (for those who create and share OER) is very important, NGO’s who usually have limited financial capabilities and therefore the availability of free resources is crucial in their activity, especially for those who provide free training courses (for youngsters, disadvantaged adults etc.).

4.4.3. Recommendations for the development of the training package to support the use of OER for adult education stakeholders

a) Need for training and recommendations for the training content

All participants of the need analysis (both interviews and roundtable workshop) have unanimously stated that they need additional training on OER and are very open to take advantage of the training course offered within the OERup! project.

Otherwise they are quite comfortable with their level of using OER and have a strong motivation for using OER.

For institutional decision makers, experts and higher education staff, the development of OER policies, creation and promotion of OEP seems to be very important. Participants of the interview and roundtable workshops agree that this should be one of the main focuses in the development of the training package. They seem to be very open to learn how to use different tools and means that can contribute to raising awareness on OER and OEP in their own organisations.

Some participants believe that finding an appropriate resource depends a lot on the searching methods you use and therefore searching for OER’s should be an important part of the training. One participant states “It can be really daunting not to find the necessary resource in an appropriate time, and you can easily give up when all the materials you find are unsuitable for your teaching purpose”. Another participant says “Sometimes I am
“anxious if I cannot find the source – for eg if a video isn’t clearly under a CC license and if I cannot be in contact with the creator – shall I use it or not?”

Creating, adapting authentic material for classroom purposes, as well as selecting OER is of high interest for the participants in the need analysis. In addition, some mentioned the importance of mastering software applications when talking about creating own resources.

b) Format of the training and ways of organizing learning

For the type of training offered within the OERup! project participants find the blended learning approach definitely suitable. Their preferred format of the training means a 8-10 hours course, with a percentage of 70% online training and 30% face to face activities.

Project based and group work seems to be the most preferred among the interviewed participants. When it comes to online vs. face to face, almost all participants stated that self-directed and project based fit best for the online part, while collaborative and group assignments are preferred for the face to face training.
V. Common identified trends in the use of OER

The need analysis shows local trends in each region/country and a different level of use of open educational resources, but it is possible to identify common trends among the partner countries:

- **Perception and attitudes towards OER:** the adult education professionals and organisations seem to be open to find more about OER and to understand the philosophy behind, in spite of the skepticism associated with digitalization and the lack of resources in national languages. Even though it is acknowledged that OER play an important role in improving the quality and content in adult education delivery. For small organisations, especially NGO’s, who have limited financial resources, OER seem to be a good option for using good educational material without spending a significant amount of time and resources.

- **OER usage and practice:** there are very few adult education organisations who implement a specific OER policy. The integration of OER falls more under the responsibility and willingness of teachers and trainers who decide to create, share and use OER in their educational practice.

- **Availability and quality of OER:** Finding appropriate, good quality OER resources in national languages is still a big challenge. The process of selecting good OER is also difficult as it is a time consuming task, given the lack of automatic tools or relevant platforms. 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.

- **Barriers and drivers for the use of OER:** there is a lack of information and awareness concerning OER and OEP in general, and even more, contextualization of Open Education, as a new phenomenon into new sectors such as adult education, is still hard to achieve. Searching for reliable open content is often time consuming and sometimes what initially seems to be an open resource proves to be restricted by a subscription and/or payment of a certain fee. Professionals are mostly dealing with the OER issue on their own, while the development of OER polices and business models into their organization would bring more motivation and recognition for those who decide to integrate OER into their educational practice.

- **Impact of OER use in adult education institutions:** there is a big potential for OERs not only to improve the quality and content of teaching, but also to contribute to the professional development of staff. At the moment people are spending a lot of time and efforts to create resources already available, which can be saved by adopting OER strategies, that can help organizations to utilize their resources more practically, gain reputation for producing good OERs and grow their networks through the development, sharing and dissemination of OERs.
VI. Summary of recommendations for the development of the training package

There seems to be a consensus regarding the need for training on OER and initiatives such as OERup! need to stimulate interests in AEI staff and motivate professionals to the use of OER. These are the main recommendations for the development of the training package to support the use of OER for adult education stakeholders:

- **Need for training and recommendations for the training content:** there is a high motivation amongst adult learning professionals to learn more about OERs and a high degree of openness to be trained in better using OER’s. Well directed training and activities may ensure the uptake of OER and OEP on a sustainable, nationwide and long term basis, by pointing out the added value of Open Education, by providing the relevant tools and skills to reuse, revise, remix, and redistribute OER in a very practical way, and by provoking a sense of entrepreneurship an project development for Open Educational Practices. Basic information and practical advice are needed by adult education staff: raising awareness on open education and open content; strategies to identify OERs; adaptation and creation of OERs; licenses and copyright issue; examples of success stories and good practices on OER use in adult education; development of new business models; learning relevant forums, communities or platforms, where future developments concerning OER and OEP are being discussed, for anyone interested in the topic to stay informed.

- **Format of the training and ways of organizing learning:** 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. Expert input has been mentioned by prospective participants. Most adult education professionals have limited time to dedicate to additional training, and therefore a 70% online and 30% face to face training is preferred. The OERup should have CPD\(^{25}\) approach and allow staff to reflect on their current practice. Project based and group work activities should allow collaborative learning and the creation of a community of practice. A key aspect is also to recognize previous learning and use a benchmarking tool/survey in advance in order to identify individual learning needs.

\(^{25}\) Continuous professional development
VII. Conclusions

From what emerged in the OERup! need analysis 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. One of the respondents of the European analysis done by SOPHIA, 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**: another 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 builds 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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Annexe: Interview grid

Questions for educational professionals (professor, teacher, curriculum designer, learning technology specialist, trainer, etc.)

A. General information

A1. Role:
   - Organisation:
   - Contact details:
   - City and country

A2. Type of organisation
   - University
   - Training provider
   - NGO
   - Research institute
   - Community learning provider
   - Further education and/or tertiary college
   - Independent specialist college
   - Third sector provider
   - .........
   - Other

A3. Type of provision
   - Tertiary education (including university)
   - Vocational training
   - Liberal adult education (non-formal adult education)
   - Basic education
   - Work based learning
   - .........
   - Other

A4. Delivery of training
   - Online and/or distance education/training
   - Conventional (face to face, classroom based)
   - Mixed
### A5. Your status in the organisation

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<th>Status</th>
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<tbody>
<tr>
<td>Permanent staff</td>
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<tr>
<td>Temporary staff</td>
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<tr>
<td>External collaborator</td>
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<td>Other...</td>
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### B. Implementation of OER

#### B1. Perception/Attitudes

Do you consider OER to be useful and appropriate for your educational practice? Motivate your answer.

#### B2. Usage/Practice

Do you have an OER approach in your educational practice? If yes, please detail the OER’s used; explain also what is the purpose of using OER (teaching, planning and organising teaching, additional support for learners, CPD etc.) If the answers is no, please express your interest in starting to use OER for your educational practice.

What is your experience with the use of OER (browsing for resources, creating own resources, sharing resources)? How did you get to use OER and for how long you have been using this type of resources? Detail your answer.

#### B3. Availability/Quality

How accessible do you consider to be the OER’s for AE in your region/country? Please explain where do you find OER’s and where/how you would like to find this kind of resources; how do you get access to OER’?

How would you assess the quality of OER available?

Do you have any criteria for selecting adequate OER’s?

#### B4. Barriers/Drivers

What are the main barriers to using and accessing OER for your educational practice?

What would be the measures/aspects that would facilitate/support the implementation of OER in your organisation and your educational practice? Is there a consensus at organisational level (existing policy, culture, strategy; do you get recognition and
support for using OER in your educational practice; do you feel motivated to carry on with the use of OER)

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<th>B5. Impact</th>
<th>What is the value of OER for your educational practice?</th>
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<th>C. Training needs</th>
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<tbody>
<tr>
<td>C1. Need for training</td>
</tr>
<tr>
<td>C2. Content</td>
</tr>
<tr>
<td>C3. Format of the training</td>
</tr>
<tr>
<td>C4. Ways of organising learning</td>
</tr>
</tbody>
</table>

Questions for institutional decision makers (managers or administrators)

<table>
<thead>
<tr>
<th>A. General information</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1. Role:</td>
</tr>
<tr>
<td>Organisation:</td>
</tr>
<tr>
<td>Contact details:</td>
</tr>
<tr>
<td>City and country</td>
</tr>
<tr>
<td>A2. Type of organisation</td>
</tr>
<tr>
<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>
### A3. Type of provision

<table>
<thead>
<tr>
<th>Provision Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tertiary education (including university)</td>
</tr>
<tr>
<td>Vocational training</td>
</tr>
<tr>
<td>Liberal adult education (non-formal adult education)</td>
</tr>
<tr>
<td>Basic education</td>
</tr>
<tr>
<td>Work based learning</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

### A4. Delivery of training

<table>
<thead>
<tr>
<th>Delivery Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online and/or distance education/training</td>
</tr>
<tr>
<td>Conventional (face to face, classroom based)</td>
</tr>
<tr>
<td>Mixed</td>
</tr>
<tr>
<td>Blended</td>
</tr>
</tbody>
</table>

### A5. Status of the organisation

<table>
<thead>
<tr>
<th>Organisation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
</tr>
<tr>
<td>Private for non-profit</td>
</tr>
<tr>
<td>Private for profit</td>
</tr>
</tbody>
</table>

### A6. Size of the institution in terms of learners

<table>
<thead>
<tr>
<th>Size of Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>...............</td>
</tr>
</tbody>
</table>

### B. Implementation of OER

#### B1. Perception/attitudes

Do you consider OER to be useful and appropriate for the educational offer in your organisation? Motivate your answer.

#### B2. Usage/Practice

Does the educational offer of your organisation have an OER approach? If yes, please detail the OER’s used; explain whether this is an institutional policy or a random practice. If the answers is no,
**Summary report of OERup! Need Analysis**

please express your interest in adopting and OER approach for the educational offer of your organisation.

What is your experience with the use of OER (searching, creating, sharing)? Detail your answer.

| B3. Availability/quality | How accessible do you consider to be the OER’s for AE in your region/country? Please explain where do you find OER’s and where/how you would like to find this kind of resources; how do you get access to OER’?
| | How would you assess the quality of OER available?
| | Do you have any criteria for selecting adequate OER’s?

| B4. Barriers/Drivers | What do you consider to be the barriers to the use of OER’s?
| | What would be the measures/aspects that would facilitate/support the implementation of OER in your organisation?

| B5. Impact | What do you consider to be the value of OER for education and training in your organisation?

| C. Training needs |
| C1. Need for training | How do you feel about using OER for the educational offer of your organisation?
| C2. Content | Would you need additional training? Please give your opinion on the following training areas: creating an OER policy, improving the organisational policy, developing a business plan etc. Please give examples of other content areas that might be of interest for you.
| C3. Format of the training | What would be your preferences for the training format in terms of length and setting for a blended learning approach (percentage/distribution of face to face and online activities)?
| C4. Ways of organising learning | How would you like this training to take place in terms of interaction (collaborative, group work, self-directed learning, project based etc) with other participants (Trainer and trainees)?
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and join our Google+ community to exchange experience as well as information on relevant initiatives, studies, or platforms: plus.google.com/u/0/communities/109090515452084003343