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**ADULT EDUCATION AND
OPEN EDUCATIONAL
RESOURCES**

STUDY



DIRECTORATE-GENERAL FOR INTERNAL POLICIES
POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES

CULTURE AND EDUCATION

ADULT EDUCATION AND OPEN EDUCATIONAL RESOURCES

STUDY

This document was requested by the European Parliament's Committee on Culture and Education.

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POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES

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Abstract

This study reviews the current use of Open Educational Resources in Adult Education, assesses its potential and makes recommendations for policy interventions, taking account of the European Commission's policy frameworks. It incorporates new research on over 12 Member States, leveraging on a synthesis of existing research from a range of projects including POERUP (Policies for OER Uptake) and a 2014-15 study on Shared OER for the Joint Research Centre, augmented by two more recent studies for JRC and LLP.

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EXECUTIVE SUMMARY

Overview

Adult Education is a subject of great interest to the European Union. Alarming, one in five adults have low literacy and numeracy skills, one in four have completed lower secondary education at most and one in three have very low or no ICT skills. While progress is being steadily made, considerably more work needs to be done.

The use of Open Educational Resources has been developing fast in Europe, despite the recession. A few Member States have taken leading positions in open education. It is clear that OER can offer many benefits, including, longer term, the possibility of delivering education in a more effective fashion while keeping a close eye on cost.

This study is about Adult Education in the context of OER. For up to date thinking on Adult Education more generally, the reader is referred to the February 2015 Eurydice report *Adult Education and Training in Europe: Widening Access to Learning Opportunities*.

Structure

The study is structured into five chapters.

Chapter 1 is a brief introduction.

Chapter 2 provides policy background.

Chapter 3 details the Research Plan. It restates the two general questions: (1) availability/feasibility of OER in adult learning, and (2) actions that might be taken to enhance this. It lists the eight specific questions also to be answered. The chapter finishes with a structural description of the adult education sector and a brief summary of the UNESCO definition of OER.

Chapter 4 is a long chapter answering in detail the majority of the questions. It minimally deals with one (on OER to aid the knowledge base), regarding it as marginal, and defers part of another (on policy tools) to the policy chapter (Chapter 5). Otherwise it takes the **questions as asked; however, in order to provide a 'red thread' it uses a scheme of benchmarking and change management, informed by MIT90s considerations, to link the questions to 10 strategic topics.** There are thorough answers on quality, cost, licensing (Creative Commons is recommended), accreditation of informal learning, and on the changing role of educational establishments. The chapter ends with consideration of barriers to OER, MOOCs and other kinds of flexible learning, as a link into the policy chapter. There is a strong theme throughout the chapter on what institutions need to do in order to change to cope with the new challenges raised by OER for adult education. Staff and student skills (and attitudes), two of the key benchmark themes, are repeatedly covered from different angles.

Chapter 5 integrates the answers to the questions in Chapter 4 with ongoing policy work on OER, open and flexible learning, to produce a policy synthesis. It reworks the 13 **'Calls' of the Council Resolution on a renewed European agenda for adult learning** into OER-friendly format and integrates the formerly separate HE and VET policy documents of POERUP into a new synthesis repositioned directly towards adult education. The next section moves the agenda onwards to the non-formal and informal learning sectors. A final section recommends a link between these, via Accreditation Gateways, building on

earlier work on Accreditation of Prior Learning (in HE) and 'one-stop shops' in VET and adult education.

The study closes with a short set of Acknowledgements, followed by a Glossary (of over 80 items) and comprehensive bibliography (with over 410 entries) of papers and reports consulted. The bibliography aims to have a focus on peer-reviewed research and official reports (Eurydice, Eurostat, OECD, UNESCO, etc) but the fast-moving and fragmentary nature of the evidence base means that a number of more transient lower-quality artefacts needed to be considered, along with a growing pile of policy pronouncements from the European Parliament along with those from the European Commission and its subsidiary agencies.

Key outputs from Chapter 4: the questions and their answers

There is sufficient OER activity under way related to Adult Education that we felt confident in drawing conclusions; however, some conclusions are tentative and for others the evidence base (especially in terms of case studies) is weak.

The topic of OER is most usefully considered within the wider topic of the use of ICT in Adult Education.

Issues of quality and accreditation are in our view soluble, but we encourage European and national agencies to move faster to solve them.

The issue of recognition of prior learning is again in our view soluble, but requires an element of specialised attention and faster progress in EQF, ECTS and credit transfer generally.

The much-hoped cost savings are potentially achievable, but case study information is limited. Furthermore, the cost savings may be achievable only by making changes to the educational system which may be challenging in some Member States as an infringement on the role of institutions or the teachers within them. Trade-offs will be needed. Smaller states, and smaller autonomous regions within states (especially those with their own languages), may have difficulty in making these trade-offs.

A range of actions is also possible with bilateral or language-specific multilateral collaborations between Member States.

Key outputs from Chapter 5: recommendations and policies

Quality and accreditation

- National quality agencies, with support from ENQA (for HE) and EQAVET (for VET) should develop their understanding of new modes of learning (including online, distance, OER and MOOCs) and ensure that there is no implicit non-evidence-based bias against these new modes.
- The Commission and related national and international authorities developing the European Higher Education Area and the European Area of Skills and Qualifications should work towards reducing the regulatory barriers against new non-study-time-based modes of provision.
- Member States should more strongly encourage HE and VET providers to improve and proceduralise their activity on Accreditation of Prior Learning.
- Larger Member States should set up an Open Accreditor to accredit students for **HE studies and a parallel model, perhaps via 'one stop shops', to accredit vocational competences.**

Staff development

- Member States, with support from the Commission, should support the development of online initial and continuous professional development programmes for teachers/trainers/lecturers, focussing on online learning and IPR.
- Member States should consider the use of incentive schemes for teachers/trainers/lecturers engaged in online professional development of their pedagogic skills including online learning.

OER and IPR

- The Commission and Member States should adopt and recommend a standard Creative Commons license for all openly available educational and vocational training material they are involved in funding.
- **Member States should phase out use of the 'NonCommercial' restriction on content.**

Costing and other research

- Member States should increase their scrutiny of the cost basis for university teaching and vocational training and consider the benefits of different modes of funding for their institutions

Focus on students

- Member States should promote (within the context of their sovereign educational aims and objectives) to adult learners the availability and accessibility of open resources created through their respective cultural sector and schools programmes.
- Specific funding should be devoted to building OER corpora of material in key topic areas of interest to adults. The corpora should be designed ideally for independent self-study, guided self-study (in both the formal and informal sector) and as resources to support lecturers teaching such courses. This maximises the **investment in them. Rather than just 'silent' textual materials, the materials** should contain audio-visual elements and, for hard to learn concepts, interactive components and quizzes. This to some extent will overcome the barriers that can be found to studying textual material by those whose reading skills in the national language(s) may be less adequate.

Funding

- The scarce funding for supporting adult learners should increasingly be targeted in an ***output-based fashion*** to reward adult learners for progression through the EQF. The accreditation gateways (one stop shops) could play a key role in this process. It is recognised that for this to work well, it needs a more developed and pervasive EQF than currently exists.

1. INTRODUCTION

Adult Education is a subject of great interest to the European Union. A series of reports over the last few years have made it clear that the EU has considerable catching up to do in order to match the level of education of other advanced economies. Alarming, one in five adults have low literacy and numeracy skills, one in four have completed lower secondary education at most and one in three have very low or no ICT skills. While progress is being steadily made, considerably more work needs to be done. Moreover, while Member States' policy agendas commonly place emphasis on such needs, they rarely specify definite targets to be reached.

Funding is, worse than in the last decade, a major problem, especially for the parts of Adult Education less to do with higher skills and qualifications.

The range of needs encompass the whole educational gamut from improving literacy and numeracy in the national languages, through catch-up programmes to combat the deleterious effects of early school leaving, to increased capability in higher vocational skills and university studies relevant to an advanced economy.

The use of Open Educational Resources has been developing fast in Europe especially since the turn of the decade, despite the recession. A few Member States have taken leading positions in open education and the European Commission has funded a number of transnational development and analytic projects. It is clear that OER can offer many benefits, including, longer term, the possibility of delivering education in a more effective fashion while keeping a close eye on cost.

Most of the earlier EU-funded work on OER has focussed on either the formal educational sectors (universities and schools in particular) or informal education of already well-educated students. It is timely to extend such work across all educational sectors, including the full spectrum of informal education, and across a wider age range.

Thus the research team is grateful to the European Parliament, Committee on Culture and Education, for funding this study on Adult Education and Open Educational Resources.

A separate Annex (63 pages) contains eight commissioned EU Member State reports, plus brief reviews of nine other Member States, concluding with entries on the most relevant non-EU countries to the agenda: Norway, US and Canada.

This report is about Adult Education in the context of OER. For up to date thinking on Adult Education more generally, the reader is referred to the February 2015 Eurydice report *Adult Education and Training in Europe: Widening Access to Learning Opportunities* from which we quote on many occasions including in this Introduction. (Much of this report updates the 2011 Eurydice report *Adults in Formal Education*.)

2. BACKGROUND TO THE STUDY

Adult Education in Europe: policy history

Adult learning constitutes one of the cornerstones of EU educational policies. The Council of the European Union (2012) called for the adoption of a renewed *European Agenda for Adult Learning*. In this the Council also encouraged higher education institutions to embrace less traditional groups of learners, such as adult learners, as a means of displaying social responsibility and greater openness towards the community at large, as well as responding to demographic challenges and to the demands of an ageing society.

Following this the European Commission (2012) launched the *European Agenda for Adult Learning*. The Agenda has strong links with the *Strategic Framework for European Cooperation in Education and Training*, ET2020, with the specific priorities it sets for adult learning and the emphasis it gives to the education of low-skilled adults and basic skills provision.

Next, the European Commission (2013a) published *Opening up Education*, a Communication covering OER and MOOCs, which highlighted the potential of OER for expanding adult learning; and in the Communication, the Commission mentioned that it planned to create a new network called EPALE (Electronic Platform for Adult Learning in Europe).

The Communication was the subject of a report in the CULT Committee of the European Parliament (2014) which pointed out that 'OERs geared towards the needs of adult learners should be developed so as to ensure greater lifelong learning opportunities for low-skilled European citizens, bearing in mind the fact that many learners have low ICT skills'. It also stressed 'the growing importance of adult education, particularly in the context of lifelong vocational training, and calls for the Europe-wide recognition, strengthening and promotion of all adult education organisations'.

It is also noteworthy that in November 2013 IPTS – the Joint Research Centre – published a report *Overview and Analysis of Practices with Open Educational Resources in Adult Education in Europe* (Falconer et al, 2013).

3. THE RESEARCH PLAN

The goal of this study is to highlight the possibilities offered by the employment of OER within Adult Education. The overall aims were stated as:

1. Review the availability and feasibility of OER in adult learning
2. Make suggestions for possible action to be taken.

The study is thus expected to serve three distinct functions: Description, Assessment and Recommendation. *Description* (at the Member State level) is largely carried out in the Annex, *Assessment* in Chapter 4 and *Recommendation* in Chapter 5 of this study.

3.1. Research Questions

With regard to the general objectives outlined above, the following **general questions** were stated as:

1. What is a) the availability and b) feasibility of OER in adult learning?
2. What possible actions may be taken in order to enhance the use of OER in adult learning?

In addition, eight **specific questions** were provided:

1. How can OER be integrated into certified courses provided to adult learners? What are their sustainability (in terms of work and funding)?
2. What quality aspects may be considered in the use of OER in adult learning? What quality assurance issues may be considered? How can OER improve the quality and efficiency of training and education in adult learning?
3. Are the Creative Commons licenses the best answer to licensing of open content; and, if so, why?
4. Do OER improve the knowledge base for adult learning and contribute to a better monitoring of the adult learning sector? If yes, how?
5. How can OER contribute to raising participation rates in adult education?
6. What are the implications for educational planners and decision-makers of the use of OER in adult learning? In particular what issues of accreditation/validation of skills and competences acquired via OER could be considered?
7. How can existing policy tools to support adult learning best be used for the inclusion of OER?
8. What is the role of (adult) educational establishments (particularly universities) to design, plan and implement education based on OER?

3.2. Methodology

The methodology adopted for the research was derived from the Terms of Reference. In more detail it involved:

- Systematic review of earlier work by the study team on OER-related survey and policy work including in particular POERUP, SharedOER and SEQUENT (quality in e-learning), but also related work by colleagues on OpenCred.
- Consideration of studies and material on the topic provided by the European Commission, Eurydice, Eurostat, etc.
- Eight specific studies on Member States done by or with in-country experts.

The Member States chosen were eight: six main countries comprising United Kingdom, France, Spain, Hungary, Sweden, and Latvia; augmented by Germany and Romania. The full country reports are available in the *Annex* (a separate report).

In addition, four other Member States were looked at briefly. The study also took into consideration a substantial body of OER mapping documentation on countries and regions which had arrived too late for full incorporation into POERUP reports and maps. These are also in the *Annex*. Late in the project lifecycle it was possible to incorporate insights from four country reports from *OERup!*, based on interviews with adult educators in these countries.

The work took into account the existing legal framework and relevant resolutions of the European Parliament (2001, 2008, 2009, 2012, 2013a, 2013b, 2013c, 2014).

The rationale for the selection of the eight countries was to ensure that all types and locations of Member States were considered. In more detail:

1. **United Kingdom**, the team's base – large population, north EU, world language also an official language in other Member States ; but with minority languages (Welsh, Gaelic) and different traditions of adult education; very active in OER though mostly in England
2. **Spain** – large population, south EU, world language; but also with minority languages (Catalan, etc) and autonomous communities; active in OER
3. **France** – large population, west EU, world language spoken in one other Member State (Belgium) and in other nearby countries/regions; quite active in OER and active in MOOCs
4. **Sweden** – medium population, north EU, Scandinavia, regional language also spoken in one other Member State (Finland) – strong tradition of adult education, less active in OER
5. **Latvia** – very small population, east EU, Baltic State, less used language, good tradition of distance education (including virtual schools), less active in OER
6. **Hungary** – medium population, central EU, regional language spoken in parts of three other Member States – strong tradition of adult education, less active in OER.
7. **Germany** – large population, north EU, leading European language; recently active in OER and MOOCs
8. **Romania** – medium population, east EU, Romance language, not very active yet in OER.

In view of the focus on the needs of the European Parliament, non-EU countries were looked at only briefly, and only where there were clear lessons to be drawn, such as from US and Canada, or had spill-over of provision, such as Norway. It could be argued that there are relevant activities in Russia but budget issues made these infeasible to study, especially as 'within international DE research Russia remains uncharted territory' (Zawacki-Richter & Kourotchkina, 2012).

3.3. What is Adult Education?

The Council of the European Union (2011), in its *Resolution on a renewed European agenda for adult learning*, defines Adult Learning as 'covering the entire range of formal, non-formal and informal learning activities, general and vocational, undertaken by adults after leaving initial education and training'. We shall regard the scope of Adult Education as synonymous with Adult Learning, but differentiate the phrases by using 'Adult Learning' when focussing on the *learner*, and 'Adult Education' when focussing on the *provider*.

The traditional classification of educational levels ISCED (UNESCO Institute for Statistics, 2012) applied in the first instance to age-based learning:

0. Early childhood education: prior to typically age 5
1. Primary education: typically ages 5 to 10
2. Lower secondary education: typically ages 11 to 15
3. Upper secondary education: typically ages 16 to 18
4. Post-secondary non-tertiary education: typically ages 16 to 19
5. Short-cycle tertiary education: typically 18 upwards
6. Bachelor's or equivalent level: typically 18 upwards
7. Master's or equivalent level: typically 21 upwards
8. Doctoral or equivalent level: typically 23 upwards

However for adults we must reinterpret these levels in terms of credentials/competences; for example interpreting the exit from level 3 to be a school-leaving qualification, and for an increasing minority of students one that allows them entry to university. This leads to the following scheme.

Basic Skills (ISCED 0-2)

There is considerable debate on the meaning of 'basic skills' but in general terms it means 'the skills needed to live in contemporary society, e.g. listening, speaking, reading, writing and mathematics' (Cedefop, 2015d). In ISCED terms this comprises levels 0 and 1 and the non-subject-specific part of 2.

Across Europe, there is a wide range of education and training programmes which provide basic skills to adult learners. Research suggests that a minimum of 100 tuition hours is necessary for making substantial progress in basic skills (European Commission/EACEA/Eurydice, 2015a, p. 9).

Adult secondary education (ISCED 3)

Countries use various approaches to delivering general or vocational upper secondary qualifications to adult learners: some have established a stand-alone programme framework described as 'adult upper secondary education', while others have developed a framework for adults that covers several levels of qualifications. In contrast, a number of countries deliver upper secondary programmes open to adults within their mainstream upper secondary education and training system (ibid, p. 10).

Adult vocational education (ISCED 4)

In general terms, ISCED 4 education is substantially less age-specific and in some countries there is substantial provision for adults from specialised providers, often online (*Annex*, 2015) – see later.

Adult Tertiary Education (ISCED 5-8)

Again, this tends to be less age-specific, although countries differ substantially in the extent to which mature students and/or part-time students are encouraged and supported; and even more so in the extent to which online learning systems are available for such students – see later.

Non-formal and informal learning

Adults in Formal Education (European Commission/Eurydice, 2011) distils several earlier glossary entries into the following key definitions (italics is our emphasis):

'Formal learning is defined as: learning that occurs in an organised and structured environment (i.e. in an education or training institution or on the job) and is explicitly designated as learning (in terms of objectives, time and resources). Formal learning is *intentional* from the learner's point of view. It typically leads to *validation and certification*...

Non-formal learning is defined as: learning which is embedded in planned activities not explicitly designed as learning (in terms of learning objectives, learning time or learning support). Non-formal learning is *intentional* from the learner's point of view...

Informal learning is: learning resulting from daily activities related to work, family or leisure. It is not organised or structured in terms of objectives, time or learning support. Informal learning is in most cases *unintentional* from the learner's perspective...'

3.4. What are OER?

UNESCO (2012) reaffirmed that OER are: 'teaching, learning and research materials in any medium, digital or otherwise, that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions.'

There are many arguments over the precise definition of OER but in our experience such debates are no more helpful than the debates on the precise meaning of 'online learning'. However, the definition of OER has a number of *implicit* issues that can cause difficulty:

- There is a focus on *resources*, which is just one component of the educational process.
- There is an isolation of OER from wider developments in online learning which at many institutions (not all) substantially predate the use of OER.
- There is a feeling of OER being an *endpoint* in the opening process for institutions; commentators from the field of flexible learning feel that 'open is not open enough', either technically because there may be no open source tools to edit specific formats or pedagogically because the contents are specified by a *provider*, not developed by collaborations of *users*.

4. THEMATIC ANALYSIS

Data for the thematic analysis came from a number of cross-cutting thematic analyses based on the specific questions below, and from the country-specific reports (*Annex*, 2015).

The country-specific reports were short pieces of desk research on *Adult Education and OER* in each country designed to be executed within the limited budget for the study, but they were augmented by country reports on *ICT in education at universities, colleges and schools* (VISCED and Re.ViCa country reports) and *OER in HE and schools* (POERUP country reports). It was also useful that during the progress of this study that the report *Adult Education and Training in Europe* (European Commission/EACEA/Eurydice, 2015a) was published, including section 4.2 'Distance learning programmes open to adults'.

Late in the project, the *OERup!* country reports on UK, Spain, Germany and Romania became available. The methodology used for these was different, based not on literature search and local OER analysts but on interviews with Adult Education experts both individually and in workshops; yet the conclusions were very similar. For example, for Germany, 'Actors of adult learning are insecure about the meaning of the terms in use and mistrust the claimed benefits' (Kreitlein & Newerly, 2015). Only in the UK (of the four countries studied) is the situation different, thanks mainly to massive funding of OER in previous years: thus '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' (Lockhart-Smith, 2015).

4.1. General Questions

Two general questions were proposed to the study team:

1. What is a) the availability and b) feasibility of OER in adult learning?
2. What possible actions may be taken in order to enhance the use of OER in adult learning?

In this chapter we shall answer just the first question and leave the second until the next chapter since this covers Recommendations.

4.1.1. Availability of OER in adult learning

In the absence of any ongoing process to generate up to date information on the actual number of OER initiatives in Member States we feel it is impossible to provide accurate data. The POERUP OER Map reports that there are 308 OER initiatives in its global database (the database was frozen in May 2014), but country-by-country work by the POERUP team right at the end of POERUP indicates that there are likely to be around 600 in Europe alone, with considerably more in some countries than are in the map database, especially in Spain, France and Germany. However, it still seems to be the case that there are few OER initiatives in the east of the EU, and even fewer further east in Europe.

The wider category of Open Access is better tabulated, thanks to the ongoing *OpenDOAR* project. This reports (as of March 2015) 1287 repositories in Europe as a whole, roughly double the suspected number of OER initiatives.

However, as experts with over three years of research on the topic we can provide *qualitative* information. The following information comes largely from research for POERUP and SharedOER, correlated with the specific country reports done for this study in the *Annex*.

General considerations

1. Most Member States have provision of general open resources derived from the national broadcaster, national library or similar entities, either directly or via participation in EU programmes such as Europeana.
2. Even allowing for differing population sizes and the differing number of speakers of each EU language as a second language, there is a relative over-provision of resources in English, followed by French and Spanish. Less Used Languages are in general not well served by OER, as reported by **LangOER**.
3. The Open Access agenda for provision of research journals as open resources is by and large more developed in Member States than is the OER agenda, but the picture is complex, and research journals are of relatively little interest to the adult education community beyond postgraduate university students.

Adult learning

1. Material to support literacy in a teacher-led environment could usefully be OER. However, material of this type is not widely available.
2. The situation appears similar for numeracy, though there are projects such as SigMath which may in time develop OER
3. There is a greater amount of OER for self-learning of second languages.
4. In the areas of work skills, 21st century skills and study skills, there is a greater amount of material, but most such material is found in MOOCs and is not OER.

Partial confirmation of our conclusions comes from the four OERup! country studies. For example, in Romania 'at the moment there are only grass root initiatives and projects that focus almost exclusively on higher education and school education, with very little impact on adult education' (Toia, 2015b); for Spain, 'There are few OERs for AE and the resources available need to improve their quality' (Romero et al, 2015).

As noted for Romania, adult education can in theory use material from the formal sectors. Our conclusions for these are tabulated below.

The main ISCED sectors

1. School-level provision of OER (ISCED 1-3) has been developed in several Member States including Netherlands, Finland, Belgium (Flanders) and regions of Germany, and as a consequence of EU projects. It is not known to what extent these resources are consumed by **adult** school-level learners and there seem to be few OER projects specifically targeting adult learners wanting school-level qualifications. (It should be further noted that Member States vary in the amount to which universities require adults to have school exit qualifications (Bachillerato, etc.) for entry as a mature student to university.)
2. Vocational-level provision (ISCED 4) of OER is little developed. The main exception is the **ALISON** project, based in Ireland but accessed worldwide. This is the nearest equivalent of the large US community college initiatives in this area, with their focus on CVT.
3. Tertiary-level provision (ISCED 5-8) is, relatively speaking, the best developed. Substantial Member State funding has gone into this area in some countries and regions, including UK and France, though more into levels 6-8 than 5 (short-cycle). There is also the considerable footprint of the US-based **Open Education Consortium** in 13 Member States and in 5 nearby countries. (On the other hand, the other main HE consortium, **OER u**, has members only in UK, Ireland and Spain.)

Beyond OER

The last point raises the issue of whether by weakening the requirement to be OER, more offerings are revealed. The key feature of most MOOCs is that registration on a MOOC is free (even if in theory there is a quota on learner numbers, there rarely is) but that once the learner is registered, a mass of material is revealed which appears to students to behave like OER.

FutureLearn has several MOOC offerings in the study skills area. But as commentators including Campbell (2013) have noted: ‘the relationship between MOOCs and OERs is problematic...’. Jisc, quoted in Lockhart-Smith (2015), observes that ‘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’.

By and large, at university level, including university offerings to adult learners, more of the offerings are MOOCs than are OER. This is not true for VET or school-level – indeed as yet, with rare exceptions few MOOCs are found below ISCED 5. **Citizen Maths** is a forerunner of the kind of MOOCs which may in time be very relevant for adult learning.

Moving from MOOC to SPOC (Small Private Online Course), essentially an online course of the traditional type, there is considerable provision to adults in Member States of VET material (including CVT) via SPOC – in UK, Spain, France and Germany in particular – and outside the EU in Norway. As reported in the **Annex** and also in **Adult Education and Training in Europe** (European Commission/EACEA/Eurydice, 2015a, pp. 76-79), adults can obtain versions of the mainstream qualifications up to the end of upper secondary level in France (via CNED), Wallonia, Spain (via CIDEAD), UK (via Ufi, now learndirect, and several other providers), as well as Norway and Turkey (via open high school).

There is also substantial provision of Masters-level programmes, usually in fast-changing vocational subjects (information security, bio-informatics, etc) and thus counting also as CVET or CDP.

Sadly there appears to be a **negative** correlation between openness and ISCED level in the adult learning market. In the area of 21st century skills it is particularly disappointing that the European Computer Driving License (ECDL), available in all Member States, has no OER version (Jeans et al, 2015).

4.1.2. Feasibility of OER in adult learning

Feasibility, in our view, has two main aspects, **techno-pedagogic feasibility** and **financial feasibility**.

It is a key ambition of the OER community that collections of resources should be usable for **independent study**, even if they can also be used within formal courses (either free, such as MOOCs, or paid-for).

Thus for techno-pedagogic feasibility we ask the question: ‘Do we **know** how to construct OER for the independent learner?’

For financial feasibility we ask the question: ‘Can we **pay** for the construction of such material out of the funding (from students or state) that we get for our institution’s activities in this area?’ This is particularly crucial for the adult education sector where institutions tend to get less funding, sometimes much less, than universities or schools. This issue of financial feasibility we shall defer until subsection 4.2.2.

Techno-pedagogic feasibility is very much tied up with the concept of the *independent learner*. Distilling the experience of adult educators and distance learning theorists, the following observation can be made: irrespective of factors of background and upbringing, students will tend to become more independent learners as they gain experience in studying especially in studying at higher and higher levels – and as they become adults. However, the term is not straightforward, nor ever has been. Reflecting on her experience in assisting students from disadvantaged backgrounds to get into universities, O’Doherty (2006) trenchantly observes: ‘The concept of independent learning is not new, but is it one on which there is a surprising lack of consensus as to what it means. Independent learning is presented as something of value that is expected to take place at university yet recent reports highlight the fact that now undergraduates, “struggle to cope with the independent and self directed style of learning expected by higher education tutors. However ‘the implication is misleading. Independence is a goal, not a starting point”.’

Despite a focus on compulsory-age learners, Meyer (2010) uses an extensive literature search to come to key conclusions:

‘The successful promotion of independent learning will require careful attention to the learning environment, focusing on both the relationship between teachers and pupils and the wider physical environment and resources within it, including ICT.

Teachers may be helped to promote independent learning in their pupils through an understanding of the models and theories of learning that underpin effective learning. This has implications for initial teacher training and continuing professional development and also for curriculum policy and guidance.

The evidence is inconclusive about the extent to which skills for independent learning are domain-specific or transferable across domains. Further evidence is therefore required to enable appropriate guidance to be developed.

The role of teachers in assisting pupils to learn how to become independent learners is a crucial one as pupils do not become effective independent learners by themselves. There is a well-documented repertoire of strategies teachers can use. This has significant implications for the training and development of teachers both in understanding their role and in deploying appropriate strategies for independent learning.’

Bates & Wilson (2003) detail the extensive ethnographic research that underpins such conclusions, in their case with a strong VET slant within the compulsory system (Youth Training and Vocational Qualifications).

Thus is it not really a surprising fact that most students on MOOCs have degrees already (Laurillard, 2014) – *it is not just because of the subject matter*. It also implies that OER for truly independent study by the very young, or by adults with very limited education (in particular, low literacy levels) will be problematic. For this reason we have reservations about the use of *free-standing* OER for adults returning to school-level study or for lower-level vocational skills. On the other hand, for learners wishing free-standing OER oriented to university-entry qualifications or to higher skills, or for learners in CPD or adult education already with university degrees, we expect far fewer issues to arise.

Many authors, such as Thomas et al (2015), demonstrate the care needed to create effective ‘directed independent learning opportunities’ even for university students. For **independent learner’s use of media see Kirkwood (2003)**.

Student skills

It is also vital to take account of student skills/attitudes in the area of OER specifically and online learning more generally. Online learning runs the risk of excluding the adult population with low or no ICT skills and/or no access to computer/Internet (European Commission/EACEA/Eurydice, 2015a). For some, the lack of face-to-face contact with teacher and peer learners, and the autonomy required, will be de-motivating (ibid).

Even students with ICT skills have many problems in judging the merit of resources. The *LUOERL* study notes: 'Students are not generally sophisticated in their understanding of things like peer review or currency: they are weak at determining the quality of the information that they find on a website...' (Bacsich et al, 2011, p.11).

Staff skills

Staff skills in online learning will need to be developed; currently staff skills and attitudes are a major barrier to wider deployment of flexible learning (Bacsich, 2014a) – see Table 2 in this study and section 4.2.6 later.

Stakeholders

In schools and in higher education the majority of provision is delivered from institutions, usually state-funded in most Member States – and while employers, third sector and social partners are represented on governing boards of such institutions, they are very much secondary in importance as stakeholders. In contrast, for adult education, especially in basic skills, adult secondary education and adult vocational education (but also to a lesser extent in continuing education at university level) provision is delivered in a wide variety of ways from a wide variety of providers, both public and private, including employers, social partners (unions) and third sector (charities and NGOs). This more complex structure has many advantages in terms of resilience and relevance of provision, but can be an obstacle to engendering change.

4.2. Specific questions

The specific questions were eight in number:

1. How can OER be integrated into certified courses provided to adult learners? What is their sustainability (in terms of work and funding)?
2. What quality aspects may be considered in the use of OER in adult learning? What quality assurance issues may be considered? How OER can improve the quality and efficiency of training and education in adult learning?
3. Are the Creative Commons licenses the best answer and in what respect?
4. Do OER improve the knowledge base on adult learning and contribute to a better monitoring of the adult learning sector? If yes, how?
5. How can OER contribute to raising participation rates in adult education?
6. What are the implications for educational planners and decision-makers of use of OER in adult learning? (See below.) In particular what issues of accreditation/validation of skills and competences acquired via OER could be considered?
7. How existing policy tools to support adult learning can best be used for the inclusion of OER? (Covered mainly in Chapter 5.)
8. What is the role of educational establishments (particularly universities) to design, plan and implement education based on OER?

We begin with an institutional analysis to set the scene for the questions, which is in fact our answer to the first part of question 6. We also note that question 5 appears premature given the limited amount of OER currently in adult education.

Implications for educational planners of use of OER in adult learning

Given the lack of case studies, we again fall back on general considerations for ICT in adult learning, adapted to the case of OER. A standard starting point for these considerations are the schemes for benchmarking e-learning developed in the last ten years for use in European post-secondary education. The most used ones that have survived to this day are the E-xcellence scheme (Williams et al, 2011) developed under EU-funded projects by EADTU and the Pick&Mix scheme (Bacsich, 2011) originally developed for the multi-year HEA benchmarking e-learning Exercise in the UK but later used in several other countries.

The various benchmark criteria provide a useful aide-memoire for the topics to be considered when planning the use of OER. For convenience and familiarity to the author a scheme derived from Pick&Mix is used to structure the following nine points, many of which can be found in Mayes et al (2008) but confirmed by later work:

- B1. **Strategy:** Once a decision is made to use OER, there are many challenges that need to be overcome. Thus the strategy of the institution will change to one in which ICT becomes more important. Learners will need to own or have access to computers or mobile devices to access the OER; it is likely that some online repository or VLE will have to be installed. Given the recent evidence confirming that MOOCs (without further support) are still mostly consumed by already-educated students (Ho et al, 2015; Laurillard, 2014), student-student and student-tutor interaction are likely to be necessary, either face-to-face or via a collaboration system (thus more IT) – a view relevant even for universities confirmed by the recent HEA study on independent learning (Thomas et al, 2015).
- B2. **Organisation:** The substantial increase in the amount of IT required and a greater focus on content development is likely to require a Head of IT and greater investment in IT staff.
- B3. **Planning:** Decisions will be needed on deployment of IT and which programmes to convert first to OER; the cost pattern of the institution will change, with more cost up-front (e.g. for content development or search) and greater recurrent costs for IT.
- B4. **Pedagogy:** The informal and lecturer-specific pedagogic approach typical of face-to-face instruction is likely to have to be systematised to fit within the constraints of the IT available.
- B5. **Learning Material:** When learning material is available online, and more so, if open, the wider public can scrutinise it: usability and accessibility issues with content become more visible, and in particular accessibility failures may lead to legal challenge in several jurisdictions (TechDis, n.d.); copyright failures in MOOCs (perhaps for tables or figures embedded in textual material believed to be OER) are visible to publishers and thus subject to challenge (Jisc, 2014).
- B6. **Staff training:** while students may be or may feel they are 'millennial' learners, most staff will not – thus staff development will be needed in order to make best use of the IT and open resources.
- B7. **Quality and evaluation:** quality agencies are less experienced with OER and tend to be conservative in their assessment of new approaches to teaching, particularly outside the HE sector (see section 4.2.2); institutions will have to work with them, especially those who are 'first movers' to OER and MOOC deployment in the vocational and the informal learning sectors.

- B8. **Staff issues:** In addition to staff development, the institution will need to address concerns about staff workload (especially if up-front time is needed to create content, or teaching online is perceived to be more demanding than face-to-face), IT support to staff, and support/incentives for development of the additional skills staff will need to have (skills valuable in the commercial world).
- B9. **Student issues:** When a decision is taken to change the mode of instruction for a course, it cannot be taken for granted that the students who would have studied the predecessor course will naturally subscribe to the new course, especially when the new course is likely require more discipline in independent study (for OER), a higher level of reading skills (OER is highly textual, lectures more auditory), ownership of or access to IT equipment (e.g. tablets not low-cost phones), and a different time pattern of study (replacing evening lectures in favour of online study available at any time, or by weekend lectures). Market research will need to be done and students persuaded of the benefits of the new mode of study.

We shall use the above B-numbers to structure the questions that follow and in particular to draw a 'red thread' through the maze. We also use B0 for government-level issues.

This is the briefest of introductions to a complex subject. For further information readers are referred to standard books on *Transforming Teaching and Learning* such as Bates and Sangrà (2011).

4.2.1. Integration and sustainability (B1, B3, B6)

How can OER be integrated into certified courses provided to adult learners? What is their sustainability (in terms of work and funding)?

Adult educators, like all educators, are used to integrating content from other providers (or colleagues) into their certified courses, as well as developing their own content (even if only presentations and lecture notes). In that sense, OER is just content that is both free and takes no time to develop (in theory). Given the minimal funding of much adult education, free resources are a benefit and lecturers are always keen to save time. However, in the current situation there are many topics where the coverage by OER is limited. The 'discoverability' of OER is also a problem, made worse by the fact that some formerly government-funded repositories are no longer being supported. In reality, many lecturers just do web searches and hope that useful material turns up. There is also the issue of adaptation – often the OER has to be modified, even if in small ways.

On the positive side, the way that learners use OER has been the subject of several meta-studies, in particular *LUOERL*, the *Learner Use of Online Educational Resources for Learning* project (Bacsich et al, 2011). Student skills were discussed earlier under subsection 4.1.2, based on this study.

In addition the implications for teachers have been analysed (Bacsich & Pepler, 2013). This means that there is the knowledge to mount a staff development project oriented to OER for adult educators; however, there are many barriers which are attitudinal not skills-based. The project *OERUp!* is focussing on exactly this topic. Among the interim conclusions from *OERUp!* studies are that (Toia, 2015a):

'...although there is a strong willingness to use OERs, there is a much stronger consensus to produce them...

...creation, adaptation, sharing and using falls very much under the creativity and willingness of the professionals themselves

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...

Strongly connected to this lack of basic information is the fact that many actors of adult education are reluctant to participate in Open Education.'

The sustainability issue is also not easy, and is discussed next, under 'cost'.

4.2.2. Quality and cost (B7, B3)

What quality aspects may be considered in the use of OER in adult learning? What quality assurance issues may be considered? How OER can improve the quality and efficiency of training and education in adult learning?

We split this into quality and then cost.

Quality (B7)

What quality aspects may be considered in the use of OER in adult learning? What quality assurance issues may be considered?

Principles of quality assurance

The European Parliament (2008) enunciated nine overarching principles of quality assurance in its Recommendation on the establishment of the *European Qualifications Framework for lifelong learning*. These were:

1. quality assurance policies and procedures should underpin all levels of the European Qualifications Framework,
2. quality assurance should be an integral part of the internal management of education and training institutions,
3. quality assurance should include regular evaluation of institutions, their programmes or their quality assurance systems by external monitoring bodies or agencies,
4. external monitoring bodies or agencies carrying out quality assurance should be subject to regular review,
5. quality assurance should include context, input, process and output dimensions, while giving emphasis to outputs and learning outcomes,
6. quality assurance systems should include the following elements: clear and measurable objectives and standards, guidelines for implementation, including stakeholder involvement; appropriate resources; consistent evaluation methods, associating self-assessment and external review; feedback mechanisms and procedures for improvement; widely accessible evaluation results,
7. quality assurance initiatives at international, national and regional level should be coordinated in order to ensure overview, coherence, synergy and system-wide analysis,
8. quality assurance should be a cooperative process across education and training levels and systems, involving all relevant stakeholders, within Member States and across the Community,
9. quality assurance orientations at Community level may provide reference points for evaluations and peer learning.

For a modern review of QA principles, within a wider international context (but limited to higher education) see Ossiannilsson et al. (2015), especially section 3.4.

Practices of quality assurance

Unlike many of the topics in this study it is impossible to discuss quality assurance in an EU-wide sector-independent fashion. The reason is that quality agencies, are, with very few exceptions (such as Netherlands with Flanders), both nationally and sector-specific – and in some countries, they are region-specific.

For example (and it is not the most complicated one in the EU), in the UK, quality in schools is the responsibility of OFSTED (Office for Standards in Education, Children's Services and Skills) in England, and similar agencies (but not part of OFSTED) in the Devolved Administrations (Scotland, etc). On the other hand, quality in universities is the responsibility of the QAA (Quality Assurance Agency), a UK-wide body but with semi-autonomous branches in the home nations. In England, quality in the VET sector is also the responsibility of OFSTED; but in many other countries, quality in VET is either overseen by a separate body or integrated with the body for quality in higher education (as e.g. in Austria, Ireland and Malta).

The issue of quality in OER across Europe has been analysed in EU-funded studies: there is a recent comprehensive review by Camilleri et al (2014), but done from an OER viewpoint. Our conclusions here also draw on our own research for the EU SEQUENT project (Bacsich, 2015; Williams, 2015), and work for UK agencies and universities.

Since the situation is (relatively speaking) the clearest in *higher education*, we shall first focus on that. Across the EU, quality in higher education is overseen by a set of quality agencies, typically (but not always) nationally-oriented. All university-level quality agencies across the EU are or are working towards being members of ENQA, the *European Association for Quality Assurance in Higher Education*. There are 20 Member States with organisations who are members of ENQA – thus 8 countries are still to achieve this status.

Although ENQA held an invitational workshop on quality in e-learning in 2009 (ENQA, 2009), progress since then has been slow, and the recent revision (ENQA, 2014) of the ENQA *Standards and Guidelines*, approved by the Ministerial Conference in May 2015 in Armenia, does not make *explicit* reference to e-learning, or indeed to OER or MOOCs.

There is an argument that can be made that quality guidelines for e-learning (and thence MOOCs, OER etc) do not require a reformulation of the 'standard' quality guidelines, but the danger is that without a reformulation, an *implicit* bias will remain towards the 'presential' learning found in classrooms and seminar rooms. The issues round this point are extensively discussed in Bacsich (2015).

The key point is thus whether this reformulation has taken place, or is taking place fast enough. IDEAL (2015) reports that 'Over 3 million students are currently enrolled in a distance higher education programme in Europe', but the spread between countries across Europe is as yet unclear. However, figures for the number of distance learners in countries such as UK and Sweden and earlier reports on virtual campuses such as the 2009 *Handbook* from the *Re.ViCa* project (Bacsich et al, 2009) make it clear that even five years ago online learning was widespread across Europe, even if (then) only at a small percentage of institutions and for a relatively small percentage of students. However, with only a few exceptions this range of e-learning activity, now beginning to include OER and MOOCs, is not reflected in quality agency reports (Bacsich, 2015).

In the *vocational training sector*, even less progress has been made with integrating e-learning into the quality assurance processes of national agencies. In contrast to the ENQA 2009 seminar on HE, the Cedefop (2009a) report on quality in VET makes no mention of e-learning, or indeed of open, distance or flexible learning. However recently

the Revive VET project has produced a useful set of guidelines (Revive VET, 2015) and the subject is the topic of Workshop II at the EQAVET Annual Forum (EQAVET, 2015).

Note also that QA of VET is integrated with QA of HE in a number of national agencies including Ireland. Additionally, further cooperation between VET and HE quality assurance activities is foreseen (EQAVET, 2014b; section 3.2) – this may lead to a ‘flow’ of HE-derived quality practice into the VET sector and then out to adult education.

How OER can improve the quality of training and education in adult learning?

On this topic there only speculation from general principles; as noted above even in higher education it is just too soon for the quality agencies to be engaging with this topic.

Cost (B3)

How OER can improve the efficiency of training and education in adult learning?

The European Commission (2008), in its *Communication on Efficiency and equity in European education and training systems*, defines ‘efficiency’ rather vaguely as ‘the relationship between inputs and outputs in a process’ but goes on to clarify (slightly): ‘Relative efficiency within education systems is usually measured through test and examination results, while their efficiency in relation to wider society and the economy is measured through private and social rates of return.’

As examples, a French university would be (relatively) more efficient if it could increase the number of graduates per year while still receiving the same funding; an English school more efficient if it could increase the number of A level passes each year. But suppose the English school increased the number of A level passes but the average grade of the passes was lower? Or the French university increased the number of graduates by teaching fewer medical students and many more philosophy students? Thus the issue is more complex than it might seem.

Even within higher education, where there is a strong tradition of educational evaluation, there are not enough case studies done to give a specific answer to the question ‘How OER can improve the efficiency of training and education in university education?’

To the more general question ‘How IT can improve the efficiency of training and education in university education?’ we now have the beginnings of answers. In fact the question is a subset of the standard ‘No Significant Difference’ issue. Bacsich (2012a) observes:

‘it is believed by many academics, and apparently validated by the seminal work of Thomas L. Russell (1999), that the mode of delivery makes no significant difference to the grades or other performance indicators of students... the main thrust of the NSD argument is still accepted by many analysts.’

Yet, the work ‘has several major flaws – in particular many key variables were not controlled. Putting it at its crudest, if students are offered a course, in the majority of cases they will study as much on the course as they think is justified, however well or badly the course is presented: many will aim to pass but not necessarily excel, so that when their effort-grade curve begins to tail off... they will stop studying.’

There are differential effects now beginning to emerge, mainly in the US, but only after years of effort and still with much contestation. In Europe the situation is made worse by a long-standing problem, reported in studies every five years or so since at least 1990, that institutions are very poor at applying costing methodologies to themselves – for OER, e-learning, IT or indeed anything else. Bacsich (2008) for JISC found little trace in UK post-secondary education of the costing models developed in the preceding ten years,

and little evidence of activity elsewhere in Europe. Later, the short report from JISC (2011) on costing models found little recent activity.

However, despite the theoretical issues, gaps in recent research literature and lack of good case studies, there are some points that can be made – justified by the theoretical work for JISC on *Costs of Networked Learning* (Bacsich et al, 1999).

To state the question again, '*How OER can improve the efficiency of training and education in adult learning?*'

In all sectors of education, labour costs are the dominant cost factor year-on-year, whereas development of content should be a one-off cost (like a capital cost), with the proviso that content needs redeveloping every few years. Thus replacement of a fraction of lecturing time by content (whether it be a recording of the lecture or something more sophisticated such as instructional text or interactive multimedia) has the potential to save costs in the longer term (after increased costs in the first year). This in fact is the basic justification behind the original (print-based) open universities of the 1970s. If there are large repositories of OER available anyway, course providers can reduce costs further by selecting, and if needed, adapting, material from these repositories, provided that the selection and adaptation costs are less than starting from scratch, and the selected/adapted material is as pedagogically useful.

One cannot replace all the lecturing time by multimedia since this would mean that there would be no interaction with human tutors in the course and this lack would lead to poor results, especially by learners (common in the adult education scene) who are not fully independent learners.

If one can also share the material across several courses from several providers, the savings are even greater. In the *SharedOER* study, Pepler et al (2015) were tasked to 'make an inventory of the existing cases within the context of formal education ... where a curriculum or syllabus is shared across borders... and consider in particular the OER aspects, existing or prospective.' Although it turned out much harder than expected to find many examples of such sharing *having occurred*, the report identified several useful areas for where it *should occur*. However, these were not actually in the area of *OER textbooks* for school and university courses, often proposed by US commentators. With respect to schools, Pepler et al (2015), quoting OECD (2009) TALIS results, conclude that the degree of standardisation of material in the school system is *much less than some expect*. They further observe that despite 'their potential to reduce costs of education and training (Alqu zar Sabadie et al., 2014)... *there are, as yet, no convincing studies demonstrating whether this can be substantiated.*' Further, 'it should not be forgotten that educational materials (paper-based and digital) amount to much less than 10% of the overall costs of education.' In fact, other calculations they refer to indicate that the figure may be 5% or less.

Some well-known OER experts now hint that the open textbook 'battle' is the wrong battle. Our view would be that considerably more *organisational change* work is needed to bring OER sustainably into school, university and adult education.

It is in specialist areas where the scope is greater. Pepler et al (2015) go on to state: 'Of all the STEM subjects Mathematics is the one which could lend itself most effectively to cross-border curricula and sharing OER across the borders. It is, after all, a universal language...' Closer to the vocational area, 'Another subject area which emerges from the widespread use (and currency) of vendor qualifications is in Computer Science...The ECDL [European Computer Driving License] is a potential vehicle for this; it is already a cross-border curriculum and the development of a wider range of OER to support it would be beneficial.'

4.2.3. Licensing (B0, B1, B5)

Are the Creative Commons licenses the best answer to licensing of open content and in what respect?

In recent years the Creative Commons organisation has spread its affiliates across almost all European countries. In particular 24 out of 28 Member States have Affiliates (Creative Commons, 2015). In the rest of Europe, 11 more countries are members (ibid).

There are still some discussions about the *details* of Creative Commons licenses, in particular their precise adaptation into a specific country's (or region's) legal code. However, one rarely now hears objections to the *principle* of CC from those engaged in OER. The OER community is aware that there are some different license regimes for Open Source, but regard that as an issue for the Open Source community, not for them.

The 'NonCommercial' issue

There is however one area of criticism, the role of the 'NonCommercial' clause. In many Member States, there are both private and public universities, including a few for-profit universities – yet all under the same quality assurance system. In a few Member States or regions of them (England within the UK in particular) the so-called public universities receive a quite small percentage of state funding and compete strongly for international (non-EU) students, charging 'commercial' fees. All this makes it very difficult to argue that one entity is 'Commercial' and another one, doing the same educational task, is 'NonCommercial'. It is a particular issue in the Lifelong Learning Programme (and now in Erasmus+) where commercial companies engaged in LLP projects may not have rights to all the OER material generated by the LLP projects, even though they are operating non-commercially since EU funding rules do not permit profits to be made from grants.

OER Africa (2013) is trenchant: 'At a basic level it is not clear what non-commercial means.' Indeed, 'Critics of the NC clause argue that the clause is harmful... and it hinders the development of new economic models that add value around free content.'

Our view is that this restriction is best avoided. Where others insist on it, the pragmatic interpretation used by the Commonwealth of Learning (as reported in OER Africa, 2013) is the most appropriate (our italics): '...the Guidelines specifically address the issue of the NC clause and make a distinction between profit (commercial) and *cost recovery for operating costs* (non-commercial).'

4.2.4. Knowledge base on adult learning (B0, B9)

Do OER improve the knowledge base on adult learning and contribute to a better monitoring of the adult learning sector? If yes, how?

The usefulness of this question is not obvious. Overall monitoring of the adult learning sector and developing the knowledge base on adult learning is a much wider issue than OER. However, since it was included in the original list we provide a short answer.

If we take this question in the past tense, that is, 'Has OER improved...?', the answer is clearly 'No', since there is so little OER activity in most parts of adult learning and (as noted earlier) even fewer case studies.

For the question in a future tense 'Will it improve?' our view is that it is far too soon to tell – because there is too little data. The MOOC provider *iversity*, along with FutureLearn a leading MOOC provider in Europe, lists on its web site (iversity, 2015) 53 MOOCs. These MOOCs vary in study time, but most require no more than 40 hours of study time, which we shall conservatively estimate as 2 credits in the ECTS scheme. In

contrast the University of Leicester (2015) lists 58 online courses on its distance learning web page either at full Masters level (90 credits) or at Postgraduate Diploma (60 credits). Ignoring the dissertation element (30 credits) of the full masters implies that each of these 58 online courses has 60 credits of taught material, in other words 30 times the study time of one iversity MOOC. Turning it around, **all the MOOCs in iversity** amount to no more than **two** Masters courses at **one university** (the University of Leicester). Given that at least 20 UK universities are large providers of online Masters, the total study time offering of MOOCs is still a very small percentage of total online learning. It will take longer before OER and MOOCs are seen as more than just a 'blip'.

So perhaps the best variant of the question is: '*Could* it improve, and *how?*'

MOOC providers are building up a very good knowledge base of their students but very little research on this is being published. In the next chapter (Recommendations) we shall return to this issue.

In the area of general OER there are more challenges but the topic is within learning analytics. In a specially developed OER repository it is possible for the repository software to handle some of the OER tracking. In contrast, if an open resource is just sitting on the open web – in other words like a file in a directory – then all the tracking has to be embedded *in the OER itself*, using a 'web bug', making it a special kind of OER.) The **Track OER** project in the UK addressed this issue (McAndrew, 2012) and some follow-on work was discussed (Freeair, 2013).

A question relating to the use of OER could be suggested for inclusion in the next Adult Education Survey (believed to be proposed for 2016 – the last one was in 2014 (European Commission/Eurostat, 2014). Formulation of such a question would require background data on OER in adult learning in EU Member States such as in this study.

4.2.5. Participation rates (B0, B9)

How can OER contribute to raising participation rates in adult education?

As noted in the Introduction, one in five adults have low literacy and numeracy skills, one in four have completed lower secondary education at most and one in three have very low or no ICT skills (European Commission/EACEA/Eurydice, 2015a). Moreover there are wide variations between countries. More encouragingly, 2.2% of all adults in the EU participated in a formal or non-formal learning activity with distance learning as the main method of delivery (ibid, pp. 79-80) – this could come to around 7 million learners (worked out from Eurostat, 2014) – but many of the 'courses' could be very short.

In this section we shall focus on the hardest sector for this question, the non-formal adult education sector. Given the lack of OER for that sector, shall also take the question to be a sub-question of the more feasible question:

How can ICT contribute to raising participation rates in adult education?

The main ICT-based adult education initiatives across the EU include (Annex):

- Learndirect, UK
- SOLAS online learning, Ireland
- ICS Learn, Wolsey Hall and Stonebridge, UK – commercial providers
- Klett Gruppe, Germany – commercial provider with focus on VET and private HE
- CNED, France
- NKI Nettstudier, Norway – a traditional commercial provider
- Campus NOOA, Norway – new but growing fast
- ALISON, a MOOC-like provider, Ireland.

Unfortunately there are very few recent evaluation studies of any of these providers and none at all of this learning community. Indeed, a recent report recorded only 64 'virtual colleges' (ISCED level 4 providers) across the world, the majority outside Europe (Pepler & Andries (eds.), 2013, Chapter 2). It should also be noted that in those countries which have a divided higher education sector, case study reports of e-learning in Universities of Applied Sciences (Fachhochschule, Hogskolan, Polytechnics) are also scarce (Lepori & Succi, 2004).

General considerations suggest that the issue is best discussed within the structure of the *Iron Triangle* of Access, Cost, Quality popularised in recent years by Daniel et al (2009) and recently brought into the OER arena by Lane (2014). In adult education we can rephrase this as our hypothesis:

Participation rates in adult education will rise if:

1. **Access** is *made easier* by better guidance, study at convenient times of day and days of week, study in less daunting blocks, and similarity of the learning system to those systems used in daily life (such as Facebook).
2. **Cost**, or apparent cost, is *reduced*, including by *consumer-focussed* aspects such as discounts, payment by instalments, grants, employer support (cash or time off) and use of own equipment, and *producer-focussed* aspects such as lower IT costs (cloud, open source) and lower content costs (finding/adapting OER).
3. **Quality** is *increased* by direct relevance to employability or further study including articulation into vocational and higher education programmes.

Given the lack of case studies, there is little *direct* evidence, for example, that a cost reduction *has led* to an increase of participation (though some evidence of the opposite). However, there is indirect evidence that learners behave according to the above hypotheses. Although relevant EU-wide survey results are not available, the full NIACE 2012 survey for England and Wales (Aldridge & Hughes, 2012, section 5) observes:

'... 39% of adults would be more likely to learn if learning took place at a convenient time or location; 22% if the resulting qualification would benefit them; 20% if they received some form of help from their employer; and 11% if they received support from another individual...'

'... Adults who have not taken part in learning since leaving full-time education (50%) and those who think it unlikely that they would take up learning in the next three years (52%) were most likely to say that none of these factors would make learning more attractive. One quarter of both groups, however, do think that they would be more likely to take up learning if it was made available at a convenient time and location.

'...women placed greater value on the convenience of learning (women 40%; men 37%) as well as on support from others (women 12%; men 10%).'

The 2014 survey (NIACE 2014) gives interesting statistics on employment: 'Nearly four-fifths (79%) of all learners started their learning for work- or career-related reasons. It is unsurprising, therefore, that significant differences exist between the participation rates of workers, unemployed adults and those outside of the workforce....'

Of course there are many barriers to participation. Table 2 in subsection 4.2.8 lists these. The ones of particular focus on students include:

- Difficulties to spread payments of fees and other institution-related costs
- Credit transfer only partly working and credit transfer values discounted from tariff
- Some students are not mature enough to take charge of their curriculum

- Students have concerns that employers may not value flexible learning (especially distance) courses
- Limited selection of offerings
- Slow decision-making on assessment and related processes (resits, extenuation, plagiarism, etc).

4.2.6. Accreditation/validation of skills and competences (B1, B3, B7, B9)

What are the implications for educational planners and decision-makers of use of OER in adult learning? In particular what issues of accreditation/validation of skills and competences acquired via OER could be considered?

We discuss these two questions separately. In fact the first one has already been discussed at the beginning of this section. The following is our response to the second.

What issues of accreditation/validation of skills and competences acquired via OER could be considered (B7, B9)

It is actually most convenient to discuss this in the broader context of skills and competences acquired outside of traditional institutions. This may seem a wider problem but it is actually a more familiar one. In our view, there are two potential mainstream solutions and one other popular but more controversial solution. These are:

1. Challenge exams
2. Accreditation of Prior Learning
3. Badges.

Challenge exams

The term 'challenge exam' is widely used in North America but much less so in Europe even though the approach has been used by the University of London in its International Programme, set up over 150 years ago (University of London, 2008). In its starkest form it means that learners sit the usual examination at the end of a course, *but do not need to attend any of the course*. McGreal et al (2014), citing Conrad et al (2013), observe that 'Challenge-for-credit examinations present an alternative within disaggregated systems that enable learners to prove mastery of a set of learning outcomes by sitting a challenge exam at a reduced fee compared to the full-tuition price of a course.'

The theory is simple, but the reality more complicated. Thus the model is more often found in distance teaching institutions, more used to online examinations or to setting up proctored examinations in centres round a country or beyond. The Athabasca University (2014) brochure for a specific course (Biology) gives a good insight into the complexities.

At school level, in many Member States (those with centralised examination systems for schools), challenge exams are the standard way that students achieve school-leaving and university-entry qualifications. In such countries it is usually possible for students to study 'independently', in other words pay a fee and sit the exam at an exam centre, rather than have to attend a school (Brightside, 2015; Edexcel, 2015). Normally such students are older than compulsory school age, either re-sitting some exams where they got poor grades, or re-entering the school-exam system.

Enthusiasts for challenge exams may forget that in many school and university systems the use of coursework for assessment is routine – and may also forget the many justifications for coursework (increasing predictability of grades, reducing exam stress, suiting some people's learning styles, etc) while dwelling overmuch on the problems (collusion, cheating, help by parents or friends, etc).

Accreditation of Prior Learning

Challenge exams are a special case of Accreditation of Prior Learning (APL), often called Recognition of Prior Learning (RPL). In terms of the procedures used for RPL, McGreal et al (2014) claim that:

'Research shows that the use of learning portfolios in RPL is very popular, followed by examinations that allow learners to challenge-for-credit through assignments, examinations, interviews, courses, tutorials, demonstrations, self-assessment, external evaluations, essays, face-to-face or online workshops, and a variety of other instruments ... *The least frequently used and available... is the option to write a challenge examination* or engage in some other form of challenge-for-credit. Other methods of RPL are much more resource intensive, requiring staff dedicated to spending significant time with prospective students.'

This suggests a degree of systematisation that is not evident in Europe, though information is scarce. Souto-Otero (2012, pp. 17-20) notes: 'In the UK, however, and in contrast to the situation in 6 other European countries... it is not generally possible to obtain full higher education qualifications on the basis of the recognition of prior learning. Moreover... higher education institutions are free to regulate their prior learning recognition systems.'

In the wider adult education field, *Adult Education and Training in Europe* (European Commission/EACEA/Eurydice, 2015a, p. 84) notes:

'Unfortunately, little information is available concerning credit-based qualifications in adult education and training. Indeed, while Cedefop's ECVET monitoring (Cedefop, 2014a) offers insight into the state of development of credit-based programmes, it doesn't specifically mention adult participation in these. Nevertheless, the Eurydice data collection identified recent developments in countries such as Lithuania, Austria and Poland, where the ECVET implementation is under way, and is also being applied to programmes for adults...

The Eurydice data collection on adult education suggests that in nearly half of all countries or regions within countries, programmes up to upper secondary education open to adults are either not yet linked to any credit system... or their application is very limited... In the other half of the education systems studied, credits are applied to at least some qualifications open to adults...'

For basic skills the situation is even worse (our italics).

'Looking more specifically at the basic skills programmes..., the picture is quite clear. Even those [17] education systems where the accumulation of credits seems possible for some adult education programmes... *this does not apply to basic skills programmes*'.

Badges

Badges have been used for many years by youth organisations to give members a physical artefact to recognise and celebrate the acquiring of competences or knowledge. Traditional badges (such as for GirlGuiding UK) have for many years included assessment of competences or knowledge, and are not given just for effort or duration of study.

In recent years, under the impetus of MOOCs and game-based learning, the term is also applied to digital badges. There is now an extensive literature, with the research-based papers in danger of being drowned out by the plethora of predictive articles from Silicon Valley gurus on the 'death of the degree' and the rejoinders to those (e.g. Pianko & Craig, 2012) from other Silicon Valley gurus. From the mass of literature we shall select two insightful articles to illustrate our points.

A team at Swinburne University, including a noted distance learning theorist, provide an excellent scholarly overview (Lokuge Dona et al, 2014):

'Badges represent learners' achievements and serve as an incentive to guide and shape learner behaviour. Educational organisations are considering badges to credential the learning process. Early work demonstrates that awarding badges provides an additional form of reward with the potential to increase learner motivation. Massive Open Online Courses (MOOCs) have become one of the key players in the use of digital badges to engage and motivate learners, to reward participation and recognise the achievement of skills and knowledge. Badges allow MOOC participants to collect recognition of achievement from different learning experiences, leading to a comprehensive set of accomplishments.'

Innovating Pedagogy 2013 (Sharples et al, 2013) confirms that badge technology has come of age: 'In 2013, there are encouraging signs that the tools and infrastructure are improving, with implementations appearing for mainstream learning environments. Educators are increasing their experience of using badging to help courses run successfully online and to motivate learners.'

However, 'Badging implementation requires further development, for example to offer more flexible ways to provide evidence. Lack of structures that can combine badges into a common accreditation framework currently limits their use.'

Ramsden (2015) offers a topical literature search for a broader context. He confirms that institutions should be able now to progress straight to a large scale pilot, if they have top-level institutional support and a clear need, e.g. from local employers (ibid).

Such insights suggest a convergence of badges and so-called traditional assessment, as OER and MOOCs become more integrated with accredited learning. The badging enthusiasts then benefit from the greater focus on quality assurance and enhancement in the accredited education sectors, leading to more confidence in the badges' value; the accredited sectors benefit from novel ways of assessment, the introduction (or re-introduction) of a sense of fun into assessment, the move towards smaller units of assessment (within ECTS or equivalent schemes), and a move gradually away from time-based measures towards competences (Bacsich, 2012a, 2012b, 2012c).

The European scene is perhaps more ready for this move than the US. The *European Diploma Supplement* (European Commission, 2015a) allows more detailed description of accredited programmes and the grades achieved in the assessment.

Some Member States go beyond this: for example the UK has the Higher Education Achievement Report, 'a detailed breakdown of a student's higher education programme, plus the activities they engaged with and that are recognised by their institution' (HEAR, 2015).

4.2.7. Policy tools (B0, B1)

How existing policy tools to support adult learning can best be used for the inclusion of OER?

This question is discussed in Chapter 5 on Recommendations.

4.2.8. Role of educational establishments (particularly universities) in OER-based education (B1, B2, B3)

What is the role of educational establishments (particularly universities) to design, plan and implement education based on OER?

The text of the question indicates a focus on higher education providers (or even on universities specifically, not polytechnics or short-cycle HE providers); however our analysis also applies to formal education providers of VET who have the size, financial capacity and freedom (including from government micromanagement) to have some choice over how they deploy provision, such as CNED (France), Learndirect (UK), Klett (Germany), SOLAS (Ireland) and NKI (Norway). Indeed, we shall use the term 'PSE providers' (post-secondary education providers, covering ISCED levels 4-9) to signify this.

The current role

The country reports for this study (*Annex*, 2015), confirming earlier 2012-14 POERUP country studies, have pointed out the relative lack of OER (and MOOC) activity originating from PSE providers in many Member States. In fairness to the PSE providers, it could be argued that, especially in countries where student fees are zero or minimal, and so the state provides almost all the funding, 'what the state pays for the state gets'. Thus in the absence of a government policy encouraging/funding OER (and very few EU Member States or even regions have such policies), it should not be surprising that PSE providers do not provide OER, either within accredited programmes, or separately. Since many European PSE providers are now short of funds (EUA, 2011), it would be a foolhardy institution that spent money on activities that were not deemed 'necessary'. The Humboldtian idea of the 'union of teaching and research' (Anderson, 2010) would not seem to leave room in its pure form for a social mission to the world. As an aspect of this, part-time adult education in HE has been in decline in some Member States, most visibly in the UK (Callender, 2014) but also elsewhere (Ó Cochláin, 2013).

A justification one increasingly hears for MOOCs, especially from the US, but also the UK, is that MOOCs act as a 'shop window' for a PSE provider and thus students will be more likely to apply to that institution for accredited courses, thus driving up the number of students. However, in most EU Member States, students pay zero or minimal fees (not enough to cover the costs) and the state does not necessarily increase its funding if more students apply. Even if the students are international students (i.e. from outside the EU, EEA and Switzerland), it is only in a few countries (notably Denmark, Ireland, Netherlands, Sweden and UK) that international students pay 'economic' fees (above €9000), i.e. sufficient to recover all costs (Study in Europe, 2014).

The above is a simplistic analysis and does not cover postgraduate programmes, private institutions and specialist subjects (e.g. medicine) where high fees are often charged, but there is not space for a detailed treatment and the general principle does not change.

The 'uni-' role of the university

The country report on Spain (*Annex*, section A.3) noted that most professional adult retraining is conducted *through* higher education providers, with an institution-specific qualification (*título propio*) not recognised outside the institution (in terms of ECTS) – it seems best to regard such 'qualifications' as EQF level 7 in the Skills column (European Commission, 2015b). It is not uncommon for universities in other countries to offer such CPD/CVET, but usually at fee levels sufficient to cover the cost of provision.

It seems much less common for higher education providers to offer vocational training (initial or CVT: ISCED level 4). A small number of UK higher education providers do this, and have done for some years, in particular the Open University, University of Derby, University of West London and University of the Highlands and Islands – but even in the UK it is not common, though it is still common for UK higher education providers (including universities) to offer some short-cycle HE (ISCED level 5). There are theoretical attractions of such ‘multiversity’ (full-service online ISCED 4-8) archetypes (Bacsich, 2012c) but little evidence that they occur much in the EU – though as might be expected, they are more popular in the US (e.g. Edcast, 2015).

In contrast, as in the United States with the community colleges, it is more common for state ISCED 4 providers (called ‘Further Education Colleges’ in the UK) to offer some higher education courses, but usually, in the UK at least, under a devolved accreditation model where a university accredits the HE programmes.

The proposed role

Despite their reluctance (in the EU) to broaden out beyond the Humboldtian role, EU higher education providers are the natural locus for OER and MOOC developments oriented to CVET – both continuous professional development (CPD) and continuous vocational training (CVT) – for adults; and on the whole, when EU higher education providers have produced MOOCs, the students and the institutions seem happy. This puts the onus back on national and regional administrations to foster – which includes funding – such developments – and broaden this out to vocational education providers. So far this funding and broadening out is not happening.

Changing to this role

For some years at EU level and in some Member States there has been a feeling that EU higher education providers are insufficiently flexible in their provision. *The High Level Group on the Modernisation of Higher Education* (2013, 2014) issued reports on *Improving the quality of teaching and learning in Europe’s higher education institutions* and then *New modes of learning and teaching in higher education*, followed by a report on *Access, Retention and Employability* (European Commission/EACEA/Eurydice, 2014c), which also included a chapter on Flexibility.

The Eurydice report in Chapter 3 documents the wide range in provision across Europe. Focussing on ‘Distance learning, e-learning and blended learning’ (Section 3.3, p. 49) it concludes that ‘higher education institutions focusing on the provision of degree programmes through distance learning and e-learning are rare across Europe. They currently exist only in a dozen higher education systems.... In some of them, these specialised providers are mainly small private institutions... , whereas in others, they count among the key players in the system ...’. With respect to more blended provision, it notes (p.51) that: ‘While a few countries or regions within countries... claim that no traditional higher education institution offers this type of provision, a dozen countries report that it is offered by a limited number of institutions. On the other hand, another dozen countries indicate that all or most higher education institutions offer distance learning, e-learning or blended learning. To further complicate the picture, there are a few countries... reporting a limited provision of programmes in conventional universities that are fully delivered through distance learning or e-learning, but there is a significant provision of blended learning, i.e. e-learning integrated in traditional higher education courses.’

The EU Member State reports from the POERUP, Re.ViCa and VISCED projects add much more detail to this general picture.

In Germany there was a federally-funded international study *OPULL (Opening Up Lifelong Learning)* which reported in July 2013 (Köhler et al, 2013).

In the UK the HEA led a substantial programme of collaborative research culminating with an overview report on *Conditions of Flexibility* (Barnett, 2014), supported by several more specialised reports. Barnett's work was particularly useful for positing some of the dilemmas. In particular he noted (p. 7) the underlying tension: 'In a fluid, dynamic and global world, higher education systems cannot but exhibit flexibility and it is right that they should do so; but this dual observation cuts two ways. Too little flexibility and systems will lack the capacities adequately to respond to a changing environment and, ultimately, will start to wilt. Too much flexibility, on the other hand, and systems will lack internal integrity and ultimately might fragment; certainly, they will run risks of lowering standards and failing quality measures.' Following this logic, he proposed 15 Conditions of Flexibility (perhaps best thought of as constraints to unlimited flexibility) to guide institutional change.

The EU and national reports mentioned above have much less to say on *how* the institutions should change to the new structures and processes expected. There is a great lack of information on how to change higher and vocational education institutions to be more flexible and in particular to make more use of e-learning. There is a particular lack of balanced research papers – most reports could be construed as partisan, usually from the change agents, sometimes from their opposition. Many failures of innovation are never documented (Bacsich, 2012b).

For an introduction to some of the organisational change issues one typically faces in introducing more flexible provision, and e-learning in particular, see Bacsich & Pepler (2009). There seem few other public papers on such topics. Further information on change management can be found in section 4.2.6.

The table filling the next page is edited and simplified from Table 7 of Bacsich (2014a), including adaptation from the UK environment to that of a generic Member State. The headings come from the MIT90s scheme for change management (Bacsich, 2006).

This table on barriers seems a good transition point to the policy issues in the next chapter.

Table 1: Barriers to flexible learning

Barriers
Outside the institution
<ul style="list-style-type: none"> • Difficulty in interpreting guidance from ministries on flexible learning – especially hard for small institutions • Difficulties to spread payments of fees and other institution-related costs • Quality and reputational issues with some approaches e.g. Recognition of Prior Learning • Flexible learning courses and their students seen as low-brand • Concerns that flexible learning students have high drop-out – often true, and hard to explain to ministries and ranking sites • Recognition of Prior Learning cumbersome and costly when distributed across sector • Credit transfer only partly working and credit transfer values discounted from tariff • Lack of good knowledge of the audience for other than traditional full-time students • Poor links to local communities and employers from where flexible learning students might come
Strategy
<ul style="list-style-type: none"> • No explicit strategy for flexible learning
Individuals and their roles
<ul style="list-style-type: none"> • Lack of buy-in from top management • Traditional part-time evening teaching not family-friendly for staff • Not enough staff development for staff teaching non-traditional students and courses • In many institutions there is still a lack of comfort in team working • No country-wide forum where teaching staff in flexible learning can get together • Some students are not mature enough to take charge of their curriculum • Students have concerns that employers may not value flexible learning courses (especially distance courses)
Processes
<ul style="list-style-type: none"> • Generally hard to understand documentation of institutional procedures with implicit bias against students other than those full-time on-campus • Difficulty in adapting standard curricula for flexible learning student demographic • Limited selection of offerings • Gap between teaching and research in the subject tends to grow, thus less synergy that staff can exploit • Cumbersome systems for module selection/registration, which tend to be oriented to full-time on-campus students proceeding at semester pace • Slow decision-making on assessment and related processes (resits, extenuation, plagiarism, etc) • Institutional systems (and staff) not suited to dealing with lots of small modules • Work planning model cannot cope with non-traditional teaching approaches (distance, evening, weekend teaching) • Cost basis higher when programmes are disaggregated
Technology – or the lack of it
<ul style="list-style-type: none"> • Many part-time courses are not flexible enough due to lack of online learning • Speed of study not flexible enough (either faster or slower) – move to competency-based required? • Demographic changes (commuting, long working hours, childcare) make traditional ‘two evenings after work’ part-time unviable for students

5. RECOMMENDATIONS TO PROVIDE SUPPORT FOR OER IN ADULT EDUCATION

Existing OER policies

During 2012-2014 the POERUP project spent a great deal of effort tracking existing policies to promote OER in the context of wider changes involving ICT in education, not only across the EU but beyond, such as Canada. In particular, Pepler (2014b) brought together the work of more than 20 staff and consultants on POERUP to produce a magisterial overview of the policy situation in Europe in terms of OER. His conclusions that 'Only a minority of EU countries have any national OER policies' have influenced much of our work. Our own newer research for this study does not challenge his conclusions at the general or indeed the detailed level, or find any separate policy compendium that had not already been taken into account by him.

Pepler's conclusions have seemed surprising to some, used to impressive-seeming numbers of policies on the *OER Policy Registry* (Creative Commons, 2013) but his distinctions between 'actual operating policies' and 'proposals for policies (and aspirations)' make it clear that few 'policies' are actually approved by government, and that many so-called policies are in fact 'initiatives, or programmes' from one or more institutions, not government-level policies (Pepler, 2014b, p. 7). Many of the US and Canada policy entries also evaporate under this scrutiny (ibid, p.27) and by definition, few of these can be nationwide given the federal constitutions of these two nations.

Policies derived from adult education policies

To introduce our analysis it is helpful to begin with using the 13 'Calls' in the *Council Resolution on a renewed European agenda for adult learning* (Council of the European Union, 2011) and then adapt them for OER.

Table 2: How OER affects the 'Calls'

Call	Text	Commentary on inclusion of OER
(i)	enhance the possibilities for adults, regardless of gender and their personal and family circumstances, to access high-quality learning opportunities at any time in their lives, in order to promote personal and professional development, empowerment, adaptability, employability and active participation in society;	OER improve access (provided that ICT access is possible)
(ii)	develop a new approach to adult education and training which focuses on learning outcomes and learner responsibility and autonomy;	the OER and MOOC culture encourages both learning outcomes and learner responsibility/autonomy
(iii)	foster greater awareness among adults that learning is a lifelong endeavour which they should pursue at regular intervals during their lives, and particularly during periods of unemployment or career transition;	OER, especially as embedded in widely-accessed services such as Wikipedia, facilitates informal lifelong learning
(iv)	encourage the development of effective lifelong guidance systems, as well as integrated systems for the validation of non-formal and informal learning;	the OER and MOOC culture helps to foster a culture of validation of non-formal and informal learning

Call	Text	Commentary on inclusion of OER
(v)	ensure the comprehensive provision of high-quality formal and non-formal education and training for adults aimed at acquiring key competences or leading to qualifications at all levels of the European Qualifications Framework (EQF), supported by civil society and the social partners, as well as by local authorities;	OER can be used just as well within formal contexts including for directed independent learning
(vi)	ensure flexible arrangements adapted to different training needs of adults, including in-company training and workplace-based learning;	OER facilitate flexibility (and ICT access is typically easier in workplace situations)
(vii)	foster greater awareness among employers that adult learning contributes to promoting productivity, competitiveness, creativity, innovation and entrepreneurship, and is an important factor in enhancing the employability and labour market mobility of their employees;	the visibility of OER and OER-like services (such as TAACCCT in US and ALISON in EU) fosters greater awareness among employers
(viii)	encourage higher education institutions to embrace less traditional groups of learners, such as adult learners, as a means of displaying social responsibility and greater openness towards the community at large, as well as responding to demographic challenges and to the demands of an ageing society;	OER may encourage further development of this, though several EU countries had active distance and lifelong learning programmes before OER
(ix)	promote the role of social partners and civil society in articulating training needs and developing learning opportunities for adults, as well as optimise the involvement of central, regional and local authorities;	encouraging collaboration of local and regional authorities is key (cf. Common Core for US states)
(x)	promote a balanced allocation of education and training resources throughout the life cycle on the basis of shared responsibilities and strong public commitment, particularly to second-chance opportunities and the development of basic skills;	OER developed in the context of 18-21 full-time university study can be leveraged into lifelong learning use, and vice versa (e.g. MOOCs used on-campus too)
(xi)	involve social partners and raise their awareness of the benefits, also to them, of learning in the workplace, including basic skills provision;	a highly visible OER-based basic skills provision would raise awareness in social partners
(xii)	make well-developed learning provision for seniors, in order to promote active, autonomous, and healthy ageing, and which uses their knowledge, experience, social and cultural capital for the benefit of society as a whole;	OER encourages learning by seniors who do not wish to, or cannot, travel to formal or non-formal study locations; seniors can collaborate in formal and non-formal programmes with learners of other ages
(xiii)	make a strong commitment to promoting adult learning as a means of fostering solidarity between different age groups (for example, by means of an 'intergenerational pact') and between cultures and people of all backgrounds.	(see the last point)

We use this to inform our policy formulation in the next section.

5.1. An integrated approach for the formal education sectors targeting adult education

There is a balance to be struck between the multi-sectoral policy approach of *Opening up Education* (European Commission, 2013a) and the separate sectoral policy approaches of, in particular, POERUP, specifically Bacsich (2013) for HE and Pepler (2013) for VET. The first allows multi-sectoral coverage at the cost of precision of nomenclature; the second allows precision of nomenclature at the cost of lack of synergy between the sectors. In the end we decided that especially in the case of adult education (a somewhat marginal aspect to most policy specialists), the integrated approach was better.

The following recommendations use the POERUP EU-level and generic Member State recommendations of Bacsich (2013) and Pepler (2013) as a *basis* – but have been updated and adapted to ensure that there is a strong prioritisation towards adult learning aspects, in line with the findings of Chapter 4 and the analysis just prior to this section.

Although some of the recommendations do not mention OER as such, it is our view that all will have a catalytic effect on the availability and use of OER. They do not mention additional funding as we judge that this is unrealistic for most Member States in the current circumstances (this study is a research report, not an output from a lobby group) – however, they are designed to make the best use of such funds as there are likely to be, and in particular to increase flexible provision and reduce inhibitors (barriers).

Note on the vocational sector

The vocational sector has rather different interpretations in different Member States – in some like France the public sector institutional component of it is very minimal. Also, the boundary between ISCED 4 (vocational sector) and ISCED 5 (short-cycle HE) is not consistent across countries globally. Nor indeed, is the boundary between ISCED 2 and 3, with vocational courses increasingly found in high schools in many Member States.

In an increasing number of Member States, the quality assurance of the vocational sector is handled by agencies also operating for HE, for example QQI in Ireland and the new quality entity in Malta. Finally the example of the US Community Colleges shows that integrated provision of ISCED 4 and 5, as happens also in some institutions in Scotland, is likely to be a good way forward for Europe.

The recommendations

Quality and accreditation (B0, B7)

- National quality agencies, with support from ENQA (for HE) and EQAVET (for VET) should: Develop their understanding of new modes of learning (including online, distance, OER and MOOCs) and how they impact quality assurance and recognition; Engage in debates on copyright; Consider the effects of these new modes on quality assurance and recognition; and: Ensure that there is no implicit non-evidence-based bias against these new modes when accrediting institutions both public and private including for-profit (if relevant), accrediting programmes (if relevant) and assessing/inspecting institutions/programmes.
- The Commission and related national and international authorities developing the European Higher Education Area (EHEA) and the European Area of Skills and Qualifications should work towards reducing the regulatory barriers against new non-study-time-based modes of provision: in particular by developing successors to Bologna (HE) and Copenhagen (VET) based primarily on competences gained not duration of study.

- Member States should more strongly encourage (not excluding financial measures) HE and VET providers (especially large state-funded providers) to improve and proceduralise their activity on APL (Accreditation of Prior Learning) including the ability to accredit knowledge and competences developed through online study and informal learning, including but not restricted to OER and MOOCs
- Larger Member States should set up an Open Accreditor to accredit students for HE studies which could accrue to a full undergraduate degree and a parallel model, perhaps via 'one stop shops', to accredit vocational competences
- Member States via their accreditation and quality agencies, should in a phased way reduce the regulatory barriers against new kinds of HE and VET providers, including private non-profit, consortial, out-of-country and commercial.

Staff development (B0, B6)

- Member States, with support from the Commission, should support the development of online initial and continuous professional development programmes for teachers/trainers/lecturers, focussing on online learning with specific coverage of distance learning, OER, MOOCs and other forms of open educational practice. These programmes should be available to staff in all kinds of post-secondary public providers and must place open education in the wider context of use of ICT for education & training especially but not only for distance teaching.
- Member States, with support from the Commission, should educate institution staff on IPR issues.
- Member States should consider the use of incentive schemes for teachers/trainers/lecturers engaged in online professional development of their pedagogic skills including online learning.

OER and IPR (B0, B5)

- The Commission and Member States should adopt and recommend a standard Creative Commons license for all openly available educational and vocational training material they are involved in funding.
- The Commission and Member States should support the development of technological methods to provide more and standardised information on IPR to the users of digital educational and vocational training content, whether or not it is OER.
- With support from the Commission, groups of Member States should work on the creation of standardised syllabi EU-wide for certain topics where this is appropriate for transnational action; and in the light of a successful outcome to such initiatives, foster the developments of common bases of OER material to support these standards, including relevant open repositories and (ideally jointly with publishers) open textbooks. Such topics could include mathematics, IT (ECDL and coding) and second language learning.
- The Commission should mandate and enforce that any public outputs from its programmes (specifically including Erasmus+ and Horizon, and the LLP programme) are made available with all due speed as open resources under a Creative Commons license, and reinstate material that vanishes later.
- Member States should likewise mandate and enforce that any public outputs from their national research and education/vocational development programmes are made available as open resources under a Creative Commons license; these outputs should include a year-by-year increasing fraction of all institution-generated teaching resources produced using public funds.

- Member States should **phase out use of the 'NonCommercial' restriction on content.**

Costing and other research (B0, B3)

- Member States should increase their scrutiny of the cost basis for university teaching and vocational training and consider the benefits of different modes of funding for their institutions (e.g. more based on outputs, such as qualifications and competences, than inputs, such as contact hours and study hours).
- Member States, with support from the Commission, and acting transnationally when appropriate (e.g. where funding regimes are similar across groups of Member States), should fund research into the verifiable benefits of OER, with greater efforts to integrate such analyses with ongoing research on distance learning, on-campus online learning, and pedagogy. This research should include case studies of the existing successful higher education and vocational training providers that teach online in a substantial way using OER and other methods of open education (including but not only MOOCs).

5.2. Non-formal and informal learning sectors

The previous recommendations were institution-focussed, for adult *education*. We feel it is important to have recommendations which are *person-focussed*, thus for adult *learning*. Some of these can be derived from the POERUP policy work of Phillips & Pepler (2014) and SharedOER but reoriented to adult learning rather than to pupils in schools.

Focus on students (B0, B9)

- Member States should promote (within the context of their sovereign educational aims and objectives) to adult learners the availability and accessibility of open resources created through their respective cultural sector programmes.
- Member States should encourage Municipalities to ensure any outputs from their teachers and schools are made available as open resources under a Creative Commons license, especially where these support examinations taken by adults as well as school-age students.
- Specific funding should be devoted to building OER corpora of material in key topic areas of interest to adults. The corpora should be designed ideally for independent self-study, guided self-study (in both the formal and informal sector) and as resources to support lecturers teaching such courses. This maximises the investment in them. Rather than just 'silent' textual materials, the materials should contain audio-visual elements and, for hard to learn concepts, interactive components and quizzes. This to some extent will overcome the barriers that can be found to studying textual material by those whose reading skills in the national language(s) may be less adequate. The areas should include:
 - a. Basic Skills: Literacy and Numeracy
 - b. Other-language skills, including national language skills for immigrants and second-language skills for citizens (including Less Used Languages)
 - c. General work skills: employability, team work, creativity
 - d. 21st century skills in ICT (search, report writing, presentations, etc)
 - e. Study skills, including for future vocational/professional development and university study

5.3. Linking the sectors

Currently, face-to-face guidance for adults offered outside public employment services is limited (European Commission/EACEA/Eurydice, 2015a, p. 12) and not likely to grow; yet integrated provision of different lifelong learning services at 'one stop shops') has attracted significant attention from policy makers and pilots in a few countries (ibid, p.113).

To bring the formal and informal sectors into full synergy we recommend extending this approach across all Member States to develop **accreditation gateways**, so that a learner can visit the accreditation gateway to get advice and support as to the value, in EQF terms relevant to their country, of their pre-existing learning and skills, before they move into the accredited learning sector.

We do not foresee the march of technology as delivering an automated online service except possibly to indicate a minimum number of points that previous accredited learning would be worth. Similarly until credit transfer is better developed across Europe, the points value of their pre-existing learning and skills will depend on the institution, or type of institution, that they intend to apply to. This all implies to us that the accreditation gateways will continue to be human-staffed locations which learners will have to visit. Since there are considerable economies of scale to be achieved by proceduralising such work; in reality they are likely to be found in cities, perhaps co-located with large education providers. (See the earlier discussion on the Open Accreditor and in section 4.2.6.)

The issue of how to fund such gateways, especially from state sources, requires discussion beyond this report, but in general terms it could be argued that a learner who has accrued an EQF points value largely by their own efforts has saved the state money by so doing. In our view, the discussion is best taken forward within the context of Member States moving towards some kind of guarantee of support for post-secondary education (and catch-up secondary education) for *all its citizens*, just as they do now for compulsory school education. Thus our final recommendation is that:

- the scarce funding for supporting adult learners should increasingly be targeted in an *output-based fashion* to reward adult learners for progression through the EQF. The accreditation gateways (one stop shops) could play a key role in this process. It is recognised that for this to work well, it needs a more developed and pervasive EQF than currently exists, but such an EQF is already one of the aims of the European Union.

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7. GLOSSARY AND BIBLIOGRAPHY

7.1. Glossary of acronyms and their URLs

- A level – <http://www.cie.org.uk/programmes-and-qualifications/cambridge-advanced/cambridge-international-as-and-a-levels/>
- ALISON – <https://alison.com>
- APL – Accreditation of Prior Learning, https://en.wikipedia.org/wiki/Alternative_pathways_in_education
- Bachillerato – <http://www.mecd.gob.es/educacion-mecd/areas-educacion/sistema-educativo/enseanzas/bachillerato.html>
- BIBB – <http://www.bibb.de/en/>
- BIS – <https://www.gov.uk/government/organisations/department-for-business-innovation-skills>
- Bologna Process – http://ec.europa.eu/education/policy/higher-education/bologna-process_en.htm
- Campus NOOA – <http://campus.nooa.info/?lang=en>
- Cedefop – <http://www.cedefop.europa.eu>
- CIDEAD – <http://www.cidead.es>
- Citizen Maths – <https://citizenmaths.com>
- CNED – <http://www.cned.fr>
- Copenhagen Process – <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=URISERV:ef0018>
- CPD – Continuing Professional Development
- CULT – <http://www.europarl.europa.eu/committees/en/cult/home.html>
- CVET – Continuing Education and Training
- CVT – Continuing Vocational Training
- E-xcellence – <http://e-xcellencelabel.eadtu.eu>
- EADTU – <http://www.eadtu.eu>
- ECDL – <http://www.ecdl.com>
- ECVET – <http://www.ecvet-team.eu/en>
- EHEA – European Higher Education Area, <http://www.ehea.info>
- eMundus – <http://wikieducator.org/Emundus/Home>
- ENOA – <http://www.engq.eu>
- EPALE – <https://ec.europa.eu/epale/>
- EQARF – <http://www.ecvet-team.eu/en/system/files/documents/2650/eqavet-deskriptoren.pdf>
- EQAVET – <http://www.eqavet.eu/gns/home.aspx>
- ET2020 – http://ec.europa.eu/education/policy/strategic-framework/index_en.htm
- EuBIA – <http://www.bia-net.org/eubia>
- European Area of Skills and Qualifications – http://ec.europa.eu/dgs/education_culture/more_info/consultations/skills_en.htm
- Europeana – <http://www.europeana.eu/portal/>
- Eurostat – <http://ec.europa.eu/eurostat>

- Eurydice – http://eacea.ec.europa.eu/education/eurydice/index_en.php
- FutureLearn – <https://www.futurelearn.com>
- GirlGuiding UK – <http://www.girlguiding.org.uk/home.aspx>
- HE – higher education (ISCED 5-8)
- HEA – <https://www.heacademy.ac.uk>
- HEAR – <http://hear.ac.uk>
- ICS Learn – <https://www.icslearn.co.uk>
- IDEAL – <http://idealproject.eu>
- IPTS – <https://ec.europa.eu/jrc/en/institutes/ipts>
- ISCED – <http://www.uis.unesco.org/Education/Pages/international-standard-classification-of-education.aspx>
- iScoil – <http://www.iscoil.ie>
- iversity – <https://iversity.org>
- Klett Gruppe – <http://www.klett-gruppe.de/home/our+business+units/adult+and+continued+education.772.htm>
- LangOER – <http://langoer.eun.org>
- Learndirect – <http://www.learndirect.com>
- LUOERL – <https://www.heacademy.ac.uk/node/3854>
- Minerva – <https://www.minerva.kgi.edu>
- MOOC – http://www.openeducationeuropa.eu/en/european_scoreboard_moocs
- NIACE – <http://www.niace.org.uk>
- NKI – <http://www.nki.no>
- NMC – <http://www.nmc.org>
- NVAO – <http://nvaio.com>
- NVL – <http://www.norden.org/en/nordic-council-of-ministers/council-of-ministers/nordic-council-of-ministers-for-education-and-research-mr-u/institutions-co-operative-bodies-working-groups-and-projects/working-groups-and-boards/nordic-network-for-adult-learning-nvl>
- OER Africa – <http://www.oerafrica.org>
- OER u – <http://oeru.org>
- OERUp! – <http://www.oerup.eu/home/>
- OFSTED – <https://www.gov.uk/government/organisations/ofsted>
- OPAL – <http://www.open.ac.uk/iet/main/research-innovation/research-projects/open-educational-quality-initiative-opal> (project website now inactive)
- OpenCred – <http://is.jrc.ec.europa.eu/pages/OpenCred/ISUNITWEBSITE-IPTS-JRC-EC.htm>
- OpenDOAR – <http://www.opendoar.org>
- OPULL – <http://www.leuphana.de/en/institutes/ipm/research/opull.html>
- Pick&Mix – <http://bela.referata.com/wiki/Pick%26Mix>
- POERUP – http://poerup.referata.com/wiki/Main_Page
- POERUP OER Map – <http://www.poerup.org.uk>
- QAA – <http://www.qaa.ac.uk/en>
- Re.ViCa – <http://www.virtualschoolsandcolleges.eu/index.php/Re.ViCa>
- Revive VET – <http://www.reviveproject.eu/vet/>

- RPL – Recognition of Prior Learning, https://en.wikipedia.org/wiki/Alternative_pathways_in_education
- SEQUENT – <http://sequent-network.eu>
- SharedOER – <http://poerup.referata.com/wiki/SharedOER>
- SigMath – <http://sigmath.eu/en/>
- SOLAS – <http://solas.ie>
- SPOC – https://en.wikipedia.org/wiki/Small_private_online_course
- Stonebridge – <https://www.stonebridge.uk.com>
- TALIS – <http://www.oecd.org/edu/school/talis.htm>
- Track OER – <http://track.olnet.org>
- Ufi – see *learnirect*
- UniversityNow – <http://unow.com>
- UUK – <http://www.universitiesuk.ac.uk>
- VET – Vocational Education and Training (ISCED 4)
- Wolsey Hall – <http://wolseyhalloxford.org.uk>

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ANNEX: COUNTRY REPORTS (EDITED BY GILES PEPLER)

This Annex contains the eight commissioned EU Member State reports, plus brief reviews of nine other Member States, concluding with a review of the most relevant non-EU countries to the agenda: Norway, US and Canada.

All reports were edited by Giles Pepler.

The report authors made use of POERUP country reports and SharedOER reports¹ but had to substantially extend the coverage of these into adult education.

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A.1 United Kingdom, by Sara Frank Bristow

The United Kingdom of Great Britain and Northern Ireland – commonly known as the United Kingdom (UK), or Britain – includes the island of Great Britain, the north-eastern region of the island of Ireland and several smaller islands. Northern Ireland is the only part of the UK with a land border, shared with the Republic of Ireland.

The United Kingdom is a political union of four 'Home Nations': England, Northern Ireland, Scotland and Wales.² The UK is both a parliamentary democracy with its seat of government in London, the capital, and a constitutional monarchy, with the Queen as the head of state. The Crown Dependencies of the Channel Islands (Guernsey and Jersey) and the Isle of Man, are not part of the UK but form a federacy with it.

The UK has four distinct regional education systems, with formal education policy devolved to the Home Nations (the UK government is responsible for England). Responsibility is delegated to individual parliaments or National Assemblies. This is a time of flux for education in the United Kingdom, with national strategies being debated and curricula being updated in real time; despite a rapidly changing context for policy development, this report seeks to capture an accurate portrait of education in 2015.

¹ http://poerup.referata.com/wiki/Country_reports and <http://poerup.referata.com/wiki/SharedOER>

² A Scottish independence referendum took place in Scotland on 18 September 2014, with Scotland voters ultimately determining that Scotland would not become an independent country.

Each home nation has a Department or Ministry (and sometimes more than one) for education.³ **Some developmental or regulatory agencies – in particular the Quality Assurance Agency for Higher Education (QAA), the Joint Information Systems Committee (JISC) and the Higher Education Academy (HEA)⁴ – are shared across the four home nations, but with significant degrees of local autonomy.**

The last UK census (2011) found that 83.9% of its population resided in England, 8.4% in Scotland, 4.8% in Wales, and 2.9% in Northern Ireland. This country profile reflects this distribution, focusing primarily on the more populous nations.

As in federalised countries like Canada and the United States, the various education systems in the Home Nations are already significantly and increasingly different. In each country there are five stages of education: early years, primary, secondary, further education and higher education.

England

The Department for Education is responsible for education and children's services in England. The education system is divided into stages by student age:

- Early Years Foundation Stage (ages 3–5)
- Primary Education (ages 5–11)
- Secondary Education (ages 11–18)
- Tertiary Education (ages 18+)

Children ages five to 16 in 'maintained' or state schools must be taught the National Curriculum. Pupils progress to secondary education upon completion of primary schooling without examinations, but throughout both primary and secondary phases there are formative National Curriculum assessments (colloquially known as SATs) which measure the attainment of children attending maintained schools. In January 2014 there were 24,347 schools in England (both state funded and independent), serving 8.3 million pupils. In secondary education, core subjects are taught for the first two years and a selection of electives are introduced thereafter, culminating in General Certificates of Secondary Education (GCSEs).

From the age of 16 there is a **two-year period of further education (FE) known as 'sixth form' or 'college', which typically leads to either A-level qualifications or a number of alternate qualifications.** Students may explore Apprenticeships, 14 to 19 education and training for work. There were 336 colleges in England as of January 2014 (of 384 total in the UK). Further education courses may also be studied by adults over 18. (Adult education is examined more explicitly below, as are Open Educational Resources in that context.) Higher education is provided by universities, university colleges, colleges of education and general further education (GFE) colleges. Many students pursue **three-year-long bachelor's degrees; postgraduate degrees include master's degrees, either taught or by research, and the doctorate, a research degree that usually takes at least three years.**

Most English primary and secondary schools and funded by the state, and are regularly inspected by the Office for Standards in Education (Ofsted), a non-ministerial department of the UK government. The Education Funding Agency manages £54 billion of annual funding to support state-provided education for 8 million children aged 3 to 16, and 1.6 million young people aged 16 to 19. Funding for sixth form and further education colleges comes from the Skills Funding Agency (at more than £4 billion per year), which also funds some training organisations and employers. These state-funded education entities

³ See <https://www.gov.uk/government/organisations/department-for-education> (England), <http://www.gov.scot/Topics/Education> (Scotland), <http://gov.wales/topics/educationandskills/> (Wales), and <http://www.deni.gov.uk> (Northern Ireland).

⁴ See <http://www.qaa.ac.uk/>, <http://www.jisc.ac.uk/> and <https://www.heacademy.ac.uk/>

are regularly inspected by the Office for Standards in Education (Ofsted), a non-ministerial department of the UK government.

Adults over the age of 18 are eligible for grants, bursaries and loans when pursuing courses and training which is not formally part of a higher education (HE) degree (e.g. undergraduate or postgraduate). In particular, students between 19-24 and studying for their first qualification equivalent to GCSE or A level may not be subject to tuition fees.

Funding for higher education is distributed by the Higher Education Funding Council for England (HEFCE), totalling £3.8 billion to 130 universities and higher education colleges and 212 further education colleges for the academic year 2014-15. The Quality Assurance Agency for Higher Education (QAA) is an independent body entrusted with monitoring, and advising on, standards and quality in UK higher education.

Students in England may pay up to £9,000 in annual tuition costs for full-time higher education. Amidst much political turmoil, tuition fees were first introduced in 1998, at £1,000 per year, and have gradually increased. A typical student finance package is dependent upon household income, and comprises tuition fee loans (for courses) and maintenance loans and/or grants (for living costs). Additional funding is available for those who are disabled and/or have children. Higher education bursaries, scholarships and awards may also be awarded directly by each college or university.

In 2013-14, there were 1.3 million full-time and 556,000 part-time British students at UK universities.⁵

Wales

The Welsh education system was devolved to Wales when the Welsh Assembly came into being in 1999. Welsh students participate in education as follows: Foundation Phase (ages 3-7); Primary Education (ages 7-11); and Secondary Education (ages 11-16). Education is compulsory until the age of 16. A Learning Pathways 14 to 19 programme (ages 14-19) includes both academic and vocational options.

As in England, Welsh students are taught a National Curriculum. A significant number of students are educated either wholly or largely through Welsh; Welsh medium education is available to all age groups through nurseries, schools, colleges and universities and in adult education. Lessons in the language itself are compulsory for all pupils. In 2013 the Welsh Government pursued an independent review of qualifications for 14-19 year olds, and will be adjusting qualifications for courses starting in September 2015.

Wales had 1,703 schools (either maintained by a local authority or independent) serving 473,684 students as of January 2014. 30% of these delivered education in the Welsh medium in 2013. Wales has 13 further education colleges (following numerous mergers since 2010) and nine universities.

Estyn, the office of Her Majesty's Inspectorate for Education and Training in Wales, inspects quality and standards in education and training providers in Wales. It is responsible for schools across all sectors and phases of education, including further education institutions. At higher education level, the funding body is the Higher Education Funding Council for Wales (HEFCW). The Quality Assurance Agency has a separate Welsh office devoted to the needs of higher education in Wales.

As in England, publicly-funded universities or colleges may charge up to £9,000 per year in tuition fees. Extra support may be available for students that have dependents or a disability. Students may apply for learning grants and/or maintenance loans to assist with living costs.

⁵ <http://www.bbc.com/news/education-31697187>

Scotland

In July 2011 Education Scotland was charged with supporting quality and improvement in Scottish education. The Scottish educational progression is logistically similar to the English one, with most students proceeding through Early Years (ages 3-5), Primary Education (ages 5–11), and Secondary Education (ages 11–16). Compulsory education **concludes at age 16, though students 'should receive an offer of post-16 learning which will develop their skills for learning, life and work.'**

As of December 2013 there were 2,569 primary, secondary and special schools in Scotland serving a total of 673,530 students. Scotland has its own curriculum, however, **the Curriculum for Excellence. This is based on 'experiences' and 'outcomes' rather than the statutory National Curriculum introduced in the rest of the UK following the Education Reform Act 1988. Pupils sit 'Standard Grade' examinations rather than GCSEs, and 'Highers' rather than A levels. Gaelic Medium Education is available in 14 out of 32 Scottish local authorities, across about 60 primary schools and their associated secondaries in Scotland (including dedicated Gaelic Medium schools).**⁶

As in the rest of the United Kingdom, further education is typically a means to begin a specific (e.g. vocational) career path, or to attain an intermediate qualification in order to attend university. Scotland has 25 colleges funded by the Scottish Further and Higher Education Funding Council, or Scottish Funding Council (SFC).

There are 19 universities and higher education institutions supported by the SFC, which is responsible for funding teaching and learning provision, research and other activities. The Scottish Qualifications Authority (SQA) has two main roles: accreditation, and awarding qualifications.

Education Scotland is the public body charged with supporting quality and improvement across Scottish education (e.g. through schools inspections and reporting). A memorandum of Understanding between SFC and Education Scotland also charges the latter with external reviews of colleges. In higher education, the Quality Assurance Agency has a separate Scottish office (QAA Scotland) devoted to the needs of higher education in Scotland.

Eligible Scottish domiciled students studying full-time in Scotland are not required to pay tuition fees if studying for a first degree or equivalent (unless studying elsewhere in the UK). Student loans and bursaries for living costs are available based on household income.

Northern Ireland

Education in Northern Ireland is more like that of England and Wales than that of Scotland; in addition to adhering to a National Curriculum, schoolchildren take GCSE and A levels. There are differences, however, as Northern Ireland remains the largest area in the UK which still operates grammar schools (secondary schools for which pupils sit academic selection exams). Many of these are Catholic-maintained schools. Irish-medium education is education provided in Irish speaking schools; in 2012-13 there were 29 Irish-medium schools and ten Irish-medium units attached to English-medium host schools, serving 4,633 pupils. The Department of Education has a duty to encourage and facilitate the development of Irish-medium education.⁷ Publicly funded schools follow the Northern Ireland Curriculum.

⁶

<http://www.educationscotland.gov.uk/parentzone/myschool/choosingaschool/gaelicmediumeducation/index.asp>

⁷ http://www.deni.gov.uk/index/schools-and-infrastructure-2/schools-management/10-types_of_school-nischools_pg/schools_-_types_of_school-irish-medium_schools_pg.htm

In 2014/15 there were 338,000 children in schools across Northern Ireland. In total, 175,000 children attended primary schools (including nursery units).⁸ Northern Ireland had six colleges as of January 2014. Further education colleges offer a range of academic, vocational and leisure courses. Higher Education in Northern Ireland is overseen by the Department for Employment and Learning Northern Ireland (DELNI). As in the rest of the UK, quality assurance for HEIs in Northern Ireland is overseen by the Quality Assurance Agency (QAA).

For those under 19, full-time further education courses have no associated tuition fees; certain vocational full-time courses for those over 19 may also be free of charge. An Education Maintenance Allowance for living expenses is available to eligible applicants, as are hardship and childcare assistance funds.

Universities in Northern Ireland may charge residents up to £3,805 for tuition fees. Students pursuing higher education degrees may apply for student loans, scholarships, bursaries, awards or grants.

Adult Education in England

The National Institute of Adult Continuing Education (NIACE)⁹ is an educational charity in England and Wales. Founded in 1921, the organisation is the main advocacy body for adult in England and Wales (with a focus on community learning). The 'national voice for lifelong learning', NIACE promotes the study and general advancement of adult continuing education by improving the quality of opportunities available, by increasing the number of adults engaged in formal and informal learning, and by widening access for those communities underrepresented in current provision. NIACE organises an Adult Learners' Week, a national celebration of lifelong learning now in its 24th year.¹⁰

Community Learning¹¹ includes a range of community-based and outreach learning opportunities. Many are provided by local authorities and further education colleges (further education providers). Other organisations involved in community learning are in the Third Sector, and as such learning is one component of their offerings. Community learning funding may emanate from government departments including Business, Innovation and Skills (BIS); Cabinet Office; Health; Work and Pensions; and Communities and Local Government but central government funding is decreasing and being increasingly replaced by fees and student loans.¹² NIACE provides an overview of currently relevant policy, funding and guidance documents impacting Community Learning in a rapidly evolving sphere.¹³

In particular, **BIS Community Learning** has funded a range of flexible courses, usually unaccredited, for adults aged 19 and over. These courses and activities are designed to help individuals of different ages and backgrounds acquire a new skill, re-connect with learning, pursue an interest, prepare for formal courses and/or learn how to better support their children. In April 2012, 15 provider partnerships were selected to develop and try out new approaches to planning, funding and delivering community learning, with pilots evaluated in early 2014.¹⁴

In May 2012, the Skills Funding Agency launched an effort to support new learning opportunities, particularly for the disadvantaged, the £4 million **Community Learning**

⁸ <http://www.nisra.gov.uk/publications/default.asp6.htm>

⁹ <http://www.niace.org.uk/>

¹⁰ <http://www.alw.org.uk/>

¹¹ Prior to 2010, Community Learning was known as Informal Adult and Community Learning, and previously as Adult and Community Learning.

¹² <http://www.communitylearningchampions.org.uk/sites/default/files/downloads/CLR%20briefing%20paper.pdf>

¹³ <https://www.niace.org.uk/community-learning/resources/community-learning>

¹⁴ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/284119/bis-14-602-community-learning-trust-clt-pilot-evaluation.pdf

Innovation Fund (CLIF).¹⁵ SFA appointed NIACE with responsibility for managing the Fund. As of January 2014 NIACE had funded 97 projects across England, engaging over 15,000 learners; provision focused on health, families, digital inclusion, employability, volunteering and socially vulnerable groups.

Further Education colleges are responsible for a significant proportion of formal Adult Education provision in England, educating over 3.1 million people annually, including 2.2 million adults. In 2012-13 there were 336 colleges in England, including 243 further education colleges (FE) and 93 sixth form colleges; 18% of learners were between the ages of 19 and 24, and 48% of learners were between 25 and 59. 35% of all vocational qualifications are awarded via colleges (7% are awarded through employers). 54% of large employers who train their staff do so through a college; 73% of English for Speakers of Other Languages (ESOL) students study in colleges.¹⁶ Nevertheless, funding for non-apprenticeship adult further education in England will be decreasing by 24% in 2015-16.¹⁷

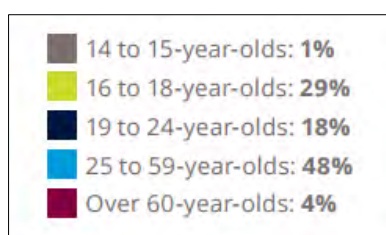


Fig. 1. Students in colleges by age (2012-2013), from Association of Colleges Key Facts

Further Education includes any study after secondary education that is not part of higher education. Colleges are grouped in five categories: General Further Education Colleges (GFE), Sixth Form Colleges (SFC), land-based Colleges (AHC), art, design and performing arts Colleges (ADPAC), special designated Colleges (SD). Courses may range from basic English and maths to Higher National Diplomas (HNDs); FE also includes technical level qualifications and applied general qualifications, which replace diplomas and vocational qualifications. Individuals under 24 studying for their first qualification equivalent to GCSE or A level may not have to pay for tuition.

As a recent BIS study finds that close links between FE colleges and local employers have led to increased higher education provision in further education colleges:

*Most college-taught courses of higher education – but not all – lead to qualifications at levels below the Bachelor’s Degree... much of this provision is studied on a part-time basis, often by adults in employment and sometimes in conjunction with employers for the continuing professional education of their employees.*¹⁸

144,000 students studied higher education in a college in 2012-2013.

The **FE Choices** portal, part of the Further Education Public Information Framework, clarifies the many post-16 FE education options for students. An offering of the **Skills Funding Agency**,¹⁹ it connects adult learners to several key resources:

- **The National Careers Service**,²⁰ which provides information, advice and guidance on postsecondary learning, training and work opportunities. The service offers confidential and impartial advice, supported by qualified careers advisers.

¹⁵ See <http://www.niace.org.uk/current-work/clif/community-learning-innovation-fund>

¹⁶ <http://www.aoc.co.uk/sites/default/files/AOC%20KEY%20FACTS%202014.pdf>

¹⁷ <http://www.bbc.com/news/education-31697187>

¹⁸ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/32425/12-905-understanding-higher-education-in-further-education-colleges.pdf

¹⁹ <https://www.gov.uk/government/organisations/skills-funding-agency/about>

- **Apprenticeships** (for ages 14-19),²¹ for which learners may apply directly through a government web site; and **Traineeships**²² (for ages 16-24), whose listings learners may browse directly.
- **Funding guidance**,²³ e.g. for adult learners who can apply for grants and bursaries to help pay for courses and training help. The **24+ advanced learning loans**,²⁴ for example, are now available for eligible mature students to help with the costs of college or training courses. A bursary fund may also help with living costs, childcare or accommodation expenses.

Data about participants in further education and work-based learning in England is collected in an **Individualised Learner Record (ILR)**.²⁵ The data is collated by the government to monitor policy implementation and the performance of the sector.

The Open University (OU)²⁶ is perhaps the best-known higher education provider in England, offering open enrolment through distance education (its links to OER are explored below). The OU offers a range of first degree courses in distance learning format, many of which are in vocational subjects. Courses may be taught in standard format, or credit awarded for 'experiential learning' (i.e. experience gained in one's field). The latter assumes substantial recent experience of, and theoretical knowledge of, one's field.²⁷ Since the OU's launch in 1969, it has served 1.89 million individuals worldwide. Over 75% of OU students work part or full time during their studies; the average age of enrolling undergraduate is 29. The university offers 374 undergraduate modules, 159 postgraduate modules, 44 overseas versions and 20 curriculum partnerships. At the time of writing it had approximately 200,000 students.²⁸ It is not an inexpensive option, however: the cost of full time OU study is £5400 per year.

Special interest advocacy groups and professional organisations are cornerstones of reskilling and upskilling workers through Adult Education at the individual level. For example, **UK Online Centres** help adults learn to use computers and the internet confidently; **unionlearn**²⁹ works closely with unions to provide learning opportunities for its members; the **Prisoners' Education Trust**³⁰ ensures access to broader education opportunities for prisoners. Professional organisations also take an interest in reskilling or upskilling their workforce through Continuing Professional Development (CPD), such as the **Foundation Professional Membership Service (FPMS)**³¹ for individual teachers and other educators.

Additional options are available through numerous entities which target the Adult Education sector (e.g. Borough and County Councils, universities and, most recently, private for-profit providers – see a recent (2013) BIS report³² reviewing their penetration of UK higher education). An increasing number of options are available through distance learning FE colleges and distance learning providers like the **National Extension College (NEC)**,³³ an educational charity which is part of the **Open School Trust**.

²⁰ <https://nationalcareersservice.direct.gov.uk/advice/courses/whylearn/Pages/default.aspx>

²¹ <https://www.gov.uk/further-education-skills/apprenticeships>

²² <https://www.gov.uk/government/collections/traineeships-programme>

²³ <https://www.gov.uk/grant-bursary-adult-learners>

²⁴ <https://www.gov.uk/advanced-learning-loans/overview>

²⁵ http://en.wikipedia.org/wiki/Individualised_Learner_Record

²⁶ <http://www.open.ac.uk/>

²⁷ <http://www.eadtu.eu/home/policy-areas/lifelong-learning/publications/127-showcases-of-university-strategies>

²⁸ <http://www.open.ac.uk/about/main/strategy/facts-and-figures>

²⁹ <https://www.unionlearn.org.uk/>

³⁰ <http://www.prisonerseducation.org.uk/>

³¹ <https://www.ifl.ac.uk/our-work/about-fpms/>

³² https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/207128/bis-13-900-privately-funded-providers-of-higher-education-in-the-UK.pdf

³³ <https://www.nec.ac.uk/>

Virtual learning provision is exceedingly and increasingly popular across the FE and HE sectors in particular. Nine percent of respondents to a recent **Association for Learning Technology (ALT)** survey of active members of the community of educators using technology (on the effective use of learning technology in education) were working specifically in Adult Education.³⁴

Adult Education in Wales

In Wales, as in England, NIACE is the national organisation for advancing adult learning.³⁵ **NIACE Cymru** is responsible for work in Wales through a dedicated Cardiff Office. Through NIACE, Wales engages in European study and collaboration (e.g. the Lifelong Learning Programme's Grundtvig Programme).³⁶

Adult Community Learning (ACL) is defined as 'flexible learning opportunities for adults, delivered in community venues to meet local needs'; it embraces learning opportunities which are offered by further education (FE) and higher education (HE) institutions and local authorities.³⁷

A range of vocational qualifications are available under the Credit and Qualification Framework for Wales (CQFW), which recognises all learning that takes place in schools, Further Education, Higher Education and Work-Based Learning.³⁸ CQFW seeks to enable recognition and comparison of achievements from all types of education and training activity, allowing all learning activity be accredited – including that which takes place in the community, through volunteering and through employer's in-house training and CPD programmes. A Unique Learner Number (or ULN) allows all learning achievement to be electronically stored in a Personal Learning Record (PLR), accruing a lifelong record of achievement.

Relevant organisations include:

- **National Training Federation of Wales**³⁹
- **Careers Wales**⁴⁰
- **Federation of Awarding Bodies Wales**⁴¹
- **Federation of Small Businesses Wales**⁴²
- **National Occupational Standards**⁴³
- **Alliance of Sector Skills Councils**⁴⁴

Workforce skills and education are clearly linked in goals and outcomes. A 2014 Progress report from the first minister celebrates 'workforce' accomplishments as follows: 'Success rates in Further Education and Apprenticeships are rising and for the first time more than half of adults in Wales now hold at least an A level or equivalent qualification'.⁴⁵

The Open University in Wales is the leading provider of part-time undergraduate higher education and supported distance learning across Wales, with 8,000 students. More than 200 companies across Wales sponsor over 800 OU in Wales students. The OU in Wales'

³⁴ https://www.alt.ac.uk/news/all_news/findings-alt-survey-learning-technology

³⁵ <http://www.niacecymru.org.uk/>

³⁶ http://eacea.ec.europa.eu/lfp/grundtvig/grundtvig_en.php

³⁷ <http://gov.wales/topics/educationandskills/learningproviders/communitylearning/?lang=en>

³⁸ <http://gov.wales/topics/educationandskills/qualificationsinwales/creditqualificationsframework/?lang=en>

³⁹ <https://www.ntfw.org/>

⁴⁰ <http://www.careerswales.com/en/>

⁴¹ <http://www.awarding.org.uk/fab-groups>

⁴² <http://www.fsb.org.uk/wales>

⁴³ <http://nos.ukces.org.uk/Pages/index.aspx>

⁴⁴

<http://gov.wales/topics/educationandskills/qualificationsinwales/creditqualificationsframework/employers/?lang=en>

⁴⁵ <http://gov.wales/docs/strategies/140603progressen.pdf>

partnership with the Wales Trade Union Congress (TUC), and a number of individual trades unions, has led to over 1,800 trades-union-supported learner registrations.⁴⁶

Adult Education in Scotland

It is difficult to capture a portrait of Adult Education in Scotland as of the present day; recent mergers among colleges into regional entities are just one marker of reform. The sector in Scotland is diverse, and at the time of writing a national Education Scotland survey – ‘Working with Scotland’s Communities’ – was underway to find out more about the diverse range of paid workers and volunteers that provide community learning and development across Scotland. Findings will be used to ‘establish a baseline to inform national community learning and development policy and planning and professional development and training priorities’.⁴⁷

A national **Community Learning and Development** (CLD) team has a remit to support practice and policy development. Much Adult Education occurs through **Community-Based Adult Learning (CBAL)**;⁴⁸ national CBAL developments may be explored through the following sources:

- **Learning Link Scotland**,⁴⁹ a national intermediary organisation for voluntary organisations that deliver adult learning.
- **Lead Scotland**,⁵⁰ a voluntary organisation widening access to learning for disabled young people, adults and carers across Scotland.
- **Workers Educational Association (WEA)**,⁵¹ a national, democratic, voluntary sector provider of community-based and workplace-based adult learning.
- **College Development Network** (CDN),⁵² which supports the college sector to deliver best practice, share innovations and develop colleges and their staff.
- **Scotland’s Learning Partnership**,⁵³ a national partnership of adult learners and providers in Scotland.

The **Requirements for Community Learning and Development Regulations** (2013) place requirements on local authorities to initiate, maintain and facilitate CLD processes from September 2015. An Assurance and Improvement Plan is published by Audit Scotland on an annual basis for each local authority area, reflecting the ‘devolved’ regional focus.

The Scottish Vocational Qualification (SVQ) is a certificate of vocational education in Scotland. SVQs are available to people of all ages. Flux in the college sector is especially prominent, with a shift away from the language of ‘lifelong learning’ – as formally documented on a Scottish government web site,⁵⁴ which notes:

*A shift in study patterns is taking place within the college sector as colleges concentrate on full-time courses aimed at helping people gain employment **and no longer fund short courses lasting less than 10 hours**. Although the overall activity of colleges remains relatively stable, this change has led to a*

⁴⁶ <http://www.open.ac.uk/wales/about-us/facts-and-figures>

⁴⁷

<http://www.educationscotland.gov.uk/communitylearninganddevelopment/professionallearning/workforcesurvey/index.asp>

⁴⁸

<http://www.educationscotland.gov.uk/communitylearninganddevelopment/adultlearning/communitybasedadultlearning/index.asp>

⁴⁹

<http://www.learninglinkscotland.org.uk/>

⁵⁰

<http://www.lead.org.uk/>

⁵¹

<http://weascotland.org.uk>

⁵²

<http://www.collegedevelopmentnetwork.ac.uk/development-networks/cdn-home>

⁵³

<http://scotlandlearning.org.uk/>

⁵⁴

<http://www.gov.scot/Topics/Statistics/Browse/Lifelong-learning>

*decline in part-time study and an increase in full-time study, which is reflected in college figures on an enrolment and headcount basis.*⁵⁵

As in England, virtual and distance learning options are increasingly common. The OU in Scotland is the leading provider of part-time higher education in that nation, with around 15,000 students; an average student age of 30; and a student body among which 70% of learners work during their studies. 31% of students are between ages 25 and 34.⁵⁶

Launched on 5th November, the **Digitally Agile National Principles**⁵⁷ are a national framework of guiding principles for the use of digital technology (and social media) in CLD. They are developed by YouthLink Scotland, Learning Link Scotland and the Scottish Community Development Centre (SCDC).

All of Scotland's 25 funded colleges (save for Newbattle Abbey, 'Scotland's Adult Education Residential College'⁵⁸) offer vocational training as well as higher education programmes. Tuition is free for resident students, and additional living support is available in nearly all cases – increasingly in the form of loans. (Interestingly, recent research questions the benefits of Scotland's free tuition policy for lower income families.)⁵⁹

A.1.1 Copyright in UK

The **Copyright, Designs and Patents Act (1988)**, or CDPA, is an Act of the Parliament of the United Kingdom. It outlines the copyright protecting creations in the categories of literary work, dramatic work, musical work, artistic work, films, sounds recordings, broadcasts, and typographical arrangement of published additions.⁶⁰ The full text of the Act is available online, with amendments through 2014.⁶¹

As noted in the POERUP report, copyright legislation and some aspects of industrial policy are controlled by the UK government. There are, therefore, no national OER policies for the UK as a whole. However, quite often initiatives funded for or targeting England spill over, to a greater or lesser extent, to adjacent home nations – and the other home nations can buy into certain initiatives.⁶²

A comprehensive guide to OER for UK education has recently been released as part of Leicester City Council's recent Open Education Schools Guidance work.⁶³ As detailed in one project output, **OER Guidance for Schools 2: Understanding Open Licensing**:

Copyrighted content without a licence granting permissions for reuse or further distribution is 'closed' content; the work cannot legally be copied or reused in its entirety, unless usage can be defended under one of the UK's limited 'fair dealing exceptions' (see below). Generally, the only permission granted by default is for viewing, reading or listening to the work. These works cannot be shared, modified or reused without permission from the copyright holder. Copyright applies to all original works, including films, songs, images, books, dramas, sound recordings, TV and radio broadcasts, and Internet publications and transmissions...

⁵⁵ <http://www.gov.scot/Topics/Statistics/Browse/Lifelong-learning/TrendFESTudents>

⁵⁶ http://www.open.ac.uk/scotland/sites/www.open.ac.uk.scotland/files/files/ecms/web-content/Scotland_facts_figs_2013-14.pdf

⁵⁷ <http://www.digitallyagileclld.org/>

⁵⁸ <http://www.newbattleabbeycollege.ac.uk/>

⁵⁹ <http://www.theguardian.com/education/2014/apr/29/free-tuition-scotland-benefits-wealthiest-students-most-study>

⁶⁰ https://en.wikipedia.org/wiki/Copyright,_Designs_and_Patents_Act_1988

⁶¹ <http://www.legislation.gov.uk/ukpga/1988/48>

⁶²

http://www.poerup.info/resources/public%20deliverables/POERUP_D4.3_Country_Option_Pack_UKEngland.pdf

⁶³ <http://schools.leicester.gov.uk/ls/open-education/>

Works acquire copyright automatically, without the need to register the work. Copyright is granted to new works when they are recorded in a material form, such as being written down or saved on a computer. It does not matter if you cannot see the © symbol — or if the site hosting the work is non-commercial — copyright rules still apply.

Copyright lasts for the lifetime of the creator, plus usually an additional few decades following their death, depending on the type of work. In the UK, copyright for literary, dramatic, musical or artistic works lasts for 70 years from the death of the last remaining author of the work.⁶⁴

Jisc provides a guide to Copyright Law Essentials as part of its Legal Guidance for ICT Use in Education, Research and External Engagement.⁶⁵ It offers a summary of copyright and its relevance to the work of UK colleges and universities as of the publication date.

A series of minor changes to UK copyright law 'to make it better suited for the digital age' were implemented in 2014, affecting of use content such as books, music, films and photographs. They additionally introduce 'greater freedoms in copyright law to allow third parties to use copyright works for a variety of economically and/or socially valuable purposes without the need to seek permission from copyright owners'.⁶⁶ The 2014 amendments are available online in an informal capacity as a PDF, for comparison purposes.⁶⁷

As noted by the LCC project, from April 2014, the Department of Education provides licences from the following copyright management organisations for all primary and secondary state-funded schools:

- Copyright Licensing Agency, for print and digital copyright content in books, journals and magazines;
- Printed Music Licensing Limited, for printed music;
- Newspaper Licensing Agency, for newspapers and magazines;
- Educational Recording Agency, for recording and use of copies of radio and television programmes;
- Filmbank and Motion Picture Licensing Company, for showing of films.

Further information on copyright as it impacts other sectors is available in the United Kingdom report on the POERUP wiki.⁶⁸

A.1.2 OER in Adult education in UK

Extensive information on Open Educational Resources, MOOCs and open learning in England, Scotland and Wales are provided within the POERUP OER Policy reports (2013-2014);⁶⁹ there has been little noteworthy activity located in Northern Ireland to date. This section draws heavily on those reports. (An inventory of UK-based OER initiatives is also available through the *OER Impact Map*⁷⁰ from the Open University's OER Research Hub.)

⁶⁴ <http://schools.leicester.gov.uk/EasySiteWeb/GatewayLink.aspx?allid=583068>

⁶⁵ <http://www.jisclegal.ac.uk/LegalAreas/Copyright/PR/CopyrightLawEssentials.aspx>

⁶⁶ <https://www.gov.uk/government/news/changes-to-copyright-law>

⁶⁷ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/308729/cdpa1988-unofficial.pdf

⁶⁸ http://poerup.referata.com/wiki/United_Kingdom

⁶⁹ See http://poerup.referata.com/wiki/File:POERUP_D4.3.UKE.pdf (England),

http://poerup.referata.com/wiki/File:POERUP_D4.3.1UKS_Country_Option_Pack_Scotland.pdf (Scotland)

and http://poerup.referata.com/wiki/File:POERUP_D4.3.1UKW.pdf (Wales)

⁷⁰ <http://oermap.org/>

England

Before the 2010 change of political parties at the helm of the UK national government, the UK government allocated funding for a major OER programme (from 2009-2012) primarily for England, through the **Jisc/HEA OER Programme**.⁷¹ Although largely targeting English higher education, OER is by its very nature open for use across all sectors and thus extremely relevant to Adult Education; moreover, as noted above, quite often OER initiatives funded for or targeting England cross to adjacent home nations.

The OER Programme was run jointly by JISC (Joint Information Systems Committee) and HEA (the Higher Education Academy), in three phases:

- **UKOER1**, funded between April 2009 and April 2010, which supported pilot projects and activities around the open release of learning resources. (29 projects in three strands: Institutional, Individual and Subject.)
- **UKOER2**, which ran between August 2010 and August 2011. (36 projects in three areas: the release, use, and discovery of OER.)
- **UKOER3**, which operated between October 2011 and October 2012 to support the continued application of OER and related activity and processes across the HE and FE sector and related areas. (13 projects investigating the use of OER approaches to work towards particular strategic, policy and societal goals.)

All project outputs are available online for review. In addition to the OER Programme, with an investment totalling about £5.4 million, Jisc funded a **Content Programme**⁷² between 2011 and 2013. This programme builds on previous Jisc Digitisation and Content Programmes⁷³ which addressed issues related to the creation and delivery of digital content in parallel with the skills and strategies needed within institutions to support digitisation activity. The Content Programme has funded nine projects focusing on the digitisation and OER. These projects ran until July 2013, and digitised and openly released archival and special collections of primary sources, aiming to embed such resources within teaching and learning as a way of enhancing the student experience and fostering innovative pedagogies. A key output from the Jisc/HEA OER and Jisc Content Programmes was the creation and releasing of a substantial amount of OERs to support a particular subject.

Less formally, **OpenLearn** from the Open University offers free access to learning materials from The Open University, addressing learners with 'general interest'. These very informal courses are available at introductory, intermediate, advanced and masters level, with digital badges available for some courses. (OpenLearn has content which stretches back to 1999, when The Open University created Open2.net, providing free online learning to support broadcast collaborations with the BBC.)⁷⁴

In October 2013 the OU announced the MOOC initiative **FutureLearn** ('free online courses from top universities and cultural institutions').⁷⁵ Technically this is a consortial initiative, not a national one, with funding from the Open University and co-funding from the other partners, but due to the leading position of the Open University and the overt support (moral not financial) from the Minister of State for Universities and Science, it soon took on strong overtones of a national initiative – and has now spread to all home nations of the UK, and to several other countries.

⁷¹ See <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer.aspx>, <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2.aspx> and <http://www.jisc.ac.uk/whatwedo/programmes/ukoer3.aspx>

⁷² http://www.jisc.ac.uk/whatwedo/programmes/digitisation/content2011_2013.aspx

⁷³ <http://www.jisc.ac.uk/whatwedo/programmes/digitisation.aspx>

⁷⁴ <http://www.open.edu/openlearn/about-openlearn/frequently-asked-questions-on-openlearn>

⁷⁵ <https://www.futurelearn.com/>

Although some will argue that MOOCs do not in fact constitute OER, it is relevant that in September 2013 the Department for Business Innovation & Skills (BIS) released *The Maturity of the MOOC*, subtitled 'A Literature Review of Massive Open Online Courses and other forms of Online Distance Learning'. It contained a set of useful interviews and a modest set of references but also much comment on a wide range of popular reports, many impacting thinking surrounded the future of Adult Education. The report cited Donald Clark, former CEO of the e-learning agency Epic, as saying:

*Good MOOCs will allow you to truly go at your own pace, to stop and start, go off on an exploratory path and return again. This is what true adult learning is and should be.*⁷⁶

On most FutureLearn courses, students have the option to purchase a 'Statement of Participation'; some offer the chance to demonstrate knowledge of a subject by taking an invigilated exam at a local test centre.

At the timing of writing there have been no new national OER initiatives in England, although it is expected that there may soon be some new national initiatives in OER (but with much smaller funding than the earlier national HE OER programmes) – perhaps targeting further education and community learning, as recently announced in the United States.⁷⁷

The POERUP report on the United Kingdom contains a great deal of detail on the specific OER developed in England under earlier funded programs.⁷⁸

Since that time (as mentioned previously), one additional major initiative with potential to impact multiple sectors is **Leicester City Council's (LCC) OER Guidance for Schools**⁷⁹ (England). LCC has provided 84 community schools with permission to openly license their educational resources, recommending that school staff use the Creative Commons Attribution (CC BY) license for sharing their work. Their own OER, available to all, presents professional development materials for educators as creators of OER, addressing OER in the context of digital literacy for adults. The project takes understanding copyright and open licensing as a basic requirement for staff working in education/using and creating digital resources, and provides a template for future work in this sphere.

Wales

The POERUP report on Wales has covered OER policy issues in some depth and we draw on that report here.⁸⁰

Hwb⁸¹ is the schools-level repository of open educational material; there is also the Y Porth portal of Welsh-language material.⁸² Cardiff University is a member of FutureLearn, however – the only Welsh member – and the University of South Wales is a member of OERu (the only UK member until the OU joined); the latter also has an active iTunesU site. There is as yet no penetration of the main US and European MOOC initiatives (Coursera, EMMA, OpenUpEd) into Wales.

From early 2013 a specific OER policy agenda began to appear in Wales across the wider educational sector. An OER agenda in Wales impacting Adult Education leapt into prominence with the declaration in September 2013 by all Welsh universities of their

⁷⁶ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/240193/13-1173-maturing-of-the-mooc.pdf

⁷⁷ <http://www.doleta.gov/skillsacademy/>

⁷⁸ http://poerup.referata.com/wiki/United_Kingdom

⁷⁹ <http://schools.leicester.gov.uk/ls/open-education/>

⁸⁰ http://poerup.referata.com/wiki/File:POERUP_D4.3.1UKW.pdf

⁸¹ <https://hwb.wales.gov.uk/Community/Pages/Home.aspx>

⁸² <http://hwb.wales.gov.uk>

commitment to OER;⁸³ there is now a designated OER Wales portal consolidating all work in this area, featuring the OER15 conference, which it will host.⁸⁴ The site was developed as part of the OER Wales Cymru Project to showcase the 'best' OER in Wales and promote Open Educational Practice (OEP) across the Welsh Higher Education Sector.

In March 2014 the new Online Digital Learning Working Group produced a thorough report **Open & online: Wales, higher education and emerging modes of learning**.⁸⁵ The report sets higher education in a broader context of vocational training and widening participation and presents a list of recommendations to the Minister for Education and skills. There is no significant effort devoted to OER in FE per se. Follow-on recommendations are available in the POERUP report.

The Open University is active in Wales and has a designated office in Cardiff. In recent years the OU in Wales has created a network of 125 community and workplace based 'OpenLearn champions' whose role is to promote the effective use of OER.⁸⁶

Scotland

The POERUP report on Scotland⁸⁷ notes that the relevant literature is suggestive of an openness to flexible learning approaches, discussing this in the context of the need to develop a European qualifications framework that standardises a variety of types of formal and informal (undergraduate) learning across national boundaries.

Since the turn of the century, Scotland's education landscape has been characterised by broad moves towards openness. The schools sector has had **GLOW**,⁸⁸ an online community for sharing resources and ideas (though this is a protected site, because of concerns about internet safety for minors; in addition, 12 out of 32 local education authorities do not allow their teachers to upload resources). There were earlier moves towards sharing resources within the FE colleges, though this was available by subscription service only. **JORUM**⁸⁹ – the 'UK's largest repository for discovering and sharing OER' for FE, Skills and HE – provides OER across sectors.

The FE resources are now in the process of being transferred to **Re:Source**,⁹⁰ a new initiative managed by the **College Development Network** to develop OER and OER communities (powered by Jorum). In the higher education sector, the Scottish Funding Council has funded a three-year sector wide project on developing open practices in education (Scotland). **Open Educational Practices Scotland (OEPS)**⁹¹ is led by the Open University in Scotland and involves the other 18 higher education institutions, the college sector and non-university bodies. It aims to act as a test bed and a catalyst for the implementation of effective practice in the development and use of OER in Scotland. OEPS is intended to cover all educational sectors, though the drivers are currently coming from HE; the first project report was released in March 2015, showing involvement by a number of Third Sector organisations as the network is establishing itself.

There has been a move towards the use of Mozilla Open Badges as well, for example at Borders College, as examined in a recent case study – this is a single example, but represents noteworthy inquiry by the SQA.⁹²

⁸³ <http://www.uniswales.ac.uk/welsh-universities-sign-declaration-of-intent-embedding-open-education-at-the-heart-of-their-strategies/>

⁸⁴ See <http://www.oerwales.ac.uk/> and <http://oer15.oerconf.org/>

⁸⁵ <http://wales.gov.uk/docs/dcells/publications/140402-online-digital-learning-working-group-en.pdf>

⁸⁶ <http://www.open.ac.uk/wales/openlearnchampions>

⁸⁷ http://poerup.referata.com/w/images/POERUP_D4.3.1UKS_Country_Option_Pack_Scotland.pdf

⁸⁸ <http://www.educationscotland.gov.uk/learningandteaching/approaches/ictineducation/glow/whatis/>

⁸⁹ <http://www.jorum.ac.uk/>

⁹⁰ <http://resource.blogs.scotcol.ac.uk/>

⁹¹ www.oepsotland.org

⁹² <http://www.rsc-scotland.org/?p=2454>

In June 2013 a Scottish OER policy agenda began to appear, both in higher education and in the wider educational sector. A number of national curriculum and technology groups – **CETIS**, **SQA**, **Jisc**, **RSC Scotland** and **ALT**⁹³ – came together voluntarily to produce an *Open Scotland Declaration*⁹⁴ (a deliverable from the Open Scotland Summit). This declaration builds on the *UNESCO 2012 Paris OER Declaration*⁹⁵ but the scope has been widened to focus on open education more generally, rather than OER specifically. The Declaration remains aspirational; it has attracted approving comment from the Scottish government, but as yet no concrete actions.

There continue to be significant moves towards open education in all sectors in Scotland, several of them resourced directly, or indirectly, by the Scottish government. OER is ‘**promoted and supported**’ by the **College Development Network Board and Principals’** Executive Group and Scottish Government, as mentioned in the CDN Operational Plan for 2014-15.⁹⁶ As yet, however, there are no formal national policies on open education or that mention OER. The POERUP report makes a number of recommendations based on the Declaration.⁹⁷

A.1.3 Quality for OER in UK

Despite ongoing concerns about issues of quality in both OER and online course materials in general, no national rubrics have yet emerged against which to measure the quality of OER. However the OER infoKit released under the **UKOER Programme** (2009-2012) includes a modicum of guidance for those pursuing the use of OER. (Regrettably, a number of these documents have evidently been removed from the project wiki.)

- Quality considerations: A broad narrative document review quality concerns.⁹⁸
- Pedagogical aspects – practical resources and guides: Links to resources addressing matters of quality as well as trust, curriculum needs and development.⁹⁹
- Technical aspects – practical resources and guides: Links to resources addressing technical concerns, e.g. hosting, metadata and discoverability.¹⁰⁰
- Pilot programme outputs – Quality issues: Five projects addressing quality issues.¹⁰¹
- CORRE: Quality Matters in OERs: A simple framework for transforming teaching materials into OERs (OTTER Project).¹⁰²

Recent UK research into OER Quality has been undertaken by individual researchers, but results do not indicate a systematic or comprehensive approach to the issue.¹⁰³

In the schools sector there is, more recently, a public template for production of high-quality OER (through the efforts of the LCC, 2014). Matters of quality are discussed in two of the four guidance documents released, and the issue of accessibility addressed clearly in one. Schools are urged schools not to introduce onerous systems in their

⁹³ See <http://www.cetis.ac.uk/>, <http://www.sqa.org.uk/sqa/70972.html>, <http://www.jiscsc.ac.uk/scotland>, and <https://www.alt.ac.uk/get-involved/special-interest-groups/scotland>

⁹⁴ <http://declaration.openscot.net/>

⁹⁵ http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/Events/Paris%20OER%20Declaration_01.pdf

⁹⁶ <http://www.collegedevelopmentnetwork.ac.uk/download-document/5682-cdn-strategy-operational-plan-2014-15>

⁹⁷ http://poerup.referata.com/w/images/POERUP_D4.3.1UKS_Country_Option_Pack_Scotland.pdf

⁹⁸ <https://openeducationalresources.pbworks.com/w/page/24838164/Quality%20considerations>

⁹⁹ <https://openeducationalresources.pbworks.com/w/page/62667648/UKOERGuides%20PedagogicalAspects>

¹⁰⁰ <https://openeducationalresources.pbworks.com/w/page/62666418/UKOERGuides%20TechnicalAspects>

¹⁰¹ <https://openeducationalresources.pbworks.com/w/page/27129220/Pilot%20programme%20outputs%20-%20Quality%20issues>

¹⁰² http://www2.le.ac.uk/departments/beyond-distance-research-alliance/projects/otter/about-oers/Corre-web.pdf/at_download/file

¹⁰³ See <http://www.researchinlearningtechnology.net/index.php/rlt/article/view/20889#sidebarRTAuthorBios> and <http://eprints.soas.ac.uk/17347/1/30-288-1-PB.pdf>

quality assurance processes, which may inhibit sharing. The LCC instead provides a short checklist, and suggests that schools build on their existing quality control processes and practices. (There are six supporting documents, with activities and tutorials to help staff locate, use and create OER).¹⁰⁴

A.2 France, by Giles Pepler

Acknowledgements also to Anne Boyer for specific advice.

France has a population of 66 million. The French education system is characterised by strong State presence in the organisation and funding of Education. The State defines **the details of curricula at all education levels; it organises the teachers' admissions** procedure, defines content, recruits teachers who become civil servants, provides them with in-service training; it recruits and trains inspectors, responsible for controlling the quality of the education system; it is the main funding body of the public education **system and subsidises 'private schools under contract'**¹⁰⁵ which receive approximately 20% of school pupils.

Education is compulsory between the ages of 6 and 16. However, France has a long tradition of pre-primary education: for the past twenty years, almost all children have attended nursery school from the age of three, even though it is optional; it is therefore an integral part of the French education system. French pupils tend to specialise quite late on: since a 1975 Act, they are taught the same subjects until the age of 15 within a **'collège unique'** (ISCED 2). **The end of the lower secondary education is sanctioned by the *Diplôme National du Brevet***,¹⁰⁶ however, admission to upper secondary level is not conditional upon success in the brevet.

The first stage of specialisation occurs at the end of college (lower secondary education): pupils are streamed to attend either a general and technological lycée or a professional lycée. Both types of school prepare pupils to take the ***baccalauréat***¹⁰⁷ in three years, marking the end of secondary education: pupils who pass it obtain the State-issued ***baccalauréat*** diploma (general, technological or vocational) which opens up access to higher education and entitles them to enrol at university.

Higher education is characterised by the coexistence of two systems: universities, – public institutions that have an open admissions policy, except for ***IUT*** (technological university institutes) or some integrated preparatory classes – and a non-university sector, including, in particular, ***Grandes Ecoles***¹⁰⁸ (Elite Schools), with a highly selective admissions policy open to baccalauréat holders having attended two years of integrated preparatory classes, themselves highly selective on entry and during the course. Higher education institutions have a wide variety of legal statuses that are listed in the French Code of Education (book VII). Courses dispensed at these institutions have different aims and conditions for admission, but most of them are structured into three study cycles (**Bachelor's degree, Master's degree and Doctorate**) and in ECTS credits,¹⁰⁹ in compliance with the principles of the Bologna process.¹¹⁰

¹⁰⁴ <http://oerresearchhub.org/2014/11/10/making-oer-mainstream-in-schools/>

¹⁰⁵ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Organisation_of_Private_Education#Under_contract_private_education

¹⁰⁶ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Assessment_in_General_Lower_Secondary_Education#The_national_brevet_diploma_28DNB.29

¹⁰⁷ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Glossary#Baccalaur_C3.A9at_-_Baccalaureate

¹⁰⁸ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Glossary#Grande_Ecole.28s.29_-_Elite_school.28s.29

¹⁰⁹ http://ec.europa.eu/education/tools/ects_en.htm

¹¹⁰ <http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1426873132137&uri=CELEX:52012IP0072>

A.2.1 Adult education in France

The Eurypedia report on the French education system states that only 5.7% of adults participated in CVT (continuing vocational training) in 2012, well under the EU average of 9%.¹¹¹

Continuing education¹¹² is the type of training geared toward those who have left basic education. It is aimed at salaried workers, the unemployed, and all adults wanting training or a diploma. The most well-known field is continuing professional development.

Funds for continuing education in France come from companies (40%), from the state (22%), (Pôle Emploi among other agencies), from the regions (14.4%), from the government for its own agents (19%), and from households (4%). Continuing education can be provided by companies (when they have in-house training departments), by government agencies (GRETA, AFPA, Universities, CNAM, etc.), or by private institutions. In 2012, there were 48,000 training institutions, public and private, in France.¹¹³ Universities only take about 8% of the adult education market.¹¹⁴

For adults wanting to go back to school or get a degree, three routes are available:

- The diploma giving access to higher education (*Diplôme d'Accès aux Etudes Universitaires*, DAEU): success in an exam enables them to register in a university. There are two DAEUs: DAEU-A: literature, law; DAEU-B: sciences.¹¹⁵ It grants the same rights as the baccalauréat when it comes to access to higher education and is delivered by authorized universities.
- The *capacité en droit* is also a university diploma which is open to those 17 and above, with no prior qualifications required. This gives access to higher education in the field of law.¹¹⁶
- The accreditation of acquired experience (*Validation des Acquis de l'Expérience*, VAE) takes into account skills acquired outside the academic system, university or otherwise. The aim is to achieve the appropriate higher education level to go back to studying, or to get part or the whole of a higher education degree¹¹⁷ – it is up to the individual university what it will recognise.

For vocational education distance education is available for upskilling. The e-learning system allows for a certain amount of freedom and a high degree of autonomy, which can attract those who want to be responsible for their own training. Open and distance training courses can be offered as part of continuing professional development. The cost of training can be partly covered for those in employment, or seeking employment. Depending on their age and situation it may be covered by the employer, the regional or **general councils, the Employment Agency (Pôle Emploi), or an authorised 'collecting organisation' (Organisme Paritaire Collecteur Agréé, or OPCA) which finances continuing professional development for salaried workers.** Training can be undertaken in a number of different ways: through paid training leave; the individual right to training (Droit Individuel à la Formation et Formation Professionnelle Continue, or DIF), or a period of vocational training undertaken through an organisation such as **CESI**.¹¹⁸ In 2012 more than a million adults were taking distance learning courses.

¹¹¹ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Adult_Education_and_Training

¹¹² The text of this section is adapted from the POERUP country report for France: <http://poerup.referata.com/wiki/France>

¹¹³ For further information see <http://www.education.gouv.fr/cid217/la-formation-tout-au-long-de-la-vie.html>

¹¹⁴ Anne Boyer (Université de Lorraine) – pers. Comm.

¹¹⁵ For further information see <http://www.enseignementsup-recherche.gouv.fr/cid21053/le-d.a.e.u.html>

¹¹⁶ For further information see http://fr.wikipedia.org/wiki/Capacit%C3%A9_en_droit

¹¹⁷ For further information see <http://www.vae.gouv.fr/>

¹¹⁸ <http://www.cesi.fr/>

There are many public and private organisations offering online vocational courses which meet the requirements of the French education system. Some of the major agencies are:

Public agencies

- **Le Centre National d'Enseignement à Distance (CNED)**¹¹⁹ – *the national centre for distance learning*. Under the authority of the Ministry for National Education and the Ministry for Higher Education and Research, the CNED offers courses for everyone, whether as basic training, continuing education, or, in the broader sense of the word, life-long continuing education. Classes offered by the CNED to students aged under 16 are free. After approval by an academic inspection they can also be funded by the state after the age of 16. In 2012, 202,000 learners were registered – around 20% of the total number of distance learners, of which two thirds were adults and 50% of them were in higher education. Courses in accounting and finance are the ones with the most students: 29,000 registered people.
- **Eduter-CNPR**¹²⁰ – *the national centre for training for land-based industries and conservation*. Eduter-CNPR is the open long-distance education institution of the Eduter Institute, a department of the higher education institution AgroSup Dijon¹²¹ (agro-business engineering school). This is a public institution under the authority of the Ministry for agriculture, and offers open and distance training, for a degree or a diploma, for the rural world: vocational Baccalauréat, technological Baccalauréat, higher vocational diploma for agriculture, training for competitive examination, customized remedial training, pre-training, and customized advanced training.
- **Le Conservatoire National des Arts et Métiers (CNAM)**¹²² – under the authority of the French Ministry for Higher Education, this is a public institution dedicated to life-long education. The institution supervises a network of 28 regional centres, 150 teaching centres, and offers 7,700 distance learning courses. The offer is varied: vocational degrees, **bachelor's, master's, as well as numerous diplomas registered in the RNCP (National Register of Vocational Accreditations)**.¹²³
- **Universities**: each French university has a distance education service and a distance learning department. The content and organisation of studies can vary from one university to the next (number of student meetings, pedagogic support, type of course mailing, costs, exam assessment, etc). The degrees delivered are national degrees which have been authorized by the Ministry of education and are linked to ECTS.

Private agencies

- **Les Cours Legendre**,¹²⁴ **Les Cours Hattemer**,¹²⁵ **L'école par correspondance**¹²⁶ and **Les Cours Académiques de France**¹²⁷ are limited to primary and secondary education.

¹¹⁹ <http://www.cned.fr/>

¹²⁰ http://eduter-cnpr.fr/no_cache.html#&panel1-2

¹²¹ <http://www.agrosupdijon.fr/?L=1>

¹²² <http://www.cnam.fr/>

¹²³ For further information see <http://www.cnam.fr> <http://eve.cnam.fr/comment/-/les-ue-par-internet/la-formation-ouverte-et-a-distance-foad--264469.kjsp?RH=foad> <http://the.cnam.eu/lifelong-learning-for-everyone-welcome-to-the-cnam-home-page-103491.kjsp> <http://the.cnam.eu/education-and-training/>

¹²⁴ www.cours-legendre.fr/

¹²⁵ www.hattemer-academy.com/

¹²⁶ <http://www.epceducation.com/>

¹²⁷ <http://www.coursacademiques.fr/>

- **L'École chez soi**,¹²⁸ **L'École Universelle**,¹²⁹ **La Revue d'Études**,¹³⁰ **Educatel**¹³¹ and **Demos**¹³² all offer a range of specialised distance learning professional courses for adults and so do many large French companies, but in the case of the companies, their training is geared towards their own core business.

Portals for long-distance learning

- **TeleSup**¹³³ was created by the **FIED**¹³⁴ (Inter-university federation of long-distance learning) to provide clearer signposting to on-line university courses. The TeleSup portal centralizes the courses of the 36 member universities, making it easier to access the more than 300 long-distance university courses. All fields are covered, as well as the preparation for such competitive exams as the **CAPES**¹³⁵ and **Agrégation**.¹³⁶
- **Formasup**¹³⁷ has the same aim. The portal provides a centralized searching tool and gives the Internet user the links and contacts needed. It covers over 3,000 courses offered by public institutions in all school districts (académies): universities, schools or institutes, CNED (the national centre for long-distance education), CNAM (the national conservatory of arts and trade), as well as AgroSup-CNPR (national centre for rural promotion). The web site gives a description of the long-distance courses of the partner institutions, and all the necessary information.
- **La Chambre Syndicale Nationale de l'Enseignement privé à Distance**¹³⁸ was created in 1980 by merging together the French trade association for private distance education (Chambre Syndicale Française de l'Enseignement Privé par Correspondance, CHAFREC), the national association for private distance education (Syndicat National de l'Enseignement Privé par Correspondance, SNEC), and the national association for distance and continuous education (Syndicat National de l'Enseignement à Distance et de la Formation Continue, SNED), the CHANED (national association for private distance education, Chambre syndicale Nationale de l'Enseignement privé à Distance) aims at promoting private distance education, and acts as its representative.
- **UT en ligne**¹³⁹ is the digital campus managed by the AssoDIUT association, the association of Vocational University Institutes (Association des Directeurs d'Institut Universitaire Technologique), which groups 115 IUTs, 625 departments and 26 domains. The purpose is to provide the IUT teaching and student community with a media library including the main elements of the educational resources needed for the training provided in IUTs, education engineering services, and an exchange space. The site offers reusable 'raw' resources for face-to-face teaching sessions and 'self-teaching units' for face-to-face or long-distance teaching.

¹²⁸ <http://www.ecolechezsoi.com/>

¹²⁹ <http://www.ecole-universelle.fr/>

¹³⁰ <http://www.revue-d-etudes.fr>

¹³¹ <http://www.educatel.fr/> and <http://www.educatel.fr/toutes-les-formations>

¹³² <http://www.demos.fr/fr/e-learning/Pages/default.aspx>

¹³³ <http://www.telesup.univ-mrs.fr>

¹³⁴ <http://urlmetriques.co/www.fied-univ.fr>

¹³⁵ See

http://fr.wikipedia.org/wiki/Certificat_d%27aptitude_au_professorat_de_l%27enseignement_du_second_de_gr%C3%A9

¹³⁶ See <http://en.wikipedia.org/wiki/Agr%C3%A9gation>

¹³⁷ <http://www.formasup.fr>

¹³⁸ <http://www.chaned.fr/>

¹³⁹ See <http://www.iutenligne.net/ressources.php>

- **FUN**¹⁴⁰ – **France Université Numérique** – is a government initiative linking university online courses and promoting lifelong learning. Included amongst its aims and objectives is one to promote adult learning:

Proposer une offre innovante de formations en ligne pour répondre aux besoins croissants de formation continue.

La loi du 22 juillet 2013 a inscrit pour la première fois la formation tout au long de la vie dans les missions de l'université. Le numérique doit permettre aux établissements d'enseignement supérieur de se positionner sur un marché en expansion et de répondre aux attentes des salariés, demandeurs d'emploi et, plus généralement, de tout citoyen désireux de se former. C'est un gisement faiblement exploité car les universités ne réalisent que 4% des 8 milliards de la formation continue dans l'ES alors qu'elles possèdent les compétences et les expertises pour renforcer leur présence dans ce secteur.

Un exemple: le CNAM (Conservatoire National des Arts et Métiers) a décidé de consacrer des moyens importants à la production de MOOCs pour le public francophone. Dès octobre, le CNAM proposera des MOOCs à destination principale des salariés (cadres, ingénieurs et techniciens). Parmi les sujets de ces MOOCs: 'Développer les talents et le leadership de vos collaborateurs' ou 'Eléments de santé au travail pour les ingénieurs et les managers.'

- **GALLICA**¹⁴¹ is a national repository of cultural items – books, manuscripts, periodicals, music scores etc. – many of which are available under open licensing.

A.2.2 Copyright in France

In France, copyright is ruled by the Intellectual Property Code (Code de la Propriété Intellectuelle), a document under French law made of articles, which are regularly updated by parliament. According to Article L. 111-1, **copyright protects 'works of the mind', that is: literary, musical, graphic and plastic works, but also software, applied arts creations, fashion, and so on.** Songwriters, videogram and phonogram producers, as well as broadcasting companies, have rights similar to copyright. Copyright is gained through no special formality, just by the mere existence of the work.¹⁴² France subscribes to the Berne Convention.

Education employees are civil servants, but this does not change the rule set by Article L.111-1, section 3 of the Intellectual property code. The civil servant has rights over his work. The law states, however, that the patrimonial rights are to be handed to the state when the work was created by an agent in the course of his work or following instructions given. In compensation, the author must share the profits made from the use of his work according to the terms mentioned in a decree from the Council of State.

Re.Lire¹⁴³ is a useful site, linked to FUN, which categorises authors' rights.

The French Ministry of Culture is promoting the use of CC licensing and the Minister produced an excellent video in 2014¹⁴⁴ encouraging this. At the same time, the Ministry announced that it was sharing its two flagship websites¹⁴⁵ under CC-BY¹⁴⁶ licenses.

¹⁴⁰ <http://www.france-universite-numerique.fr/>

¹⁴¹ <http://gallica.bnf.fr/?lang=EN>

¹⁴² For further information, see:

http://www.legifrance.gouv.fr/affichCode.do?sessionId=F2D859C0660BE27DDA293CD7EE218658.tpdjo17v_1?idSectionTA=LEGISCTA000006161633&cidTexte=LEGITEXT000006069414&dateTexte=20121127

¹⁴³ <https://relire.bnf.fr/accueil>

¹⁴⁴ <http://creativecommons.org/tag/cc-france>

¹⁴⁵ <http://www.culturecommunication.gouv.fr/Presse/Communiqués-de-presse/Le-ministère-de-la-Culture-et-de-la-Communication-s-engage-en-faveur-des-licences-ouvertes> and <http://www.culture.fr/>

Before this, there had been a number of pilot initiatives, notably with **SACEM**¹⁴⁷ in 2012. Some of the resources of FUN are CC-licensed.

A.2.3 OER in adult education in France

Although ISCED Level 4 is virtually ignored in the French educational structure,¹⁴⁸ yet there is a wide (and complex) picture of adult education training courses in France. However, amongst the broad range of organisations described in section 2 above, there is not very much evidence that significant resources are open and most of the courses are fee paying for all or most learners.

There have been a number of regional OER initiatives which can provide resources for adult education, though these can be difficult to identify because of a lack of clarity at the regional and national levels – OER regional initiatives are implemented by several categories of agents: associations, teachers, institutions, private organizations, local and territorial authorities. Although not specifically focused on adult education, the regional initiatives include **LUNO** (Lorraine Université Ouverte),¹⁴⁹ **VITRA**¹⁵⁰ (Lorraine), **EUCeramics** (Burgundy),¹⁵¹ **MoocITyPA** in Brittany,¹⁵² the **SILLAGES** initiative¹⁵³ (national), **Collège de France** in the Ile-de-France Region¹⁵⁴ and **Xyoos** (Rhône-Alpes).¹⁵⁵ Note also that the open educational resources implemented by the regions and to which the user has access on specific sites are often implemented at the national level as well in institutional mechanisms that pool open educational resources.

Thematic digital universities (*Universités Numériques Thématiques, UNT*) were created in 2003 by the education ICTE division (Sous-Direction des Technologies de l'Information et de la Communication pour l'Éducation, SDTICE) of the French ministry of higher education. The aim is to put at the disposal of institutions and students educational resources that have been approved by competent academics in each field.

*Thematic digital universities*¹⁵⁶ are not classic university institutions registering students and giving degrees. They have varied legal status (GIP, partnership foundation, GIS, private association, inter-university common department), and they are groupings of higher education institutions pooling training resources for students, adults and professionals, with the support of the state. In 2012 there were 7 thematic digital universities. Some are free of charge and open, others are free of charge but for the use of member institutions (basic training), or for a fee and sold by the member institutions (resources that are included in their continuous education programmes).¹⁵⁷ The **FUN** initiative, first established in 2013 and still rapidly developing, brings together access to the digital universities and their resources, many of which are OER. There are also a number of catalogues of free digital resources – e.g. **Signets**.¹⁵⁸

France has been active in developing MOOCs: the Open Education Europa scoreboard shows a maximum of 144 operating in early 2014, though the latest update (February 2015) shows 7 currently in operation,¹⁵⁹ though we suspect this is an underestimate, as

¹⁴⁶ <http://www.culturecommunication.gouv.fr/Presse/Communiqués-de-presse/Le-ministère-de-la-Culture-et-de-la-Communication-s-engage-en-faveur-des-licences-ouvertes>

¹⁴⁷ <http://www.sacem.fr/cms/home?pop=1>

¹⁴⁸ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/France:Adult_Education_and_Training

¹⁴⁹ <http://www.virtualschoolsandcolleges.eu/index.php/Luno>

¹⁵⁰ <http://www.e-vitra.eu>

¹⁵¹ <http://www.eu-ceramics.eu/>

¹⁵² <http://itypa.mooc.fr/>

¹⁵³ <http://plateforme.sillages.info/>

¹⁵⁴ <http://www.college-de-france.fr/site/audio-video/index.htm>

¹⁵⁵ <http://www.cours-informatique-gratuit.fr/formation-informatique>

¹⁵⁶ http://fr.wikipedia.org/wiki/Campus_num%C3%A9riques

¹⁵⁷ See: <http://www.universites-numeriques.fr/>

¹⁵⁸ <http://www.signets-universites.fr/fr/les-signets/>

¹⁵⁹ http://openeducationeuropa.eu/en/open_education_scoreboard

FUN indicates that at least three are available every week, with a total of 37 planned for January-March 2015.¹⁶⁰

A.2.4 Quality for OER in France

There are no national quality procedures for OER in France – this is up to the individual provider. However, to reinforce the quality of distance education, **CHANED**¹⁶¹ has set up a quality charter, which 23 private institutions have signed¹⁶² and the quality charter includes resources, some of which are OER.

A.3 Spain, by Giles Pepler

Spain is one of the larger Member States with a population of 47 million. Responsibility for education is largely devolved to the 19 'autonomies', the 17 autonomous communities and two autonomous cities.

The education system in Spain is organised into mainstream education and Enseñanzas de Régimen Especial (specialised education). Primary education (6 to 12) and compulsory secondary education (12 to 16) correspond to basic education, which consists of ten years of free and compulsory schooling for all pupils. Mainstream education comprises:

- Pre-primary education (Educación Infantil): it is the first stage in the education system and it is non-compulsory. It is divided into two stages: the first one, up to the age of 3, and the second, from 3 to 6 years of age.
- Primary education (Educación Primaria): it is the first compulsory stage of the system. It covers six years of instruction, divided into three two-year cycles. It is normally completed between the ages of 6 and 12.
- Secondary education is comprised of compulsory secondary and post-compulsory secondary. The former – Educación Secundaria Obligatoria (ESO) – is divided into four courses and is ordinarily completed from the ages of 12 to 16. Successful students are awarded a Secondary Education Certificate, which is necessary for entering further optional education, either Bachillerato for their University or Formación Profesional (Vocational Studies).
- Secondary education also includes artistic professional Music and Dance education, intermediate professional Sports and Plastic Arts and Design education, which belong to 'enseñanzas de régimen especial'. This also covers language education. This provision, although not regarded as part of secondary education, belongs to enseñanzas de régimen especial, which may be started at the age of 16 or 14 if the language to be studied is different from the one studied during ESO. Enseñanzas de régimen especial are non-compulsory and structured into different levels and degrees leading to different qualifications and certificates.
- Post-compulsory secondary education includes two options: the two-year Bachillerato (from 16 to 18), and intermediate vocational training (Ciclos formativos), the duration of which varies between one and a half or two years.
- Vocational training is also possible after ESO or after the Bachillerato. There are two different types of programmes: Middle Grade Training Cycles (Ciclos Formativos de Grado Medio), which have the ESO diploma as a requirement, and Superior-level Training Cycles (Ciclos Formativos de grado Superior), which have the Bachillerato as the principal entrance requirement. After

¹⁶⁰ <http://www.france-universite-numerique.fr/37-nouveaux-moocs-proposees-sur-la-plateforme-fun-mooc.html>

¹⁶¹ <http://www.chaned.fr/>

¹⁶² http://www.chaned.fr/ecoles_liste.html

completion of the Superior-level Training Cycle, students are entitled to direct entrance to a range of related University degrees.

- University education: Once students have finished their Bachillerato, they can take their University Entrance Exam (Pruebas de Acceso a la Universidad), popularly called Selectividad which differs greatly from region to region. University in Spain is organised into three cycles, namely Bachelor, Masters and Doctorate, with variable duration and a minimum required number of ECTS credits.
- Although there is a national Ministry of Education, much of the organisation and management of pre-university education is devolved to the 17 regions (Comunidades Autónomas).

The Spanish language is the official language in every autonomous community but six, which also have other official languages:

1. Catalonia (Catalan and Occitan)
2. Valencian Community (Catalan, also called Valencian there)
3. Balearic Islands (Catalan)
4. Galicia (Galician)
5. Basque Country (Basque).

The 2013 **Act on the Improvement of the Quality of Education**¹⁶³ introduces significant changes in the educational provision of Bachillerato and, especially, vocational training. The reforms of vocational training provision include:

- The creation of the new cycles of basic vocational training: these new cycles, which can be taken by students aged 15-17 will start to be implemented in the 2014/15 academic year.
- The development by the education authorities of dual vocational training in the education system.

A.3.1 Adult education in Spain

Adult education and training covers different types of provision offered by the education and employment authorities, provided by a variety of institutions. Classroom-based education leading to the award of official degrees of the education system is provided in ordinary schools or specific schools for adults. Adult education and training is aimed at people aged over 18, though there are exceptions for workers aged over 16 who cannot attend a normal school for whatever reason, or high performance athletes.

Adult education is divided into two strands: second chance education and basic skills and is organised regionally by the Comunidades Autónomas. The largest numbers of second chance learners are aged 45-50, whilst the peak for basic skills learners is in the age range 20-25. Numbers have been affected by the continuing recession; an exception is in the Comunidad de Aragón, which has continued to promote adult learning strongly.

Most professional adult retraining is conducted through universities. Training courses normally lead to the award of *Título Propio*.¹⁶⁴ Such awards are not regulated and do not carry official recognition outside the awarding institution. Other vocational retraining is often conducted by private training organisations; there is state funding for some of this and Trade Unions often provide support.

¹⁶³ http://www.spanishreforms.com/document-legislation/-/asset_publisher/I3dIXOACv5oU/content/organic-law-on-the-improvement-of-the-quality-of-education-lomce-;jsessionid=FAE55E2B130E2928BD06BB38904F5C32?_101_INSTANCE_I3dIXOACv5oU_commitment=1.+GRQWTH+AND+COMPETITIVENESS

¹⁶⁴ See http://es.wikipedia.org/wiki/T%C3%ADtulo_propio

In addition, there are a number of repositories, providing resources related to schooling: training for teachers and school professionals and resources for pupils and their parents. Further details are given in section 4 below; these are organised at a national level.

Spain is no different from many other EU countries in being slow to recognise and accredit informal and prior learning and the seven barriers described on the EPALE website¹⁶⁵ remain largely problematic.

A.3.2 Copyright in Spain

Copyright law in Spain is summarised in the **Royal Legislative Decree of April 12, 1996**.¹⁶⁶ It is similar to the law in many other EU countries, with provisions for IPR and authors' moral rights. Any work which can be seen or heard may be reproduced, distributed and publicly communicated for the purpose of, and only to the extent necessary for, providing information thereof in the context of reporting on current events.

In education, museums, libraries and similar public or cultural institutions may make reproductions of works for the purposes of research (article 37). 'Fragments' of written, sound or audiovisual works or 'isolated' plastic, photographic, figurative or analogous works may be included in another original work for the purposes of teaching or research (finances docentes o de investigación) if the following conditions are met (article 32): the source work has been published; it is included for citation or for analysis, commentary or critical judgment; it is included with a citation of the source and the name of the author; it is only included to the extent justified by the purposes of teaching or research. There is no specific mention of CC or open licensing; a project was established in 2009 to clarify the copyright laws for digital learning environments,¹⁶⁷ which provides resources and guidance regarding the rights that affect the activities practised in virtual education. It also specifies which current copyright laws can form barriers to eLearning aims and present possible solutions to some of these problems.

A.3.3 OER in adult education in Spain

The two main distance learning and open universities – **UNED**¹⁶⁸ and **UOC**¹⁶⁹ – offer a wide range of courses for adults with many of these as 'open' courses requiring no prior qualifications.¹⁷⁰ These OCW courses use OER and UNED currently has a dedicated staff post for OER development, but this has not led to as much progress as might have been expected.

There are several OER initiatives providing resources for adults. **CeDeC** (Centro Nacional de Desarrollo Curricular en Sistemas no Proprietarios) is a portal promoted by the Ministry of Education,¹⁷¹ largely targeted at schools, to facilitate access to the education community to different resources and learning materials freely available, and thus promote the implementation of ICT, but available for general adult use. The portal of the National Institute of Educational Technology and Teacher Training (**INTEF**)¹⁷² also provides open educational resources on its website in various categories and for different audiences: teachers, school pupils, young people and parents. It also hosts the EDA

¹⁶⁵ <http://ec.europa.eu/epale/en/blog/7-challenges-validating-non-formal-and-informal-learning-europe>

¹⁶⁶ https://www.boe.es/diario_boe/txt.php?id=BOE-A-1996-8930

¹⁶⁷ <http://www.ugr.es/~derechosdeautor/index.html>

¹⁶⁸ http://portal.uned.es/portal/page?_pageid=93,25451830&_dad=portal&_schema=PORTAL

¹⁶⁹ <http://www.uoc.edu/portal/ca/index.html>

¹⁷⁰ See the OCW courses at UNED at <http://ocw.innova.uned.es/ocwuniversia>

¹⁷¹ See <http://oermap.org/policy/cedec/>

¹⁷² <http://educalab.es/intef/introduccion>

project for adult education, based in Extremadura,¹⁷³ which includes a range of OER in its course resources.

There is a wide range of initiatives aimed primarily at education professionals and providing OER. The Ministry of Education for schools has launched the **Post Platform**, a repository of educational materials and digital resources Open (OER) for schools in Spain, in collaboration with **Red.es**,¹⁷⁴ **EducaRecursos**¹⁷⁵ and the Ministries of Education of the Autonomous Communities to provide free access for teachers and students of pre-university studies: educational content is organised according to the different stages of education. At the regional level, the Autonomous Communities have also joined such initiatives, by providing the educational community with platforms and free resources to improve teaching and facilitate the introduction of ICT in schools. In Catalonia, the Education Department of the Government has developed **Merlí**¹⁷⁶ which has two reference portals, the first one as a showcase of technological innovation and the use of ICT in the classroom and the second as a catalogue of educational materials for teachers and students. There are similar initiatives in Andalusia,¹⁷⁷ Madrid,¹⁷⁸ Aragón¹⁷⁹ (which has its own Moodle site), Asturias¹⁸⁰ and almost all the other autonomous communities, both in mainland Spain and the island groups.

Agrega¹⁸¹ started out as a national repository for resources (including many OER) for schools and the school curriculum, but there are currently plans to extend this to other educational sectors, including vocational training and upskilling.

Beyond these initiatives there is not a great deal of visibility of OER for adult education courses and this is at least partly due to the reluctance of teachers and trainers to embrace the opportunities they can offer.¹⁸² There are a number of MOOCs currently running in Spain; the Open Education Europa scoreboard lists seven – three in Business subjects, two in the STEM area and one each in humanities and social sciences¹⁸³ – though POERUP recorded that 31 universities have offered them and at least 30 universities offer courses using OCW (Open Courseware).¹⁸⁴

A.3.4 Quality for OER in Spain

Many adult education courses do not lead to regulated and recognised qualifications and there is no central system for quality assurance of OER. Quality procedures (in so far as they exist) are managed by providers and institutions. There are no national procedures or systems for quality assurance of OER.

A.4 Hungary, by Eva Szalma

Hungary is a medium-sized EU Member State with a population of just under 10 million. The national language is Hungarian, which is also spoken in communities of Hungarian people in neighbouring countries – especially in Romania, Slovakia, Serbia and Ukraine.

¹⁷³ <http://eda.educarex.es/portaleda/oferta.html>

¹⁷⁴ <http://www.red.es/redes/quienes-somos>

¹⁷⁵ <http://imedayo.blogspot.co.uk/>

¹⁷⁶ <http://www.xtec.cat/web/recursos/recursos>

¹⁷⁷ <http://www.juntadeandalucia.es/educacion/portaerverroes>

¹⁷⁸ <http://www.educa2.madrid.org/educamadrid/>

¹⁷⁹ <http://www.catedu.es/webcatedu/>

¹⁸⁰ <http://www.educastur.es/>

¹⁸¹

<http://agrega.educacion.es/visualizadorcontenidos2/Portada/Portada.do?jsessionId=D6FB106EE37C477F2BF5C5EBOABBD0C92>

¹⁸² See <http://research.unir.net/2015/03/12/hay-que-cambiar-la-mentalidad-de-los-profesores-para-que-usen-los-recursos-educativos-abiertos/>

¹⁸³ http://openeducationeuropa.eu/en/open_education_scoreboard

¹⁸⁴ <http://poerup.referata.com/wiki/Spain>

In Hungary, schools and kindergartens are established and maintained by the state, local governments, minority local governments, legal entities (foundations, churches, etc.) as well as individuals. About 90 per cent of children attend public sector institutions.

The tasks related to administrative control and management responsibilities are shared among the central (national) government, the local (county and district level) authorities and the educational institutions. Overall responsibility lies with the Ministry of Human Resources, which is in charge of education, culture, social affairs, health care, youth and sport. However, school-based VET and adult training is within the competence of the **Ministry for National Economy**.¹⁸⁵

Participation in education is mandatory between the ages of 5 and 18, but the upper limit is currently being reduced to age 16.

Crèche (nursery) is a welfare institution catering for children aged 20 weeks to 3 years and providing professional day care and development. Kindergarten education and care is offered for children aged 3-6 and is compulsory from age 5. From September 2015 it will be compulsory from age 3.

Primary and lower secondary education (ISCED 1, 2) is organised as a single-structure system in 8-grade basic schools (typically for pupils aged 6-14, covering grades 1-8). Upper secondary education (ISCED 3, typically for pupils aged 14-18, usually covering grades 9-12) is provided by general secondary schools, vocational secondary schools or vocational schools. However, general secondary schools are also allowed to offer longer programmes starting earlier (from Grade 5 or 7).

General secondary schools provide general education and prepare for the secondary school leaving examination, which is the prerequisite for admission to higher education. Secondary vocational schools provide general and pre-vocational education, prepare for the secondary school leaving examination and offer vocational post-secondary non-tertiary programmes (ISCED 4 C). Vocational schools provide general, pre-vocational and vocational education and may also provide remedial lower secondary general education for those who have not accomplished basic school.

Higher education programmes (ISCED 5-8) are offered by public or private universities and colleges (non-university higher education institutions). In accordance with the three-cycle Bologna degree structure, there are Bachelor degree programmes lasting 6-8 semesters (ISCED 6, 180-240 ECTS credits), which can be followed by Master degree programmes (ISCED 7, 60-120 ECTS credits) for another 2-4 semesters. The third cycle provides doctoral studies (ISCED 8). Nevertheless, there are also undivided long programmes (10-12 semesters, 300-360 ECTS credits, ISCED 6) in some disciplines, e.g. medicine or law.

Adult education and training includes part-time general education programmes at all ISCED levels, vocational education, as well as a wide range of non-formal courses provided by the public and private sector.

A.4.1 Adult education in Hungary

The term adult education covers two educational scenes in the Hungarian setting. Generally it means education and training of individuals over 18 years of age (maturity). It has a dual function:

- it provides another **education opportunity** ('second chance' programmes) for those who want to obtain a first or higher qualification normally obtained in mainstream initial education, and

¹⁸⁵ <http://www.kormany.hu/en/ministry-for-national-economy>

- it provides non-formal education for those who wish to update or upgrade their skills or obtain partial qualifications. In some areas it is also possible to obtain further qualifications in non-formal education and training.¹⁸⁶

School-based adult education: '**Felnőttoktatás**' (meaning adult education) describes adult education taking place within the schools system, aimed at acquiring elementary, secondary, higher or vocational qualifications. At present, students reaching the age of 16 (elementary school) or 21 (vocational or high school) officially can only receive education within the school system as adult education. Students can continue their secondary level education within adult education when they are at least 16. This classification does not depend on when is the learning take place (office hours, evening school etc.).

In a broad meaning of the word, higher education belongs to adult education, as only individuals 18 years and up can participate, but in a narrow sense only part time training (correspondence or evening training and distance education) belongs under the '**felnőttoktatás**' category. Higher-level vocational training courses are also offered at HE level. Students who already have university diploma can enter into doctoral courses and also to postgraduate specialist training course. The legal background is enshrined in two national **Acts**.¹⁸⁷

Adult education taking place outside the traditional school system ('Felnőttképzés' – also meaning adult education) refers to education and training when the learner does not receives legal student status in relation to the institution based on the course s/he is taking part in. When talking about adult education, this is the primary meaning of the word as this is the education that the **Act LXXVII/2013**¹⁸⁸ on Adult Education covers. This recent Hungarian Law on adult education is primarily concerned with a radical re-organisation of an adult vocational education and training sector separate from the school system. It contains requirements for organisation, content, quality assurance, implementation, licensing, monitoring, accreditation and electronic storage of information. However the Law also provides a wide range of definitions and refers to '**adult education**' which aims at '**contributing to adult personality development, social equity and civic competence development.**'

This act in its definition of what adult education means follows in the footsteps of the **Act CI/2001**¹⁸⁹ on Adult Education. However with this new legislation the former moderately regulated system of adult education has been divided. Previously institutions could start the provision of adult education courses (non school-based) by registering themselves and their programmes to a state registry, based on minimal formal requirements. It did not entail any certification of the content. The next level certification was accreditation for both the institution and the programme.

If participants do not receive any form of financial support of participating on the training and the programme does not falls under the categorisation of adult education under the Act, then provision can be organized as free-market training without any formal registry and/or programme certification. These programmes are regulated by the consumer protection law.

Courses belonging to the Act LXXVII/2013 include:

- Vocational education from the National Vocational Registry (OKJ). These courses – although they are not school based – are still considered formal education.
- professional training realised from state or EU funding

¹⁸⁶ http://english.tpf.hu/document.php?doc_name=angol/Magyar_oktatasi_rendszer_en.pdf

¹⁸⁷ https://www.oktatas.hu/pub_bin/dload/.../act_national_education.doc and www.andrassyuni.eu/.../nemzetifelsoktatasiENfinal2012febr162.pdf

¹⁸⁸ http://www.ilo.org/dyn/natlex/natlex4_detail?p_lang=en&p_isn=96515

¹⁸⁹ See <https://books.google.co.uk/books?isbn=1402011466>

- language courses to prepare for the Common European Framework of Reference for Languages or any other language course receiving funding from the state or EU
- any other training for which recipients receive funding.

There is a range of responsible public bodies: **National Office of Vocational Education and Training and Adult Learning in Hungary** is housed within the Ministry for National Economy¹⁹⁰ and this is also the Quality Assurance National Reference Point in VET (EQAVET.Hungary), the national reference point for European Credit System for Vocational Education and Training (ECVET) and the national reference point for the international recognition of qualifications (Europass) which also operates the Hungarian Europass Certificate Supplement on-line filling-in system. The **Ministry of Human Capacities**¹⁹¹ includes the former Ministry of Education (both public and higher education); the **National Development Agency**¹⁹² is responsible for development plans and operational programmes for utilizing funds from the European Union; **Educatio**¹⁹³ manages development in content, methodology and administration in public and higher education; the **Hungarian Institute for Educational Research and Development**¹⁹⁴ provides general and strategic support services for the educational sector; the **Klebsberg Institution Maintenance Centre**¹⁹⁵ (KIMC) holds the responsibility for state control of public education; and **Regional Integrated Vocational Training Centres**¹⁹⁶ (TISZK), whilst not public educational institutions, have been established by public bodies for more effective vocational training.

Six national Associations support adult education in Hungary: the **Association of Adult Educators**¹⁹⁷ currently unites 198 institutions. Its mission is to continuously raise the level of professionalism in adult education, support quality assurance and consumer protection efforts. The **Hungarian Association for Lifelong Learning (ALLL)**¹⁹⁸ is a national umbrella organization in the field of adult education and lifelong learning to promote employability, active citizenship and to contribute to the development of social inclusion, currently with 22 member organisations.

A traditional emphasis on formal qualifications has meant that the benefits of non-formal and informal learning have not always been recognised. Compounded by insufficient public resources and a lack of support from the business sector, this has resulted in a serious deficit in infrastructure provision for adult education.

To tackle this, the Hungarian Association of Lifelong Learning (ALLL) teamed up with the Norwegian Agency for Lifelong Learning (VOX) to establish the **Network of Open Learning Centres in Hungary**¹⁹⁹ (NYITOK) in 2010 in 9 different communities to provide opportunities for learning and competence development addressing local and micro regional needs. The centres are located in areas struggling with high unemployment rates and social deprivation. There is an open approach to local learning to attract as many participants as possible and reach out to often-excluded groups. The project is using a low entry threshold where the learning environment is flexible and easily accessible to all.

Each centre operates tailored programmes focusing on skills which are relevant for the local area and works out competence development programmes in tandem with the local municipalities to ensure that the training offer matches the needs. The training focuses

¹⁹⁰ <https://www.nive.hu/index.php>

¹⁹¹ <http://www.kormany.hu/en/ministry-of-human-resources>

¹⁹² <http://www.szechenyi2020.hu/?lang=en>

¹⁹³ <http://www.educatio.hu/>

¹⁹⁴ <http://www.ofi.hu/en/hungarian-institute-educational-research-and-development>

¹⁹⁵ <http://klik.gov.hu/>

¹⁹⁶ <http://fppti.hu/>

¹⁹⁷ <http://fppti.hu/>

¹⁹⁸ See <http://www.basicsskills.eu/current-members/the-association-for-lifelong-learning-all/>

¹⁹⁹ <http://www.nyitok.hu/>

on developing core competences, such as digital communications, foreign languages and entrepreneurial skills.

Based on the very positive results from 2013 the network of the Open Learning Centres has been extended to 50 centres in the frame of a national project. ALLL provides the resources for the establishment of the newly established centres and also provides professional support for the development and continuous improvement of their adult learning services.

The **Hungarian Folk High School Society**²⁰⁰ is a national level non-governmental organisation specialising in non-formal adult education. It is an umbrella organization with more than one hundred member organisations within Hungary; and the **Türr István Training and Research Institute**²⁰¹ is a public institution dedicated to adult training and the development of research methodology. Its principal responsibility is to support the operation of the Public Employment system and to promote the social inclusion of disadvantaged groups including the Roma, the unemployed, people with low education levels and those living in disadvantaged micro-regions, as well as people whose disabilities reduce their working capacity.

A.4.2 Copyright in Hungary

Hungary has amended its copyright law (the **Copyright Act No. LXXVI of 1999**, as amended)²⁰² to comply with international norms and accede to the European Union. It also has implemented the relevant EU Directives, including the EU Information Society Directive, the EU Enforcement Directive, and the EU Resale Right Directive. In Hungary the Electronic Commerce Act (Act CVIII of 2001) contains detailed regulation with respect to ISP liability and also includes a notice and takedown procedure. The Act is in full compliance with the EC requirements laid down in the relevant EC Directives (basically 2000/31/EC and 98/27/EC). At the end of 2008, the Parliament adopted a law to amend the Copyright Act (in particular, extending the application of the public lending **right and regulating the use of 'orphan works'**). The amendments entered into force on February 1, 2009; the entry into force of the orphan works provisions was postponed until the publication of the implementing government decree (May 16, 2009). A new law on data protection and privacy was also adopted, and came into force on January 1, 2012.

A useful survey (related to the music industry, but of wider application) has been published by **IAML**.²⁰³ The USA still has some concerns about piracy of copyright, though this is largely related to software.²⁰⁴

An important aspect of the IPR in adult learning is the copyright issues of the adult learning programmes. Previously (before the Act LXXVII/2013), accredited programmes **were copyrighted as the programme belonging to the 'founder', the original author, who accredited it.** Institutions who wanted to use the programme could apply within the accreditation process for the rights to start courses based on the programme.

In the new adult learning act, this system changed. New adult learning courses first have to have a programme assessed and accepted by a (state) licensed evaluator. If the programme does not have pre-defined content (e.g. from the programmes of the National Vocational Registry), it has to match a programme-requirement that was previously licensed by the Hungarian Chamber of Commerce and Industry (through a different process). These programme-requirements are public. It is a relatively new

²⁰⁰ See <http://www.eaea.org/en/membership/eaea-members/hungary-hungarian-folk-high-school-society-fhss-ordinary-member.html>

²⁰¹ See <http://www.basicsskills.eu/current-members/turr-istvan-training-and-research-institute/>

²⁰² <http://www.wipo.int/wipolex/en/details.jsp?id=5186>

²⁰³ <http://www.iaml.info/en/activities/copyright/survey/hungary>

²⁰⁴ <http://www.iipa.com/rbc/2012/2012SPEC301HUNGARY.PDF>

process (there is a buffer period regarding the switch to the new licensing requirements) and process descriptions and manuals do not yet contain information on copyright.

Creative Commons licenses have been available in Hungarian since 2005. The Hungarian chapter of the Society was established in 2008 with the aim of support non-profit culture sector and to spread of Creative Commons Licenses in Hungary. Its main focus remained the copyright issues and open access of cultural artefacts and products.

In education there is no mainstream trend of using CC licenses and adult education is a field now in transition with the clear aim of quality assurance of the content of the courses on behalf of the lawmakers. The present regulations of licensing courses and programmes have yet to clarify copyright issues. Training and content providers are very guarded regarding content usage.

A.4.3 OER in adult education in Hungary

The Budapest Open Access Initiative²⁰⁵ arose from a meeting convened in Budapest by the Open Society Institute (OSI) in December 2001. The purpose of the meeting was to accelerate progress in the international effort to make research articles in all academic fields freely available on the internet.

Participants explored how OSI and other foundations could use their resources most productively to aid the transition to open access and to make open-access publishing economically self-sustaining. The result is the Budapest Open Access Initiative. It is at once a statement of principle, a statement of strategy, and a statement of commitment.

The initiative has been signed by the Budapest participants and a growing number of individuals and organizations from around the world who represent researchers, universities, laboratories, libraries, foundations, journals, publishers, learned societies, and open-access initiatives.

The National Research Development and Innovation Office²⁰⁶ (OTKA), the country's major scientific research funder requires all funded researchers to deposit in an OA repository or publish in an OA journal. There is also a Thesis mandate vide Government Decree no 33 (2007) on Doctoral dissertations.

OTKA signed the Berlin Declaration in 2008. 'The scientific publication supported by an OTKA grant has to be made freely available according to the standards of Open Access, either through providing the right of free access during publication, or through depositing the publication to an open access repository. Depositing is possible in a repository of an institution or that of a scientific field, as well as in the Repository of the Library of the Hungarian Academy of Sciences.'

Some groups of the Hungarian research community are aware of Open Access and its benefits, but part of the community is still reluctant to provide Open Access to their publications. The main obstacles are a lack of knowledge about relevant copyright issues and the resistance by researchers to allocate time and effort to the depositing process. Advocacy programmes (attached to a network of institutional repositories) by higher education libraries might be a way of increasing national research visibility and impact.

The Open Access portal²⁰⁷ – formerly HUNOR – Hungarian Open Repositories – aims to provide systematic and updated information about open access and the latest trends in scientific communication, including OA journals, repositories, the business models and related IPR issues.

²⁰⁵ <http://www.budapestopenaccessinitiative.org/>

²⁰⁶ <http://www.otka.hu/en>

²⁰⁷ <http://www.open-access.hu/>

The **Kempelen Farkas National Digital Textbook Library**,²⁰⁸ launched and operated by **Educatio**, has made available free study books, higher education course contents, e-books and journals in digital format on the Internet, in support of students, in particular in higher education since 2005. They use the acknowledged standards and easily useable formats, with easy search-archive and print services. The electronic documents cover a wide spectrum of disciplines, from literature to medicine, agriculture etc. The KF Digital Library has recently been linked to the Arcanum Digital Science Repository, offering access to the highly ranked Hungarian academic journals. By the beginning of 2013, over 2000 digital documents were available.

The **Hungarian Electronic Library**²⁰⁹ (MEK) collects, preserves and provides free of charge digital material in all fields of science and art. In the initiative phase of the project the accession mostly relied on sources already available in some kind of digital form or ones that could be digitised with relatively small effort. The range of sources was (and continues to be) rather wide: besides original Internet-sources, volunteer digitisers, publishing houses and authors can act as donors. In 2004 this launched Hungary's largest digitisation project: the Digital Library of Hungarology, aimed at converting and publishing hundreds of important reference works in electronic form.

One can find information in all fields of interest in the MEK, and all kinds of document types: novels, poems, scientific books and papers, lexicons, dictionaries, maps and paintings. The majority of the documents are in Hungarian, but there are sources in foreign languages as well, in particular the achievements of Hungarian science and culture translated to other languages.

All documents that are selected to be added to the collection undergo a thorough quality-check, are converted into the most popular formats (HTML, XML, PDF, RTF) with standard features, and are described according to current library standards that can be applied to digital items, before going on-line. Due to extensive and detailed metadata attached to each item, the documents are thoroughly indexed and can be found easily via the major search engines.

The **Digital Archive of the Hungarian Social Sciences**²¹⁰ (Mtd@) is a private initiative, aiming to research, discover and publish the works of the significant authors of the Hungarian social science and historical sociology. Its concept is content centric and states that offering equal access to that content is possible in digital environment only. In order to respect the copyright and IPR regulations, the Archive prefers publishing online the works of authors who have been dead for at least 70 years.

MOOCs have been slow to develop in Hungary. Neither the POERUP mapping, nor the Open Education Europa MOOC scoreboard, record any MOOCs currently operating in the country.

A.4.4 Quality for OER in Hungary

Adult education within the school-system follows the same regulations as the main school system. Rules of assessment and progression as well as qualifications obtained in school-based adult education are identical to those obtained in full-time education and this is also the case regarding the accreditation of learning materials. On the primary and secondary school level, following the ICT infrastructure development of the previous years, newly piloted (starting from present school year) – centrally-defined – curricula includes elements of OER. However feedback from teachers and experts alike points to the erratic and low quality nature of the included OER.

²⁰⁸ <http://www.tankonyvtar.hu/hu>

²⁰⁹ <http://mek.oszk.hu/html/torteneteng.html>

²¹⁰ <http://mtdaportal.extra.hu/>

There are also large repositories of learning material developed by teachers to help students prepare for exams, but these are individual initiatives and are not regulated or quality assured centrally.

A.5 Sweden, by Ebba Ossiannilsson and Alastair Creelman

Sweden is a medium-sized EU Member State with a population of just 9.5 million. Its national language is Swedish, which is also an official language of Finland, where it is spoken in some regions including the Åland Islands, an autonomous Swedish-speaking part of Finland.

Education in Sweden is mandatory for all children between age 7 and age 16. The school year in Sweden runs from mid/late August to early/mid June. The Christmas holiday from mid December to early January divides the Swedish school year into two terms. Homeschooling is closely supervised by the government and very limited.

From the age of one, children can be admitted to pre-school (*förskola*). During the year before children start compulsory school, all children are offered a place in a pre-school class (*förskoleklass*), which combines the pedagogical methods of the pre-school with those of compulsory school. Between ages 6/7 and 15/16, children attend compulsory comprehensive school (*grundskola*), divided in three stages. The vast majority of schools in Sweden are municipally run, but there are also autonomous and publicly funded **schools, known as 'independent schools'**. **The education in independent schools has many objectives in common with the municipal school, but it can have an orientation that differs from that of the municipal schools.** A handful of boarding schools, known as **'private schools', are funded by privately paid tuition.**

In 2008, statistics showed that of all Swedes aged 25–64, 15% have completed only compulsory education (as the highest level of attainment), 46% only upper secondary education, 14% only post-secondary education of less than three years, and 22% post-secondary education of three years or more. Women are more educated than men (26% of women as against 19% of men have post-secondary education of three years or more). The level of education is highest among those aged 25–34, and decreases with age. Both upper secondary school and university studies are financed by national taxes. Some Swedes go straight to work after secondary school. Along with several other European countries, the government used to subsidize tuition of non-EU/EEA students pursuing a degree at Swedish institutions, but in 2010 they started charging non-EU/EEA students 80,000-100,000 SEK per year. Swedish fifteen-years-old pupils have the 22nd highest average score in the **PISA**²¹¹ assessments, being neither significantly higher nor lower than the OECD average.

A.5.1 Adult education in Sweden

Since the early 1960s Sweden has been in the forefront in the western world in terms of investment in adult education. In the mid 1970s several reforms were established e.g. on the adult education system and on student welfare. Thanks to those reforms the long tradition of *Folkbildning* (adult liberal education) through the grassroots educational and cultural work in adult education could continue.

The school system for adults includes municipal *adult education, special education for adults* and *training in Swedish for immigrants*. Secondary school on a vocational programme provides qualification for further studies. Most often tertiary education is required for admittance to higher education. Post-secondary education is provided by Municipal '*KomVux*' schools (short for KOMmunal VUXenutbildning, lit. 'Municipal Adult

²¹¹ <http://www.oecd.org/pisa/>

Education'),²¹² and independent boarding schools named *Folkhögskolor*²¹³ (or People's High Schools in English).

A student from a vocational programme in secondary school is able to apply for what is called **Qualified Vocational Education** or '*Kvalificerad Yrkesutbildning*' (KY). This form combines education and practical experience from business or industry in the chosen field. The level of education is essentially post-secondary but can also contain courses that meet the requirements of tertiary education. The KomVux and the Qualified Vocational Education in some ways correspond to what is offered by community colleges in the United States.

Municipal adult education in Sweden is organized in three strands:²¹⁴ adult education, post-secondary vocational education and training, and liberal adult education, adapted from information on the website of the Government Offices of Sweden 2014.²¹⁵

Adult education is organized in three strands:

- **Municipal adult education (Komvux)** at basic level is to help adults gain the knowledge they need to take part in society and working life. It is also meant to prepare adults for further study. Municipal adult education at upper secondary level, in turn, is to equip adults with knowledge corresponding to the levels set for pupils at upper secondary school.
- **Education for adults with learning disabilities (Särvux)** aims to equip these adults with knowledge corresponding to that taught in compulsory and upper secondary schools for pupils with learning disabilities.
- **Swedish for immigrants (SFI)** is intended to equip adult immigrants with a basic knowledge of the Swedish language. A further purpose of Sfi is to teach reading and writing to immigrants who lack basic knowledge of these skills.

Post-upper secondary vocational education and training is organised in two strands:

- **Higher vocational education programmes and courses** are organised by state higher education institutions, municipalities, county councils and private natural or legal persons. The courses are designed and delivered by partnerships between businesses and education providers. Hence, the courses have strong links with working life and a sound theoretical foundation.
- **Supplementary education** helps adults develop knowledge and skills in specific occupational fields and can help to preserve traditional trade skills, among other things.

Liberal adult education (*Folkbildning*) has a long tradition in Swedish society. It includes folk high schools, study associations and student organisations at folk high schools. There is considerable freedom in setting course objectives, while the Government Offices of Sweden defines the conditions of the government grants through the Swedish National Council of Adult Education²¹⁶ **distributes government's grants** to liberal adult education.

Folkbildning (*Folk* means people and *bildning* means learning) is the Swedish form of non-formal adult education. Folkbildning is a voluntary and decentralised form of learning which strengthens and enriches people and thereby the whole of society. Ever since the first study circle was held in 1901, study circles have been a meeting place for increasing

²¹² <http://allastudier.se/tips-o-fakta/49-komvux/>

²¹³ http://en.wikipedia.org/wiki/Folk_high_school

²¹⁴ See <http://www.government.se/sb/d/6997>

²¹⁵ See <http://www.government.se/sb/d/6997>

²¹⁶ <http://www.eaea.org/en/membership/eaea-members/sweden-he-swedish-national-council-of-adult-education-ordinary-member.html>

knowledge and involvement. Sweden's ten study associations organise cultural programmes and lectures. However, it is the study circle which is the cornerstone of folkbildning. In the circle the participants benefit from their own experiences and knowledge and that of others. Folkbildning is part of civil society. Most of the major popular movements in Sweden work in partnership with the study associations, which together have approximately 200 member organisations, which gives access to unique networks, and enabling to engage with people who few other organisations in society are able to reach. Folkbildning organisations have since 1912 financial support from the state. It is generally agreed that folkbildning should be run separately from the state, but be financed by public funds. The importance of folkbildning to Swedish society is recognised by all political parties.

The National Agency for Education in Sweden (Skolverket)²¹⁷ has a special action programme for lifelong learning. The programme aims to create an overview of lifelong learning in the country, identifying and analysing key issues in a strategy for lifelong learning.²¹⁸

A.5.2 Copyright in Sweden

The Act on Copyright in Literary and Artistic Works (1960:729)²¹⁹ is the framework for the overall regulations on copyright for the country. The Act states that anyone who has created a literary or artistic work shall have copyright in that work, whatever kind of media it is produced in.

Creative Commons is working with Göteborg University to create Sweden jurisdiction-specific licenses from the generic Creative Commons licenses. The regulations and guidelines are stated in the site *Creative Commons Sverige*.²²⁰

Although many teachers already use and produce CC resources there are seldom any strategic or policy initiatives. There are however a number of national initiatives that are worth noting:

- **Kolla Källan**²²¹ gives a guide to copyright, Creative Commons, source criticism and plagiarism, aimed at schools and adult education. Amongst many other resources is a brochure explaining Creative Commons for teachers that are widely spread in Swedish schools.
- **Legala Handboken**²²² (English: Legal handbook) is a national guide on legal issues affecting higher education institutions in Sweden. It includes guides on OER and Creative Commons as well as extensive information on issues such as copyright law, archiving, public information legislation, social media and freedom of expression legislation.
- **SE Internet Infrastructure Foundation**²²³ has published a wide range of internet guides for use in all levels of education as well as for public use. The aim of these guides is to raise awareness of digital literacy, net security, integrity and privacy issues, copyright and source criticism. They have produced two guides with relevance to Creative Commons that are freely available: Creative Commons (Kristina Alexanderson, Jessica Bäck) and Copyright – Copyleft (Mathias Klang).

²¹⁷ <http://www.skolverket.se/om-skolverket/andra-sprak-och-lattlast/in-english>

²¹⁸ <http://bit.ly/1JGXvvY>

²¹⁹ http://www.wipo.int/wipolex/en/text.jsp?file_id=241679

²²⁰ <http://www.creativecommons.se/>

²²¹ See <http://www.skolverket.se/skolutveckling/resurser-for-larande/kollakallan>

²²² <http://www.legalahandboken.se/>

²²³ <https://www.iis.se/lar-dig-mer/quider/>

Wikimedia Sverige²²⁴ works in partnership with schools, libraries, universities and local organisations to raise awareness of Wikipedia, Creative Commons and openness in general. Their current initiatives are reported on a blog.²²⁵

A.5.3 OER in adult education in Sweden

In Sweden there is no special or single political strategy or vision to implement OER in adult education. However, although there are a number of initiatives, projects and resources there is no clear overall strategy from government level at present addressing OER issues. The use of OER in Swedish adult education is at present fragmentary, and is more characterised by local and individual initiatives. Consequently this report cannot claim to be comprehensive.

Swedish MOOC development

Sweden was rather late in entering the MOOC movement. One possible explanation is that since there are no fees for higher education (except for non-EU citizens) the issues of mounting student debt and the need for alternatives is not felt so acutely as in other countries such as the USA. In 2014 the first Swedish universities began offering courses via the main global MOOC consortia Coursera and EdX. The Open Education Europa MOOC scorecard records a total of 9 in all.²²⁶ Recent MOOCs include **Chalmers Technical University**²²⁷ – 2 courses during spring 2015; **Karolinska Institute**²²⁸ – 5 courses 2014-2015; **Lund University**²²⁹ – 3 courses during 2015; **Mid Sweden University** – one course in autumn 2014²³⁰ and **Karlstad University** (Lifelong Learning Web) – several open professional development courses for school teachers in cooperation with the National education authority (Skolverket) and Norwegian Lillehammer University College.²³¹ **Uppsala University**²³² is planning to launch MOOCs in 2015.

A Scandinavian MOOC conference, **MOOCs in Scandinavia**,²³³ will be held at Karolinska Institute, Stockholm, 11-12 June 2015. This intends to develop Scandinavian cooperation in MOOC development.

There have also been a number of open courses offered as cMOOCs that have gained much less publicity than the above but are possibly better examples of open practice. Two such courses are **Open Networked Learning**, a 6 week open course for university teachers run by Karolinska Institute, Lund University and Linnaeus University²³⁴ and **Digitala skollyftet** – cMOOC for school teachers on the development and use of OER. 2013-2014.²³⁵

Some more widely known initiatives in OER are **OER resources for learning 2010-2011**, funded by The National Library of Sweden²³⁶ and **OER open possibilities for learning 2012-2013**, funded by the foundation for IT infrastructure.²³⁷

Other notable projects in OER where Sweden is involved include:

- **IMPOERS**,²³⁸ Implementing OER in the Nursing Programme, Dalarna University

²²⁴ <http://se.wikimedia.org/wiki/Huvudsida>

²²⁵ <https://wikimediasverige.wordpress.com/>

²²⁶ http://openeducationeuropa.eu/en/open_education_scoreboard

²²⁷ <https://www.edx.org/school/chalmersx>

²²⁸ <https://www.edx.org/school/kix>

²²⁹ <https://www.coursera.org/lunduniversity>

²³⁰ <http://www.mjun.se/press/2014/mooc>

²³¹ <https://www.llw.se/> and <http://www.kau.se/ctf/forskning/kurser-inom-tjansteinnovation>

²³² <https://www.uu.se/en/>

²³³ <http://ki.se/en/lime/moocs-in-scandinavia-conference>

²³⁴ <https://opennetworkedlearning.wordpress.com/>

²³⁵ <http://oersverige.se/> and <http://skollyftet.se/>

²³⁶ http://www.kb.se/dokument/Om/projekt/open_access/2011/OER%20slutrappport%20v2.pdf

²³⁷ <http://journals.lub.lu.se/index.php/sciecominfo/article/view/5678> and <https://www.internetfonden.se/oer-oppna-mojligheter-for-larande/>

- **Implementing OER in Sound and Music Production**, Dalarna University (no URL so far)
- **Luleå Technical University**, OER-based Occupational Therapy programme in preparation²³⁹
- **Nordic OER**, funded by the Nordic Council of Ministries²⁴⁰
- **SVERD** Boldic Open Learning Resources Online (BOLDIC OLRO)²⁴¹
- **LangOER** aims at enhancing teaching and learning of less used languages through OER/OEP.²⁴² More information about the situation in Sweden is given on the webpage. Within the framework of LangOER project an online course based on David Wiley's framework for transparency, will be offered starting in late March 2015.²⁴³ An analysis of the interaction of the OER repository Lektion.se from a quality perspective will be presented at the EUROCALL conference. Furthermore Gothenburg University through the LangOER project anticipates participation in the Erasmus+ project ExpLOERer.²⁴⁴

Other initiatives include **DIGIREF**,²⁴⁵ Learning and teaching materials (with CC) free and reviewed by the editorial staff of Digiref; **DIGISAM**,²⁴⁶ a secretariat for national coordination of digitisation, digital preservation and digital access to cultural heritage; **Fjärde uppgiften**²⁴⁷ (*Fourth mission*), a library of short video interviews with prominent Swedish researchers aiming to raise public awareness of current research; **Folkbildningsnätet**²⁴⁸ (Swedish non-formal liberal education, *Folkbildning*), a collection of educational resources (films, podcasts, images, texts, lessons etc.) for use in study associations and folk high schools, mostly with CC licenses: it also contains guides and background to help teachers use the resources; **Kursplanering.se**,²⁴⁹ a resource for course design; **Lantmäteriet**,²⁵⁰ the Swedish organisation for mapping (*Lantmäteriet*) provides a huge resource with maps and digital mapping services; **Learnify**²⁵¹ is a commercial platform to access a wide range of learning resources, both open and proprietary (focus on schools); **Lektion.se**²⁵² (Lesson.se) is a repository for OER from teachers all over Sweden aimed at schools but may even be used in adult education; **Länkskafferiet**²⁵³ is a Swedish Link Library for educational use mostly aimed at primary and secondary education and originally developed by the Swedish National Agency for Education; **Matteboken**²⁵⁴ is resources in mathematics; **MKFC Stockholms Folkhögskola**²⁵⁵ (Stockholm liberal adult education college) is a college providing net-based courses often using OER; **Omvärld.se**²⁵⁶ is resources in geography and social studies; **OPEN SNH**²⁵⁷ (Samverkan för nätbaserad högskoleutbildning, Eng. Collaboration for flexible education) is resources primarily for higher education;

²³⁸ <https://impoers.wordpress.com/>

²³⁹ <http://www.ltu.se/edu/programme/FVATG/mer-om-utbildningen/Las-Arbetsterapi-vid-LTU?l=en>

²⁴⁰ <http://journals.lub.lu.se/index.php/sciecominfo/article/view/5678>

²⁴¹ <http://www.boldic.org/>

²⁴² <http://langoer.eun.org/>

²⁴³ <https://www.openlearning.com>

²⁴⁴ http://ipkl.gu.se/english/Research/research_projects/exploerer

²⁴⁵ <http://www.digiref.se/>

²⁴⁶ <http://digisam.se/index.php/en/>

²⁴⁷ <http://fjardeuppgiften.se/>

²⁴⁸ <https://wikimediasverige.wordpress.com/>

²⁴⁹ <http://kursplanering.se/>

²⁵⁰ www.lantmateriet.se

²⁵¹ <http://www.learnify.se/>

²⁵² <http://www.lektion.se/>

²⁵³ <http://www.lanlskafferiet.org/>

²⁵⁴ <http://www.matteboken.se/>

²⁵⁵ <http://mkfc.se/>

²⁵⁶ <http://www.omvarld.se/>

²⁵⁷ <http://www.opensnh.se/>

Re:flex²⁵⁸ is a site dedicated to spreading awareness of flexible learning, digital literacy and e-learning aimed primarily at teachers working in Swedish non-formal liberal education (folkbildning): it contains guides on OER, Creative Commons etc.; **Sambruk**²⁵⁹ (former Digidel) – instigated on the idea that all Swedish municipalities have identical missions, responsibilities and challenges to undertake in order to serve their citizens; **SE Webbstjärnan**²⁶⁰ – provides students and teachers an opportunity to learn more about web, internet and web publishing; **The National Agency for Education (Skolverket)**²⁶¹ is the central administrative authority for the public school system, publicly organised pre schooling, school-age child care and for adult education. The site includes a page with links and information about digital learning resources. One interesting initiative is the search engine Spindeln which is set up to search for digital resources for school work (also as link as below) covers over 200,000 open educational resources; **SPINDELN**²⁶² OER search tool for schools; **StudiSverige**²⁶³ YouTube channel with lessons in several subjects; **The Digital Museum**²⁶⁴ which contains 718,922 objects and exhibitions from 17 museums and collections; **The Open Access project**²⁶⁵ initiated by the National Library of Sweden to promote the visibility, transparency and accessibility of open resources is aimed at exploring, raising awareness of and disseminating OER and the resulting advantages for teaching and learning; **UR Access for universities**²⁶⁶ is a collaborative service from more than 25 educational institutions, providing access to all streamed material, radio- and TV-programmes provided by the Swedish Educational Broadcasting Company (UR); **UR Play**²⁶⁷ the Swedish Educational Broadcasting Company's (UR) media player which allows you to watch and listen to UR's programmes whenever you want to; and **Wikimedia Sweden**²⁶⁸.

Swedish schools in approximately 250 municipalities have implemented one laptop per pupil schemes (One-to-one). In line with the technology rollout many municipalities have also established their own OER collections, but these are mostly stand-alone initiatives and there is so far no national coordination. These collections are often publically accessible and therefore can benefit other educational sectors. Four such initiatives are **Falköping municipality**, **Teacher-on-demand**²⁶⁹, **Kalmar municipality**, **Kollegieblocket**²⁷⁰, **Kunskapshubben** (Årsta school, Stockholm);²⁷¹ and **Köping municipality**.²⁷²

A.5.3 Quality for OER in Sweden

Swedish *folkbildning* (adult liberal education) has worked with OER at a national level through the Swedish National Council of Adult Education (*Folkbildningsrådet*) to provide a platform for the collection and distribution of CC licensed OER created by teachers all over the country. The majority of OER produced has been the result of various local projects thanks to funding in the development of flexible learning. The main drawback of project-based development is that there is no sustainable organisation for updating the

²⁵⁸ <http://www.reflex.folkbildning.net/>

²⁵⁹ <http://www.sambruk.se/projektnatverk/digidel2015.4.554830361429b83aad324f1.html>

²⁶⁰ <https://www.webbstjarnan.se/>

²⁶¹ www.skolverket.se

²⁶² <http://www.skolverket.se/skolutveckling/resurser-for-larande/itiskolan/digitala-larresurser/sok-med-spindeln>

²⁶³ <https://www.youtube.com/channel/UC6isUPfzZc2QgW5FzQ-mRNA>

²⁶⁴ <https://digitaltmuseum.se/>

²⁶⁵ <http://www.kb.se/openaccess/>

²⁶⁶ <http://www.ur.se/Webbar/Access-Mediecentraler3/Access-Mediecentraler/Aktuellt>

²⁶⁷ <http://urplay.se/>

²⁶⁸ <https://www.wikimedia.se/sv/Utbildning>

²⁶⁹ <http://www.teacherondemand.se/>

²⁷⁰ <http://kollegieblocket.ksgyf.se/home>

²⁷¹ <http://www.kunskapshubben.se/>

²⁷² <http://www.koping.se/nyhetslista/nyhetslista/kopings-larare-delar-med-sig/>

resources. The key quality assurance issue in the use of OER in this form of adult learning that the resources can easily be updated and adapted by all rather than being locked by outdated formats, often because the projects that created them have dissolved and no one takes responsibility for maintenance. The Swedish National Council of Adult Education has also stipulated that all resources produced by projects should have CC BY-NC-SA licenses and that the responsible schools should not profile the resources with their own logos. So far no studies have been carried out as to how OER can contribute to raising participation rates in adult education or whether issues of accreditation/validation of skills and competences acquired via OER can be considered.

The use of OER is still not mainstream even if there are many repositories, initiatives and projects. When they are used it is often within one organisation/school and seldom across organisational structures.

Although there are international quality methods available, as for example the TIPS framework, there is little evidence that they have been used. Two often-voiced concerns with OER in education are the lack of quality assurance and the difficulty of finding reliable material.

Initiatives listed earlier such as Spindeln, Länkskafferiet and Open SNH follow internationally accepted standards for metadata (Dublin Core etc.) and resources have considerable information for teachers and users. However there is little guidance for teachers about how to integrate all these resources into their teaching and the major issue is a question of culture. Changing the culture of teaching and learning towards one of sharing and collaboration takes time to achieve even if the resources, technology and methods exist.

A.6 Latvia, by Ilmars Slaidins

Latvia is a small EU Member State with a population of just over 2 million.

In Latvia, pre-school education for five- and six-year-old children is compulsory. Primary and lower secondary education is organised as a single structure system (*pamatizglītība*), beginning at the age of 7 and consisting of nine years of compulsory schooling. Upper secondary education is not compulsory, but the proportion of population with completed upper secondary education is still high. Higher education is provided by 48 largely autonomous institutions: 31 state organisations (universities, HEIs and colleges) and 17 private organisations (HEIs and colleges). Adult education is a constituent part of the lifelong education system and is provided in formal programmes and non-formal and informal courses.

The Council of Europe International Review Team concluded that the Latvian model of hobby education is a best practice example of extra-curricular education.²⁷³ Latvia has a long and successful tradition of extra-curricular education, called interest-related or hobby education, provided in broad areas: arts, sports, technical education etc. both by schools and hobby education centres. Institutions of interest-related education offer free or low-cost extra-curricular, leisure and summer activities to children and young people between the ages of 3 and 25 and more than 70% of young people participate in this interest-related or hobby education.

Latvia not only protects but also provides considerable support for ethnic minority languages, education and culture. The state continues to develop and finance its bilingual education²⁷⁴ model providing publicly-funded education in seven minority languages: Russian, Polish, Hebrew, Belarusian, Ukrainian, Estonian, and Lithuanian. In the school

²⁷³ http://www.coe.int/t/dg4/youth/Source/IG_Coop/YP_Latvia_en.pdf

²⁷⁴ See https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Latvia:Organisational_Variations_and_Alternative_Structures_in_Single_Structure_Education

year 2013/2014, there are 99 schools with instruction in Russian, and 65 bilingual (Latvian and minority language programmes) schools. Each of these schools is entitled to determine by itself which subjects are taught in Latvian, but the total should be 60% of all subjects.

The education system of the Republic of Latvia is governed by the Ministry of Education and Science. Although early childhood education and care is managed by local authorities the Ministry of Education and Science sets the legal framework for organisation and content of early childhood education.

In December 2012, the Parliament adopted the final wording of the **National Development Plan 2014-2020**²⁷⁵ (NDP), which is closely related to the Latvian plan for implementation of the **Europe 2020** strategy.²⁷⁶ NDP assigns responsibility to the Ministry of Education and Science for investment in and modernisation of education and development of competencies in life-long learning and also sets target indicators for defined priorities.

A.6.1 Adult education in Latvia

The Ministry of Education and Science webpage²⁷⁷ describes adult education and lifelong learning as follows:

Adult education includes all types of formal, non-formal and informal education including further and interest education, professional upgrading and in-service training. It is provided to satisfy needs in lifelong education process to support personal development and competitiveness in the labour market regardless of person's age and previous education.

Lifelong learning²⁷⁸ is a an education process throughout one's life that is based on the changing needs to acquire knowledge, skills, experience, to increase or change one's qualifications in accordance with the requirements of the labour market, or one's interests or needs. Lifelong learning combines non-formal learning with formal education and develops innate skills along with new competencies.

The **Progress Report**²⁷⁹ of the **National Reform Programme of Latvia for the Implementation of the Europe 2020 Strategy** talks about the enhancement of lifelong learning opportunities through distance education:

In the academic years 2012/2013 and 2013/2014, a number of education institutions provided people with opportunities to acquire education in the evening (shift), distance and continuing education programmes. The list of education institutions contains data on 28 evening (shift) schools, including 7 distance secondary schools and 69 evening class and distance consultation points within the full-time schools. In the academic year 2012/2013, a total of 11,727 students studied in the evening and distance education programmes (85% of students in the evening and distance education programmes were 18 years old and older).

The **Guidelines for the Development of Education 2014–2020**²⁸⁰ were approved by the Latvian Parliament on May 22, 2014 and concluded that the adult education target set for 2013 to reach 12.5% of adult population involved in education had not been achieved, with a decline from 8.9% participation in 2004 to 5% in 2012, following the EU economic crisis. A target has now been set to reach 15% adult participation in education

²⁷⁵ http://www.pkc.gov.lv/images/NAP2020%20dokumenti/NDP2020_English_Final.pdf

²⁷⁶ http://ec.europa.eu/europe2020/pdf/nd/nrp2013_latvia_en.pdf

²⁷⁷ *The Educational System in Latvia*, <http://izm.izm.gov.lv/education/education-system.html>

²⁷⁸ <http://izm.izm.gov.lv/education/9422.html>

²⁷⁹ http://ec.europa.eu/europe2020/pdf/csr2014/nrp2014_latvia_en.pdf

²⁸⁰ <http://m.likumi.lv/doc.php?id=266406> (in Latvian)

by 2020. The term OER is not used in this document. The document also reports that in higher education there are about 80 distance education programmes offered with more than 3000 courses provided in virtual learning environments (mainly Moodle). These are used also for full time students. Regional Higher Educational institutions are offering around 130 continuing and professional educational courses and programmes, as well as lectures and workshops. The most popular subjects are languages and computer skills.

In Riga there are several distance education schools and colleges: **Riga Distance Education Secondary School**,²⁸¹ **Riga 1st Distance Education Secondary School**,²⁸² **Riga Distance Education Commerce School**,²⁸³ which is combined with its sister **Business Management College**,²⁸⁴ and Latvian **Business College (LBK)**.²⁸⁵ It is possible for adults (fee paying) to study at all of these institutions.

The **Latvian Adult Education Association**²⁸⁶ (in Latvian – *Latvijas Pieaugušo izglītības apvienība*), LAEA, is a non-governmental, non-profit organisation, which unites adult education providers in Latvia – both individuals and organisations. There are 48 member organizations: local and regional adult education centres, continuing education centres in Higher Educational institutions, other organizations and associations. Their course offer is very diverse, ranging from lectures and workshop to e-learning based language and e-skills courses. There is also a new organization – **The Latvian Association of Higher Education Institutions for Lifelong Learning (LAKMA)**²⁸⁷ which is a society linking ten higher education institutions of Latvia on a voluntary basis.

A.6.2 Copyright in Latvia

According to the **Copyright Law of Latvia**²⁸⁸ (Section 19, Paragraph 2, Clause 2) work of an author could be used without the consent of the author and without remuneration for educational and research purposes taking into account conditions given in Section 21 and Section 18.

Section 21 states:

(1) It being mandatory that the title and name of the author of the work are indicated and that the provisions of Section 18 of this Law are observed, it is permitted to use communicated or published works or fragments of them in textbooks which are in conformity with educational standards, in radio and television broadcasts, in audio-visual works, in visual aids and the like, which are specially created and used in the face-to-face teaching and research process in educational and research institutions for non-commercial purposes to the extent justified by the purpose of their activity.

(2) The provisions of this Section shall not apply to computer programs.

Conditions for use of copyright materials for educational purposes can also be found in Sections 23, 26, 35, and 59 of the Law.

The **Library of the University of Latvia**²⁸⁹ is a contact point in Latvia for the Open Access movement and a participant in the **OpenAire**²⁹⁰ project. During an international

²⁸¹ <http://www.talmacibasvsk.lv/eng/page0/>

²⁸² <http://www.r1tv.lv/lv>

²⁸³ <http://www.rigaskomercskola.lv/>

²⁸⁴ http://www.bvk.lv/?lang=en_us

²⁸⁵ <http://www.lbkeu.com/contacts/>

²⁸⁶ <http://www.laea.lv/home/laea/about-laea.aspx>

²⁸⁷ <http://lakma.lv/en>

²⁸⁸

http://www.gencs.eu/uploads/european_patent_trademark_registration/latvia/Copyright%20Law%20Latvia.pdf

²⁸⁹ <http://www.biblioteka.lu.lv/eng/>

²⁹⁰ <https://www.openaire.eu/>

event related to Open Access and Copyright issues in October 2013 it was said that Creative Commons licensing has not yet been introduced in Latvia.


Movement OpenFM tries to use Creative Commons licences in Latvia,²⁹¹ but recognize that *'Unfortunately current copyright law of Latvia conveniently contradicts the Creative Commons license thus preventing it from being applicable in Latvia.'*


There is an Open Access database at the **Riga Technical University**.²⁹² When uploading scientific papers or other documents an author must confirm (ticking the box) that there are no limitations (violation of any agreement or legal rights) to upload the document(s) to the Open Access database and must use one of Creative Commons licence options (see picture on the next page).


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
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A.6.3 OER in Adult education in Latvia

There is a Lifelong Learning policy document²⁹³ for Latvia – **Programme for 2008-2010 for Implementation of Lifelong Learning Policy 2007-2013**. Although the development of open resources is implied in this document, the terms 'e-learning', 'virtual' and 'OER' are not used in this document. The policy documentation related to adult and lifelong education does not identify any specific targeted tasks and actions planned to introduce (or directly support introduction) of OER and MOOCs.

Latvian organisations have been involved in a range of EU projects related to aspects of open education for adults, including **Telecentre Multimedia Academy**²⁹⁴ (2012-14); **UniteIT**;²⁹⁵ and **Trans e-Facilitator**.²⁹⁶ In the Baltic region, Latvia was involved in the **NORDLET** project²⁹⁷ from 2009-2011.

The Distance Education Centre at the Riga Technical University²⁹⁸ is involved in many distance learning and e-learning projects, including the development of OER. One of their

²⁹¹ <https://wiki.creativecommons.org/Latvia>

²⁹² <http://www.rtu.lv/en/>

²⁹³ http://izm.izm.gov.lv/upload_file/lzglitiba/Muzizglitiba/LLL_Programme_Latvia_EN.pdf

²⁹⁴ <http://tma.telecentre-europe.org/>

²⁹⁵ <http://www.unite-it.eu/>

²⁹⁶ <http://www.trans-efacilitator.eu/content/sections/>

²⁹⁷ <http://wiki.teria.no/display/nordlet/Home>

²⁹⁸ <http://www.vu.lv/index.php?lang=en>

recent projects was cross border Latvian-Lithuania project **eBig3**.²⁹⁹ This project combined three aspects of technology enhanced learning in complementary ways (eLearning – mainly computer and/or internet-based learning; tLearning – TV based learning; mLearning – learning with a use of mobile devices) to produce an effective and innovative cross-media learning delivery system (eBig3) that goes beyond traditional web-based learning approaches. The project received the **BOLDIC Award for 2013**³⁰⁰ and the annual BOLDIC conference for 2014 was organised in Riga with the theme of open resources online.³⁰¹ Based on the eBig3 idea a portal **Modernā Interese Izglītība**³⁰² was created, for professional training of teachers enabling them to become a supervisor of pupil hobby groups in robotics, mobile applications, presentation and other. Training courses combine e-learning, virtual meetings and workshops.

There have been a number of OER-related activities relevant to adult education and several projects and organizations offering training in e-skills for adults.

Organization **LIKTA (The Latvian Information and Communications Technology Association)**³⁰³ is very active in promoting e-skills. There are organized e-Skills Weeks in Latvia. In 2014 there were 850 events covering 95 regions of Latvia (from 110 regions altogether) with more than 38 000 participants involved – a number of these use open resources. A computer skills training programme for seniors (age over 50)³⁰⁴ has been running since 2008, with the webpage in both Latvian and Russian. Overall results for 2014 training³⁰⁵ are shown below:



There are e-skills courses in the Latvian library network – the **Riga municipality's** home page³⁰⁶ is typical.

Higher educational Institutions offer several their courses as OER in their e-learning environment (mostly Moodle) but require registration as a guest. Examples of these include the **University of Latvia Science and Mathematics Education Centre**,³⁰⁷ providing OER (interactive learning resources, video, learning games etc.) for basic and

²⁹⁹ <http://www.ebig3.eu/v2/startp.php>

³⁰⁰ <http://www.boldic.org/boldic-award/nomineringar-till-boldic-award/>

<http://www.boldic.org/boldic-award/nomineringar-till-boldic-award/>

³⁰¹ In <http://www.boldic.org/activities/boldic-olro-riga-2014/>

³⁰² <http://mii.lv/>

³⁰³ <http://www.likta.lv/EN/Pages/home.aspx>

³⁰⁴ <http://www.piesledzieslatvija.lv/lv>

³⁰⁵ <http://www.unite-it.eu/profiles/blogs/gow-2014-latvian-national-coalition-for-skills-and-jobs-evaluates>

³⁰⁶ See http://iite.unesco.org/files/OER_and ICT/Balina%20OER_Latvia.ppt

³⁰⁷ <http://www.dzm.lu.lv/>

secondary schools (pupils and teachers) in Latvian; **Liepaja University** with instructions on how to access OER;³⁰⁸ the Riga Technical University offering **EDUSPACE**³⁰⁹ – a platform based on Moodle for educational institutions to develop their e-learning – with OER courses, e.g. 'Distance education and e-learning methodology and technology';³¹⁰ and the **Latvian Agricultural University**³¹¹ provides links to international OER.³¹²

There are a number of language related initiatives promoting the development of OER, with particular attention to minority languages – e.g. Latgalian.

Sanita Lazdina and Ilze Suplinska from **Rezekne Higher Education Institution (RHEI)**³¹³ joined the **Language OER** consortium³¹⁴ and provides OER available in Latgalian and Latvian languages as language learning resources. Collections of Latgalian OER include **Naktineica**³¹⁵ (traditional and contemporary Latgalian Folklore, proverbs and sayings); **Future of museums**³¹⁶ (Latgalian culture, signs, virtual galleries); and Latgalian exercises.³¹⁷ OER collections in Latvian include **Maci un macies**³¹⁸ (teach and learn Latvian. Audio, video materials, interviews, broadcasts, games, dictionaries, films, didactic materials for independent learning or in class); **Pasakas**³¹⁹ (talking books with fairytales in Latvian, Russian and English with dictionary and tasks); **Surfacelanguages**³²⁰ and **Sazinas tilts**³²¹ for learning Latvian online; and **Valoda**³²² (teaching aids for learning Latvian, culture, folklore, etc.).

A.6.4 Quality for OER in Latvia

Nationally, there are detailed quality assurance regulations for general and vocational education programmes (2010)³²³ and higher education (2012³²⁴ and 2013³²⁵). However, none of the government documents mention OER.

There is a public organization **e-MLKA** (Electronic Educational Resource Quality Association),³²⁶ created in 2009 which aims to bring organisations and individuals together to maintain high quality electronic educational resources. This organization has a portal for teachers (for registered users only) with more than 5000 digital educational resources.³²⁷ However, there is no detail available as to how the aims of the Association are to be achieved, or what progress has been made.

Apart from e-MLKA (with the reservations described above), assuring OER quality remains in the hands of individual institutions.

³⁰⁸ <http://www.liepu.lv/lv/975/brivpieejas-macibu-materiali>

³⁰⁹ <https://eduspace.lv/>

³¹⁰ <https://eduspace.lv/course/view.php?id=325>

³¹¹ <http://www.llu.lv/>

³¹² <http://estudijas.llu.lv/course/view.php?id=584>

³¹³ <http://www.ru.lv/en/>

³¹⁴ <http://langoer.eun.org/> – and see http://langoer.eun.org/c/document_library/get_file?uuid=db61536a-3132-4ad3-a481-ad337a30bcb1&groupId=395028

³¹⁵ <http://www.naktineica.lv/>

³¹⁶ <http://www.futureofmuseums.eu/>

³¹⁷ <http://languagesindanger.eu/book-of-knowledge/list-of-languages/latgalian/>

³¹⁸ <http://maciunmacies.valoda.lv/>

³¹⁹ <http://pasakas.letonika.lv/>

³²⁰ <http://www.surfacelanguages.com/language/Latvian>

³²¹ <http://www.sazinastilts.lv/language-learning/excursions/>

³²² <http://valoda.aialab.lv/>

³²³

http://www.zvaigzne.lv/lv/gramatas/e_gramatu_palidziba/bezmaksas_lejupieladejamie_materiali_pedagogiem/

³²⁴ <http://m.likumi.lv/doc.php?id=217947&from=off>

³²⁵ <http://m.likumi.lv/doc.php?id=256418>

³²⁶ <http://www.emlka.lv>

³²⁷ <http://skolotajs.lv/Lapas/Sakums.aspx>

A.7 Germany, by Giles Pepler with advice from Suzanne Friz

Germany is a large EU Member State with a population of just over 80 million. It comprises sixteen states which are **collectively referred to as 'Länder'**. Each state has its own state constitution and is largely autonomous in regard to its internal organisation, including education. There are large differences in size and in population, from over 10 million (North Rhine-Westphalia, Bavaria and Baden-Württemberg) to under 1 million (Saarland and Bremen). This brings its own problems with inter-Land cooperation.

In the Federal Republic of Germany responsibility for the education system is divided between the Federation and **the Länder**. **The scope of the Federal Government's** responsibilities is defined in the Basic Law (**Grundgesetz**).³²⁸ Unless the Basic Law awards legislative powers to the Federation, the Länder have the right to legislate. Within the education system, this applies to the school sector, the higher education sector, adult education and continuing education. Administration of the education system in these areas is almost exclusively a matter for the Länder. In addition to this division of responsibilities the Basic Law also provides for particular forms of cooperation between the Federation and the Länder within the scope of the so-called joint tasks (**Gemeinschaftsaufgaben**).

Early childhood education and care is not part of the state-organised school system in Germany but almost exclusively assigned to the child and youth welfare sector. On the federal level, within the framework of public welfare responsibility lies with the Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (**Bundesministerium für Familie, Senioren, Frauen und Jugend – BMFSFJ**).³²⁹ As a rule, in the year in which children reach the age of six, they are obliged to attend primary school. All pupils in Germany enter the Grundschule which in almost all Länder covers grades 1 to 4. Following the primary school stage, secondary education in the Länder is characterised by division into the various educational paths with their respective leaving certificates and qualifications for which different school types are responsible. Once pupils have completed compulsory schooling they move into upper secondary education. The range of courses on offer includes full-time general education and vocational schools, as well as vocational training within the **duales System** (dual system). The tertiary sector encompasses institutions of higher education and other establishments that offer study courses qualifying for entry into a profession to students who have completed the upper secondary level and obtained a higher education entrance qualification. As part of lifelong learning, continuing education is assuming greater importance and is increasingly becoming a field of education in its own right. In response to the vast range of demands made on continuing education, a differentiated structure has been developed.

A.7.1 Adult education in Germany

Adult and continuing education institutions offer a variety of courses and subject areas covering general, vocational, political and continuing academic education. The aims, content and duration of courses vary accordingly.

The original objective of *learning for learning's sake* increasingly gave way to the task of responding to the educational needs arising from the demands of the state, society and industry. Since 1970, a more vocational slant, an emphasis on formal qualifications, systematisation and a new understanding of continuing education have been gaining importance.

³²⁸

https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Germany:Legislation#Constitution_law_.2F_Federal_law

³²⁹ <http://www.bmfsfj.de/>

Continuing education in Germany is regulated by the state to a lesser degree than other areas of education. The justification given for this is that the diverse and rapidly-changing demands on continuing education can best be met by a structure which is characterised by diversity and competition among the institutions and the range of courses and services on offer. A central principle of continuing education courses is that attendance should be voluntary.

The activities of the state in the field of continuing education are, for the most part, restricted to laying down principles and to issuing regulations relating to organisation and financing. Such principles and regulations are enshrined in the legislation of the Federal Government and the Länder. State regulations are aimed at establishing general conditions for the optimum development of the contribution of continuing education to lifelong learning.

The joint responsibilities of the Federation and the Länder include research and pilot schemes in all sectors of continuing education. In addition, Federation and Länder are responsible for statistics on continuing education and for drawing up reports on continuing education in their respective areas of responsibility. The responsibilities of the Länder include in particular the following powers to regulate and promote continuing general education; continuing education leading to school-leaving qualifications; continuing academic education at higher education institutions; continuing cultural education; some elements of continuing political education; and some elements of continuing vocational training.

The prerequisites and principles for the promotion and funding of continuing education are laid down in continuing education legislation³³⁰ and employment release legislation. Continuing and adult education legislation describes continuing education as an independent education sector which incorporates continuing general and political education and continuing vocational training and the development of which is the responsibility of the public sector. Continuing education legislation guarantees a diverse range of institutions maintained by a variety of organisations and lays down a state approval procedure for such institutions. All Land legislation includes regulations which recognise their freedom in the preparation of curricula and independence in staff selection. Each of the Länder has its own website and portal for training opportunities³³¹

In 12 of the 16 Länder legislation allows employees to attend continuing education courses (paid educational leave – *Bildungsurlaub*) for several working days per year (usually five) with no loss in earnings, provided that certain conditions are fulfilled. In addition to the responsibilities which are carried jointly by the Federation and the Länder, **the Federal Government's responsibilities include in particular: continuing vocational training outside the school sector; regulated further vocational training; basic regulations for the protection of those on distance learning courses which are offered under private law; some areas of continuing political education; and international cooperation in continuing education, including within the European Union.**

Responsibility for the promotion of continuing vocational training under the Federal Government's Social Security Code III lies with the Federal Employment Agency (*Bundesagentur für Arbeit*). Promotion under the Social Security Code III includes the following measures:

- Further vocational training: schemes to assess, maintain, extend or adapt the vocational knowledge and skills of adults who have a vocational qualification or appropriate work experience. (Upskilling courses for vocational training are normally accessed through Job Centres).

330

https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Germany:Legislation#Continuing_education_legislation_of_the_L.C3.A4nder

331 <http://www.kmk.org/bildung-schule/allgemeine-weiterbildung/weiterbildung-in-den-laendern.html>

- Vocational retraining leading to a qualification in an *anerkannter Ausbildungsberuf* (recognised occupation requiring formal training): targeted mainly at unemployed people with no vocational qualifications.

With the coming into force on 1 January 1996 of the Upgrading Training Assistance Act (*Aufstiegsfortbildungsförderungsgesetz*), a new comprehensive funding instrument was created in Germany for financing training designed to lead to promotion at work. With the coming into force on 1 January 2002 of the first amendment of the Upgrading Training Assistance Act, the promotion of professional career advancement was further improved. Within the scope of the Qualification Initiative for Germany 'Getting ahead through education' (*Aufstieg durch Bildung*), promotion under the Upgrading Training Assistance Act was further extended in 2009. Under the Vocational Training Act (*Berufsbildungsgesetz*) and the Handicrafts Code (*Handwerksordnung*), responsibility for examinations in further vocational training generally rests with the chambers (e.g. chambers of handicrafts and chambers of industry and commerce). Where there is a national regulatory interest, examinations in further vocational training are regulated by ordinances of the Federal Ministry of Education and Research (*Bundesministerium für Bildung und Forschung* – BMBF). The content of examinations is laid down by regulations of the competent bodies or by ordinances passed by the Federal Government.

Flexible training allows working adults the opportunity for distance learning. Most courses are available through private organisations and offer certification. They are regulated through the Law on Protection of Participants in Distance Learning and in 2010 just over 203,000 people participated. The range of topics is wide and comprises social sciences, Education, psychology, humanities, languages, business and commerce, mathematics, science, technology, leisure, health, Housekeeping, school courses (e.g. B. High school, College student, Abitur) level courses and degree completion as a state-certified business manager, Engineer and translator, computer courses. The main focus is on the area of business and commerce with 25.3% of all participants. The use of ICT as a means for self-directed learning is increasingly important in adult education and training is increasingly important, with many courses wholly or partially online.

Lifelong learning courses are also provided through the Volkshochschule,³³² organised both nationally, and through each Land. The main courses available are in foreign languages, humanities, business English and IT.

A.7.2 Copyright in Germany

Germany subscribes to the Berne Convention. The German the copyright law and related rights are regulated in the Urheberrechtsgesetz Act from 1965,³³³ most recently modified in 2008, to implement EU Directive 2001/29C.³³⁴

Copyright law in education follows the EU Directives. In 2003, Germany incorporated Article 5, Section 3 of EU Directive 2001/29/C (Making works available to the public for instruction and research. This states:

It shall be permissible for published small, limited parts of a work, small scale works, as well as individual articles from newspapers or periodicals for illustration in teaching at schools, universities, non-commercial institutions of education and further education, and at vocational training institutions, exclusively for the specifically limited circle of those taking part in the instruction, or

³³² <http://www.vhs.de/>

³³³ http://www.gesetze-im-internet.de/englisch_urhg/index.html

³³⁴ <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32001L0029&from=DE>

... exclusively for a specifically limited circle of persons for their personal scientific research to be made available to the public, to the extent that this is necessary for the respective purpose and is justified for the pursuit of non-commercial aims.

This article regulates the copyright law in German schools, so that material can be copied for instruction in schools, but cannot be used outside, e.g. on school-websites. The copyright law is very restrictively used in schools.

Creative Commons licences are used more in universities, but relatively little for schools or VET resources.

A.7.3 OER in Adult education in Germany

The lifelong learning courses provided through the **Volkshochschule**³³⁵ are usually classroom and textbook based. Where textbooks are not available, teachers often compile their own resources but these are rarely shared as teachers are fearful of criticism.

Distance learning courses by universities and private organizations (distance learning institutes) are unlikely to contain OER. Even if a university uses OER in its campus-based courses, these resources may not be available to distance learners, as they are not necessarily enrolled as full university students and university generated resources are not necessarily of good quality.

There has been considerable talk of a portal for OER at national level, but nothing definite has yet emerged. Dr. Dominic Orr reports through the OE Consortium that OER in Germany remains largely a grassroots phenomenon,³³⁶ though interest is rising. Whilst many countries have been supporting OER through policy interventions over the past 5 years or so, Germany currently has no national strategy for this area. Although interesting OER projects and initiatives are occurring and experiencing success, these – such as **Wikimedia Germany**,³³⁷ **Schulbuch-o-mat**,³³⁸ **Book Sprint**,³³⁹ **Serlo**³⁴⁰ and **Lernox**³⁴¹ – are largely targeted at the schools sector. However, policy discussions on national level are progressing and it is expected that a national policy recommendation on OER will emerge in the late spring of 2015.

MFG Innovation Agency for ICT and Media³⁴² are one of the partners in a 2014-16 Erasmus+ project **OERup!**,³⁴³ which aims to identify the current status of OER in adult education institutions, raise awareness of the value of OER, create a quality framework for OER and improve the skills of digital professionals involved in delivering adult education. The project is due to deliver a needs analysis as its first major deliverable at the end of March 2015, but this has not yet been released.

Germany has moved ahead quite rapidly in the field of MOOCs, though the pace appears to have slowed recently. The **Open Education Europa scorecard**³⁴⁴ records 50 MOOCs in August 2014, but the most recent update (February 2015) only shows 11 active ones.

³³⁵ <http://www.vhs.de/>

³³⁶ <http://www.oeconsortium.org/2014/11/in-germany-oer-remains-largely-a-grass-roots-phenomenon-but-policy-interest-is-rising/>

³³⁷ <https://www.wikimedia.de/wiki/Hauptseite>

³³⁸ <http://www.schulbuch-o-mat.de/>

³³⁹ <http://www.booksprints.net/about/>

³⁴⁰ <http://de.serlo.org/>

³⁴¹ <http://lernox.de/remix/>

³⁴² <http://www.innovation.mfg.de>

³⁴³ <http://www.oerup.eu/the-project/>

³⁴⁴ http://openeducationeuropa.eu/en/open_education_scoreboard

The extent to which the resources are OER is, however, questionable. **Iiversity**³⁴⁵ is the most significant provider of free online courses, all of which are mapped into ECTS.³⁴⁶

A.7.4 Quality for OER in Germany

The entire school system is supervised by the Federal government, with responsibility for quality assurance delegated to the Länder. Detailed provisions are set out in the Education Acts.³⁴⁷ Quality assurance in in-company vocational training is achieved mainly through laws and regulations and through the recommendations of the board of the Federal Institute for Vocational Education and Training.³⁴⁸ The Framework Act for Higher Education³⁴⁹ (*Hochschulrahmengesetz*) sets out quality procedures for universities. In their laws and statutory provisions for the promotion of continuing education, Federation and Länder have formulated general minimum requirements of a structural and quantitative nature for institutions of continuing education and some Länder have adopted specific quality assurance standards in their statutory provisions. In the area of distance learning, the Law on the Protection of Participants in Distance Education³⁵⁰ (*Fernunterrichtsschutzgesetz*), as well as the control by the Central Office for Distance Learning of the Länder³⁵¹ (**Zentralstelle für Fernunterricht der Länder**) provides further quality assurance.

However, none of these structures mention OER and quality assurance of OER is largely ignored by the current systems – it remains up to individual organisations to provide their own QA.

A.8 Romania, by Giles Pepler with advice from Diana Andone

Romania is a medium-sized EU Member State, with a population of nearly 20 million. The official language is Romanian – this also has official status in the Republic of Moldova (including Transnistria), and the Autonomous Province of Vojvodina in Serbia.

The national pre-university educational system is regulated by the 2011 Law on National Education³⁵² and organised into four levels:

- Early education (0 – 6 years), including *the ante-preschool level* (0-3 years – the Ministry is not responsible for this) and *pre-school education* (3-6 years);
- primary education which includes the preparatory grade and 1st – 4th grades; secondary education, which includes lower secondary or middle education (5th – 8th grades; upper secondary education which can be high school education, (9th – 12th/13th grades), with three pathways: theoretical, vocational and technological; – vocational education with a duration of 3 years;
- tertiary non-university education, which includes post-high school education.

Compulsory education consists of primary education, lower secondary education and the first 2 years of upper secondary education.

The Romanian higher education system is in line with the Bologna Agreement. As a result, most Bachelor programmes take 3 years to complete. However, some programmes last longer – e.g., medicine and architecture. **Master's programmes take 2**

³⁴⁵ <https://iversity.org/>

³⁴⁶ http://ec.europa.eu/education/tools/ects_en.htm

³⁴⁷ See

https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Germany:Legislation#School_legislation_of_the_L.C3.A4nder

³⁴⁸ <http://www.bibb.de/>

³⁴⁹ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Germany:Legislation#Federation_3

³⁵⁰ https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Germany:Legislation#Federation_4

³⁵¹ <http://www.zfu.de/>

³⁵² <http://www.edu.ro/index.php/legaldocs/14847>

years beyond the Bachelor's degree and are a prerequisite for admission to Ph.D. programmes. Ph.D. programmes usually take 3 years to complete. Under special circumstances, the duration of study may be extended by 1 or 2 years. Romania has a large higher education sector with 54 public universities and approximately 40 accredited private universities. The 2011 Law on National Education introduced a new university classification system, identifying three types of institution: education-centred (bachelor degrees only); education- and research-centred (bachelor and master degrees); advanced research and education-centred (includes doctoral degrees). A university can move from one category to another. Further flexibility is provided to the extent that, e.g., a university classified as education-centred can offer master or doctoral studies in certain fields, provided that the specific programme has been evaluated to be of high quality. Funding will be dependent on the type of university and the results of a ranking of study programmes.

Among the educational priorities of the **2012 government programme of 2012**³⁵³ are

- a continuing education programme for teachers co-financed with European funds;
- 'The school of the second chance': reintegration in schools of children who have dropped out of school;
- 'The school after the school': pupils may remain in the school building after the end of the lessons for tutoring sessions or as participants of organized sport, interest and recreation activities;
- adapting learning programmes to meet societal and individual needs;
- creating **community centres for lifelong learning**,³⁵⁴
- the development of the **RoEduNet**³⁵⁵ network for improving internet access across the country.

A.8.1 Adult education in Romania

Adult (lifelong) education in Romania is regulated by two Ministries: the Ministry of Education and the Ministry of Labour. All adult education connected with universities is covered by the Ministry of Education.

A key aspect is the work of **IREA**³⁵⁶ – the Romanian Institute of Adult Education – which was founded in March 2000, based at **UVT (the West University of Timișoara)**³⁵⁷ with **ISRBC (the Social Romanian Institute Banat-Cristana)**³⁵⁸ and **DIE (the German Institute for Adult Education)**³⁵⁹ as partners. IREA was established as a non-profit institution as a pedagogic research institute in the field of adult and continuing education aiming to provide support for all adult education institutions in Romania.

Whilst postgraduate certificates are undertaken exclusively through universities under the aegis of the Ministry of Education, the Ministry of Labour oversees adult education concerned with vocational retraining and upskilling, including basic skills courses. To obtain approval courses have to fulfil competences from the Workforce Catalogue for Romania and be approved by the Ministry of Labour. Training courses are run largely by companies, but also take place in colleges and high schools. Certificates are awarded for successful completion and fees have to be paid to the certificate giver, but certificates are not universally recognised – generally they are only valued by the brand.

³⁵³ http://gov.ro/programul-de-quvernare-2012__11a117011.html

³⁵⁴ <http://www.edu.ro/index.php/articles/18341>

³⁵⁵ <http://www.roedu.net/>

³⁵⁶ <http://www.irea.ro/en/>

³⁵⁷ <http://www.uvt.ro/ro/>

³⁵⁸ <http://www.cooperativag.ro/banat-crisana-social-institute-monographic-research/>

³⁵⁹ <http://www.die.born.de/portrait/english/index/htm>

A.8.2 Copyright in Romania

Romania is a member of the Bern Convention on Copyright. In 1997 the Romanian Copyright Office (ORDA)³⁶⁰ was established and in 1998, the Romanian Parliament ratified the latest versions of the Bern and Rome conventions.

In 2005, the Government and Parliament stiffened sanctions for copyright theft, stripped the Romanian Copyright Office (ORDA) of its law enforcement responsibilities, and **designated the General Prosecutor's Office as the national coordinator of Intellectual Property Rights (IPR) enforcement activities.**

A new change to the Copyright Law was adopted by the Chamber of Deputies at the end of 2012.³⁶¹ **The new text implements a definition of 'orphan works' but establishes a quite difficult regime for their re-use.** The new text also imposes a new levy to be paid to collective societies for public libraries and higher education libraries (only the pre-university libraries will be exempted).

In September 2008 the Creative Commons Romania version was launched with the help of **ApTI – The Association for Technology and Internet.**³⁶² This launch followed a period of prior work with iCommons, which involved the translation of licenses and their adaptation to the Romanian legal framework, a consultation period public, and finally the availability of these licenses in Romania. News about events related to CC and a non-exclusive list of projects/blogs using CC licenses may be found at **Creative Commons Romania.**³⁶³ Romania has also developed 'Licenze Libere', an internal system which follows the same labelling pattern as Creative Commons.

In education Article 22 of the **Romanian Law on Copyright and Neighbouring Rights** specifies that the educational uses of (some parts of) a work already disclosed to the public are permitted without the author's consent and without payment of remuneration, being mandatory to mention the source and the author's name if it appears on the work used.³⁶⁴ The Ministry of Education, Research, Youth and Sport has a **National Ethics Council**³⁶⁵ which monitors the use of the codes and of the Intellectual Property rights in education, analysing plagiarism cases. Some independent websites have been developed to expose cases of plagiarisms that allegedly are widespread in the Higher Education system.³⁶⁶

Co-financed with European Funds, the project 'Interuniversity virtual community for science, technology, innovation and intellectual property valorisation' (2010-2013) aims to create and develop a portal with resources and research into intellectual property. An intellectual property campaign³⁶⁷ was launched recently by the **European Patent Office.**³⁶⁸ this is a pilot project and is being developed simultaneously in four countries: Spain, Romania, Czech Republic and Turkey. The goal of the project is to raise and increase awareness on Intellectual Property, promote Intellectual Property culture and Intellectual Property management in universities and expand Intellectual Property in university curricula.

³⁶⁰ <http://www.orda.ro>

³⁶¹ see info in Romanian and comments <http://apti.ro/modificare-legislatie-drepturi-de-autor>

³⁶² <http://creativecommons.org/licenses/by-sa/3.0/ro/>, <http://wiki.creativecommons.org/Romania>

³⁶³ <http://ro.creativecommons.org>

³⁶⁴ See <http://www.legi-internet.ro/en/copyright.htm>

³⁶⁵ <http://www.ancs.ro/ro/articol/1011/despre-ancs-organizare-organe-consultative-3-consiliul-national-de-etica>

³⁶⁶ E.g. <http://integru.org> and <http://www.plagiate.ro>

³⁶⁷ http://www.osim.ro/Proprietate_Intelectuala_in_Universitati/en

³⁶⁸ <http://epo.org>

A.8.3 OER in Adult education in Romania

OER are currently largely found in schools and universities, with relatively little in VET, except for some IT courses. This mirrors the situation in most of the EU.³⁶⁹ Whilst the OER movement is very active in Romania, with a broad range of projects and initiatives,³⁷⁰ most of these have been targeted at teaching professionals, both in schools and higher education.

The **Government Programme for 2013-2016** adopted in December 2012³⁷¹ specifies that the Ministry of Information Society and the Ministry of Education will collaborate to support the innovative integration of Web2.0 and Open Educational Resources in education, to promote the use of open/free resources, and the development and sharing of resources by teachers and students, but does not mention adult and continuing education. In 2014 the Romanian Government adopted the National Strategy on Digital Agenda for Romania³⁷² that focuses on three main pillars: the modernization of the public administration, supporting the competitiveness of the private sector via ICT, and providing ICT access and digital education to the public at large, including encouragement for lifelong learning and 'the development of an attractive system of higher vocational education'.

The **Romanian Coalition for Open Educational Resources** was initiated in October 2013. The initial memorandum of understanding was signed by the members of the project 'OER Awareness Activities for Librarians and Academics in Romania' and has been signed also by private companies.

MOOC initiatives include:

- UniCampus,³⁷³ a project supported by the Ministry of Education, started in 2014 under the initiative of University Politehnica Timisoara and developed by the Association of Technical Universities from Romania³⁷⁴ to offer MOOCs on a platform based on Moodle.
- UniBuc Virtual³⁷⁵ offers three MOOCs for Teacher Training; the platform is based on Google Apps.
- University 'Vasile Goldis' Arad in partnership with Fédération Européenne des Écoles.
- Experiments for integrating MOOCs in blended academic courses can be found at University Politehnica Timisoara.³⁷⁶

Although these initiatives have not yet had a significant impact on adult education, the Romanian Institute for Adult Education³⁷⁷ is a partner in OERup!,³⁷⁸ a 2014-16 Erasmus+ project designed to identify the status of OER use in adult education institutions, raise

³⁶⁹ See http://poerup.referata.com/wiki/Overview_of_European_and_International_policies_relevant_for_the_uptake_of_OER

³⁷⁰ E.g. http://www.ecomunitate.ro/Implementarea_tehnologiei_informatiei_si_comunicatiilor_in_scoli%2817527%29.html; <http://timsoft.ro/pilot>; <http://www.slideshare.net/cami13/program-pilot>; <http://www.ecomunitate.ro/evacanta>; <http://ebc-networking.wikispaces.com>; <http://www.mcsi.ro/Minister/Comunicate-de-presa-2012/Economia-Bazata-pe-Cunoastere-ofera-profesorilor-s>; <http://ebc-networking.wikispaces.com> and others.

³⁷¹ <http://www.gov.ro/upload/articles/118981/program-de-guvernare-2013-2016.pdf>

³⁷² http://www.imdd.ro/sites/default/files/library/691-strategia_nationala_privind_agenda_digitala_pentru_romania.pdf

³⁷³ <http://unicampus.ro>

³⁷⁴ <http://rouni.ro>

³⁷⁵ <http://www.unibuc-virtual.net>

³⁷⁶ <http://www.scribd.com/doc/213864614/Integrating-MOOCs-in-Blended-Courses>

³⁷⁷ <http://www.irea.ro/en/>

³⁷⁸ <http://www.oerup.eu/the-project/>

awareness of the value of OER, create a quality framework for OER and improve the digital skills of education professionals working in adult and continuing education. At the time of writing (March 2015), the project is about to produce its first report – a needs analysis linked to the project objectives.

A.8.4 Quality for OER in Romania

At pre-university levels of the education system, the quality assurance strategy is implemented by the Romanian Agency for Quality Assurance in School Education (ARACIP).

The **Romanian Agency for Quality Assurance in Higher Education (ARACIS)**³⁷⁹ deals with QA in universities and is a full member of **ENQA**.³⁸⁰ Universities are now less strictly controlled by the Ministry. However, in neither organisation are there any references to OER, and quality assurance remains the province of individual institutions and initiatives.

A.9 Other Member States, by Paul Bacsich

As noted below, there are POERUP reports covering nine more EU Member States. We list them in order of relevance to this agenda:

1. **Ireland** – with an associated Options Brief report
2. Belgium
3. Denmark
4. Finland
5. Greece
6. Italy
7. **Netherlands** – with an associated Options Brief report
8. **Poland** – with an associated Options Brief report
9. **Portugal.**

For time and cost reasons only four of these (in bold in the above list) can be covered in this Annex – selected because they have key exemplars or raise key issues. However, added to the eight already covered this gives 12 countries, nearly half the Member States, with 'pen-picture' descriptions.

Five more Member States (Belgium, Denmark, Finland, Greece and Italy) are covered in the POERUP reports: although these reports did not specifically focus on adult education they do list several OER projects of relevance to adult education.

Brief remarks on five additional Member States (Bulgaria, Cyprus, Czech Republic, Estonia and Malta) are at the end of this section.

A.9.1 Ireland

Ireland is a small Member State, with a population of around 4.7 million. It has several long-established universities and a number of other tertiary providers, the Institutes of Technology.

Adult Education

Several tertiary providers now offer distance learning courses to adults, including Dublin City University (whose Open Education Unit now incorporates the functions of the former **National Distance Education Centre**, OSCAIL)³⁸¹ and the Institute of Technology at Sligo.

³⁷⁹ <http://www.aracis.ro/hc/en/>

³⁸⁰ <http://www.engq.eu/>

³⁸¹ <http://dcu.ie/openeducation/index.shtml>

In addition there is a private tertiary provider Hibernia College,³⁸² very active in distance learning, including for secondary teachers in Ireland and across the UK. There is also the Open College³⁸³ and various e-learning services from **SOLAS**, the Further Education and Training Authority for Ireland.³⁸⁴

The *National Forum for the Enhancement of Teaching and Learning* has since 2012 played a coordinating role in e-learning and OER for post-secondary institutions.³⁸⁵

Government policy states that 'Lifelong learning, community education and vocational training for jobseekers will be a high priority' (Bacsich, 2014).

Copyright

Irish copyright law includes a provision for 'fair dealing', similar to that used by other countries. Further, Since 2005 Government organisations, local authorities and state-sponsored bodies are obliged by law to have a permissive reuse policy for copyrighted material under the Directive on the re-use of public sector information (Bacsich, 2014).

Creative Commons has an affiliate in Ireland, hosted by University College Cork.

OER in Adult Education

The most notable provider of OER is **ALISON**, based in Galway.³⁸⁶ Launched in 2007, its core objective is to enable people to gain basic education and workplace skills, which it claims are 'standards-based and certified'. It has registered over 5 million learners.

There are now several MOOC providers including Trinity College Dublin (a member of the FutureLearn consortium), Dublin Institute of Technology and IT Sligo – but MOOCs remain a relatively small activity in Ireland, compared for example with Scotland.

The **National Digital Learning Resources** service (NDLR) is a 'free and open online community of resources designed primarily for faculty of higher education in Ireland to share their learning materials'. However, active development of this has now ceased.³⁸⁷

Quality for OER

The Irish Quality Agency for Higher Education, Quality and Qualifications Ireland (QQI),³⁸⁸ is a full member of ENQA. It recently (QQI, 2013) published a *Green Paper on the Recognition of Prior Learning*, which raised key issues relevant to OER and MOOCs.

A.9.2 Netherlands

Netherlands is a medium-size Member State, with a population of around 16 million.

Adult Education

Netherlands has a well-known Open University, active in many EU projects including for OER and MOOCs.³⁸⁹

³⁸² <http://hiberniacollege.com>

³⁸³ <http://www.theopencollege.com>

³⁸⁴ <http://www.ecollege.ie/moodle/>

³⁸⁵ <http://www.teachingandlearning.ie>

³⁸⁶ <http://alison.com>

³⁸⁷ <http://www.ndlr.ie>

³⁸⁸ <http://www.qqi.ie>

³⁸⁹ <https://www.ou.nl/web/english/home>

Copyright

The copyright law in Netherlands in respect of education is traditional.

Creative Commons has an affiliate in Netherlands, hosted by a consortium of interested parties.

OER in Adult Education

The best-known OER initiative in Netherlands was **Wikiwijs**.³⁹⁰ However, government funding for this has ceased for the schools part of the activity. The government now is more active in MOOCs for higher education.

The *Open University of the Netherlands* (OUNL) is active in OER initiatives, and the Open Education Consortium has three university members of which the leading one is the Technical University of Delft.

As regards MOOCs, the University of Groningen is a partner in FutureLearn, and three other universities are partners in Coursera. OUNL is active in MOOCs, for example via **OpenupEd**.³⁹¹

Quality for OER

Interestingly, Netherlands and Flanders share a joint quality agency for higher education, NVAO.³⁹² It is a full member of ENQA and is active in a number of projects in quality and benchmarking related to e-learning, but not specifically in OER.

A.9.3 Poland

Poland is the smallest of the large EU Member States, with a population of around 38 million. (The next largest to Poland is Romania, with just over half Poland's population.)

Adult Education

Although there is no truly national Open University (as in UK, Netherlands, Spain etc) there is a *Polish Virtual University* (hosted by two universities, in Lublin and Lodz).³⁹³ A small number of other universities offer distance education as a university priority, including Warsaw University, Warsaw University of Technology and AGH University.

In 2012 the VISCED project reported the existence of an online provider of secondary school qualifications to adults, *Szkola Online*: this continues to function.³⁹⁴

Copyright

The copyright situation in Poland in respect of education is strictly regulated.

Creative Commons has a very active affiliate in Poland, hosted jointly by a specific Foundation and a department in Warsaw University. Alek Tarkowski is the spokesperson and well known in OER and CC circles.

³⁹⁰ <http://www.wikiwijsleermiddelenplein.nl>

³⁹¹ <http://www.openuped.eu>

³⁹² <http://nvaio.com>

³⁹³ <http://www.puw.pl/pl>

³⁹⁴ <http://www.szkola-online.pl>

OER in Adult Education

The best-known OER activity in Poland is the **Digital School** programme. The programme is running until 2015 and plans to release 63 e-textbooks for 18 primary-school subjects.³⁹⁵ However, especially with the focus on primary this has very little spill-over into adult education.

The OER repository run by **AGH University** (in Krakow) is the first one established by a Polish higher education institution.

In contrast to this limited picture, there are many Open Access repositories and other, smaller and less well known OER activities such as **Panjandrum**, **Free Manuals** and **University of Orange**.

Quality for OER

The Polish Quality Agency for Higher Education, **Polish Accreditation Committee** (PKA), is a full member of ENQA.³⁹⁶ There is nothing non-trivial reported on any OER-related activities.

A.9.4 Portugal

Portugal is a medium-sized Member State, with a population of around 10 million, similar in size to Belgium, Greece, Czech Republic, Hungary and Sweden. The experience of this collection of countries is thus of particular importance.

Adult Education

Portugal has a national open university, the **Universidade Aberta**.³⁹⁷ Little other activity is well known but Hasan & Laaser³⁹⁸ report in their incisive 2010 article on **Higher Education Distance Learning in Portugal** that 'Other conventional universities and Polytechnics are starting to offer DL programmes and courses. This includes most of the engineering schools, as well schools of medicine for example, the new programmes at University of Minho and the Universities of Lisbon and Porto. ... University of Coimbra also offers DL courses in selected departments. Among the Polytechnics, Leiria, and Instituto Superior de Gestao Bancaria (ISBG) are particularly active in offering DL programmes.'

There are some virtual school activities but they seem targeted at school-age students not adults. Interestingly in their overview paper Hasan and Laaser commented on these issues (our emphasis):

'The experience with the Decree-Law of 2006 (64/2006, March) that facilitated entry of adults age 23 and over into higher education (commonly known as M23) is that of positive expansion, but so far the DL share has been limited. This may be due to the limited DL offers or because of their more stringent eligibility criteria in DL programmes. Consideration should be given to expanding eligibility to the group below age 23. Development of bridging courses (such as those developed by the Polytechnic of Leiria) could be provided on a national basis. **Online curricula to acquire the necessary qualification to enter HE for those who missed secondary school certificate could be very helpful in expanding the potential pool of DL applicants** [to universities].'

³⁹⁵ <http://creativecommons.pl/open-educational-resources-in-the-digital-school-program/>

³⁹⁶ <http://www.pka.edu.pl/en/>

³⁹⁷ <http://www.uab.pt>

³⁹⁸ <http://www.eurodl.org/?p=archives&year=2010&halfyear=2&article=414>

In particular the *Distance Learning School*, originally set up for travelling school-age students, could expand its remit.

Copyright

Copyright law has **not been modified since 2008**, but the 'educational use' clauses are reasonably broad.

Creative Commons has an affiliate in Portugal, based at the ID+ Research Institute for Design, Media and Culture, with some support earlier from a university and the Ministry.

OER in Adult Education

There is a considerable amount of relevant activity in open access and much grassroots activity in OER, providing a good base to build on for national initiatives.

The international OER and MOOC consortia are not active in Portugal: there is no member of the Open Education Consortium, Coursera or FutureLearn. However since some of these consortia are active in Brazil, there is a useful extra source of Portuguese-language open courses and resources.

The MOOC list reports a few MOOCs from Portugal institutions, in Portuguese.

Quality for OER

A3ES, the *Agency for Evaluation and Accreditation of Higher Education*, is a full member of ENQA.³⁹⁹ However there is no information on any activities in accreditation of OER.

A.9.5 Other Member States: micro-reports

Further information on five other Member States is available in a recent Eurydice report⁴⁰⁰ and from other sources. Some extracts are given below.

Bulgaria

'With the help of European funding, Bulgaria was able to put in place a number of initiatives to support distance learning in higher education. For instance, within the project 'Raising qualification of academic teachers' (2008-2011), more than 250 academic teachers were trained on the use of e-learning and distance learning methods in their specific discipline. Furthermore, a project entitled *Development of electronic forms of distance learning in higher education* is being implemented during 2013-2014.' (Eurydice p.52)

Cyprus

Cyprus has a considerable amount of distance learning. Distance learning is available from the Open University of Cyprus⁴⁰¹ and the private University of Nicosia.⁴⁰²

Cyprus has set up an approach to quality assurance for universities, the *Council of Educational Evaluation-Accreditation*, an ENQA Affiliate.⁴⁰³ Accreditation of private universities is handled by the *Evaluation Committee of Private Universities*.⁴⁰⁴

³⁹⁹ <http://www.a3es.pt/en>

⁴⁰⁰ *Modernisation of Higher Education in Europe: Access, Retention and Employability 2014*, Eurydice, May 2014, http://eacea.ec.europa.eu/education/eurydice/documents/thematic_reports/165EN.pdf

⁴⁰¹ <http://www.ouc.ac.cy/web/guest/home>

⁴⁰² <http://www.unic.ac.cy/distance-learning/programmes>

Czech Republic

'In the Czech Republic, the Strategic Plan for the Scholarly, Scientific, Research, Development, Innovation, Artistic and Other Creative Activities of Higher Education Institutions for 2011-2015 includes an objective to diversify the modes of study and educational methods in close connection to the needs of different categories of students. In this context, and within the Institutional Plans of Development of Higher Education Institutions, the Ministry shall support project-oriented education, e-learning, blended learning that should, among other things, serve the needs of specific target groups of students (*already employed adult learners*, individuals with physical or social disadvantages). Higher education institutions are eligible to receive financial support for these developments.' (Eurydice p.52)

Estonia

'In Estonia, the Ministry of Education has supported e-learning through the programme called *Best 2008-2013* covering 20 higher education institutions. In addition to this initiative, the Innovation Centre for Digital Education Initiatives coordinates and facilitates activities and developments in the field of ICT-supported learning. Its activities include the coordination of the Estonian e-University consortium for the higher education sector.' (Eurydice p.52)

Malta

Malta appears to have little OER or MOOCs – and apparently few distance learning students. It has only recently set up its quality assurance system for tertiary education, the *National Commission for Further and Higher Education* (NCFHE),⁴⁰⁵ and so is expected to have a modern approach to quality procedures.

A.10 The wider European and global context, by Paul Bacsich

This chapter covers a few additional countries, in particular Norway, US and Canada. It does not provide an overview for each country – rather it makes a number of key points to be drawn on later.

A.10.1 Norway

We feel that because of the high degree of coupling between Norwegian adult learning and OER activities and those in other parts of Scandinavia, it is wise to analyse Norway also.

Norway is a Scandinavian country outside the European Union but adjacent to Sweden. It has a population of just over 5 million. Being in the Schengen Zone it shares free movement with the other Nordic countries (and most members of the EU) but has its own customs rules. There is a considerable degree of intelligibility between Norwegian (both versions), Swedish and Danish. Indeed,⁴⁰⁶

'Generally, speakers of the three largest Scandinavian languages (Danish, Norwegian and Swedish) can read each other's languages without great difficulty. This holds especially true of Danish and Norwegian. The primary obstacles to mutual comprehension are

⁴⁰³ <http://www.highereducation.ac.cy/en/council-educational-evaluation-accreditation.html> – and <http://www.enqa.eu/index.php/enqa-agencies/affiliates/>

⁴⁰⁴ <http://www.ecpu.ac.cy/en/index.html>

⁴⁰⁵ <http://www.ncfhe.org.mt/content/home-about-us/1343488/>

⁴⁰⁶ http://en.wikipedia.org/wiki/Comparison_of_Norwegian_Bokm%C3%A5l_and_Standard_Danish and <http://www.listlanguage.com/swedish-written-language.html>

differences in pronunciation. Danish speakers generally do not understand Norwegian as well as the extremely similar written norms would lead one to expect. Many Norwegians – especially in northern and western Norway – also have problems understanding Danish, but according to a recent scientific investigation Norwegians are better at understanding **both Danish and Swedish than Danes and Swedes are at understanding Norwegian.**⁴⁰⁷

Although there appears to be little interworking at the ministry level between Nordic countries on OER and MOOCs the free movement and language compatibility have brought about a considerable amount of informal collaboration, such as NordicOER.⁴⁰⁷

Adult Education

There is a strong tradition of adult education in Norway, originating in correspondence schools.

NKI Fjernundervisning is a Norwegian correspondence school, established in 1959 near Oslo. It offers postal and Internet studies in courses ranging from upper secondary school to university college studies, and post-graduate studies. It claims to be **Scandinavia's largest provider of online education, offering flexible online education** within a wide range of disciplines in partnership with recognised colleges and universities, to around 10,000 students.⁴⁰⁸ Teaching is mostly in Norwegian. Since 2007 NKI has been part of the company Anthon B Nilsen.⁴⁰⁹

NKS Nettstudier was founded even earlier, in 1914.⁴¹⁰ It offers college studies and vocational education on the internet. It is now part of the Foundation School Campus Kristiania. This has 4,500 full-time students, plus the students in online learning. The school, with campuses in Oslo, Bergen and Trondheim, offers 15 college studies units, 18 Bachelors degree programmes and 2 Masters programmes.⁴¹¹

Continuing the cycle of innovation, **Campus Nooa** was started in 2012 by Professor Morten Flate Paulsen who was earlier central to the development of NKI Nettstudier. It offers secondary school courses and a variety of management and other courses, some in English.⁴¹² Narrative information in English about this is scanty but there is a useful presentation in English.⁴¹³

Other large providers of distance education include BI (Norwegian Business School)⁴¹⁴ and Sør-Trøndelag University College

In contrast, some aspects of Norwegian adult education are very 'presential'. Norway is an active member of the *Folk High Schools* movement,⁴¹⁵ which in conjunction with *Folk Universities*, are found in Nordic countries, Germany and Austria. These have a strong focus on residential teaching.

Vox is the **Norwegian Agency for Lifelong Learning** and is part of the Norwegian Ministry of Education and Research. It promotes access and participation in formal, non-formal and informal adult through research, basic skills, integration, career guidance and programmes and subsidies.

⁴⁰⁷ <http://nordicoer.org>

⁴⁰⁸ <http://www.nki.no/nettstudier/nki-nettstudier-scandinavia-s-largest-provider-of-online-education>

⁴⁰⁹ <http://www.abn.no/index.php/en/utdanning>

⁴¹⁰ <https://www.nks.no>

⁴¹¹ http://no.wikipedia.org/wiki/Campus_Kristiania

⁴¹² <http://campus.nooa.info/?lang=en>

⁴¹³ <http://www.slideshare.net/CampusNooA/campus-nooa>

⁴¹⁴ <http://www.bi.edu>

⁴¹⁵ http://en.wikipedia.org/wiki/Folk_high_school

Copyright

Norway has a Creative Commons affiliate, set up in 2004.⁴¹⁶

OER in Adult Education

Norway has a number of OER initiatives of which the best known is perhaps the **Norwegian National Digital Learning Arena**. **It is a joint initiative between county councils** in Norway that allocates a portion of state funds to ensure free access to textbooks for Norwegian students and to develop digital resources (or purchase from publishers or other producers. The project has produced a large amount of OER and there are many **thousand resources available from the portal**.⁴¹⁷

However, despite the high level of activity in online learning, on the whole OER is not very prevalent in distance education in Norway. This is the case for MOOCs also. In contrast, in the policy area there is a useful government report on MOOCs,⁴¹⁸ and several Nordic experts on online education prepared the *Kragerø Open Online Education Declaration* in June 2014.⁴¹⁹

Quality for OER

The Norwegian Agency for Quality Assurance in Education (NOKUT) is an independent government agency that contributes towards quality assurance and enhancement in both higher education and tertiary vocational education.⁴²⁰ It is a full member of ENOA. In its recent (2013) self-reflection on its activities there was no mention of OER or MOOCs and very little on e-learning,⁴²¹ but the report did note that certain aspects of flexible learning had been under study, for example flexible professional education⁴²² and other clues on the NOKUT site suggest that NOKUT is keeping such aspects under review.

A.10.2 United States

Out of the many thousands of OER and MOOC initiatives known in the US, and the hundred or more documented and mapped by POERUP,⁴²³ we single out two for particular mention.

Common Core State Standards for K-12

The Common Core State Standards were developed by a consortium of US states to produce specific goals for language, literacy and mathematics, that students should reach at each grade level (year) in secondary school. The SharedOER case study⁴²⁴ reported that **'October 2014, 43 US states had voluntarily adopted and were working to implement**

⁴¹⁶ <https://wiki.creativecommons.org/Norway>

⁴¹⁷ <http://poerup.referata.com/wiki/Norway>

⁴¹⁸ https://www.regjeringen.no/globalassets/upload/kd/time_for_moocs.pdf

⁴¹⁹ <http://www.nooa.no/kragero-open-online-education-declaration/>

⁴²⁰ <http://www.nokut.no>

⁴²¹

http://www.nokut.no/Documents/NOKUT/Artikkelbibliotek/Generell/Strategi/2013/ENOA%20Review%20of%20NOKUT%20selfevaluation%20Report_February%202013.pdf

⁴²² <http://www.nokut.no/en/Facts-and-statistics/Publications/Research-and-analyses/Education-in-Norway/Quality-challenges-in-flexible-professional-education/>

⁴²³ http://poerup.referata.com/wiki/United_States and

http://www.poerup.org.uk/mapCountry/?csrf_token=1428429155.73%23%23bb5bf2c26d744558f5550aa5a56d65575ef27f98&code=US

⁴²⁴ *The Common Core State Standards Initiative and its impact on OER*,

http://poerup.referata.com/wiki/The_Common_Core_State_Standards_Initiative_and_its_impact_on_OER

the Common Core State Standards'. All this is happening in a country where by law there can be no federally-imposed school curriculum.

'The first major cross-border OER initiative, the K-12 OER Collaborative, was launched in November 2014 at the Open Education Conference. At that time a formal Request for Proposals (RFP) was issued to move forward with the Collaborative's primary goal: to create a comprehensive, openly licensed curriculum aligned to Common Core State Standards.' (ibid)

There are many lessons for Europe in this initiative. These Standards can of course equally well be used in virtual schools for adults.

Community College TAACCCT

Creative Commons reported in 2015:⁴²⁵

'Starting with the first round of grants in 2011 Creative Commons and a team of partners have been actively supporting US Department of Labor (DOL), Trade Adjustment Assistance Community College and Career Training (TAACCCT) grantees. This multi-year, nearly \$2 billion grant program provides funds to US community colleges who in partnership with industry, employers, and public workforce systems create stackable/latticed credentials that can be completed in two years or less. The goal of TAACCCT is to expand targeted training programs for unemployed workers, especially those impacted by foreign trade and to move unemployed workers into high wage, high skill jobs in high growth industry sectors.

There are many unique aspects to the TAACCCT program. Creative Commons involvement stems from the DOL requirement that grantees allow broad access for others to use and enhance project products and offerings by licensing newly developed materials produced with grant funds with a Creative Commons Attribution License (CC BY). DOL is the first US department to require this in such a large grant program. Its size makes TAACCCT the largest Open Educational Resources (OER) initiative in the world.'

It has taken some time to achieve much content since the original launch of TAACCCT in 2009 and the first grants in 2011, but now OER material can be viewed for aerospace, energy, health science and many other workforce-related subjects.⁴²⁶

A.10.3 Canada

Canada has an overall population of 35 million but is a federal nation divided into ten provinces (and three territories), fully autonomous in educational matters. The provinces range in population from Ontario (over 12 million) to four under 1 million including two under 500,000. This, along with Quebec as a French-speaking province, gives many points of contact with EU issues, and as such, Canada is often studied for its relevance to EU OER matters, including most recently by POERUP and eMundus.⁴²⁷

Adult Education

There is no truly national open university, but *Athabasca University*, based in Alberta, comes the closest.⁴²⁸ It is active in OER and also MOOCs – indeed many say that the concept of MOOC was developed there, or at least nearby in Canada.⁴²⁹

⁴²⁵ <http://creativecommons.org/tag/taaccct>

⁴²⁶ <http://profiles.open4us.org/taaccct/>

⁴²⁷ <http://poerup.referata.com/wiki/Canada> and
http://poerup.referata.com/wiki/Options_Brief_Pack_for_Canada;
http://wikieducator.org/Emundus/Country_overviews_of_open_education#Canada

⁴²⁸ <http://www.athabascau.ca>

There are several universities in other provinces also active in distance education, including:

- Thompson Rivers University, British Columbia
- Royal Roads University, British Columbia
- Memorial University, Newfoundland and Labrador
- Those and others in the Canadian Virtual University.

Canadian universities are also very active in the **OER university**.⁴³⁰

OER

The *Policies Overview* for Canada observes that:⁴³¹

'The most important development in Canada for the open movement in 2014 was the tri-province Memorandum of Understanding on Open Educational Resources. The three western provinces of Alberta, British Columbia and Saskatchewan have agreed to 'cooperate on the development of common OER'. This includes facilitating cooperation among the provinces in sharing and developing OER; identifying, sharing and encouraging the use of OER; and by using technology, foster an understanding of OER issues.'

Related to this, but separate, was the success of the British Columbia Open Textbook project for college and university students. A *Project Update* of 2014 notes:⁴³²

'October 2014 marked the 2 year anniversary of the BC Open Textbook Project. As of October, 2014, we are very close to meeting the original target of the project. Of the top 40 subjects, we have found or created textbooks that align with 38 of them, with multiple textbooks for many of the areas available in our collection. The remaining two, *Canadian History* and *Criminology*, are being developed and will be released in 2015.

In addition to the Canadian History and Criminology books, we have also created two other books from scratch for the first phase of the project: a second year English Literature textbook, and a regional Geography textbook, and have adapted eight existing open textbooks to meet the needs of British Columbia faculty. In total, the BC Open Textbook Collection contains over 70 openly licensed textbooks.'

A.10.4 Other non-EU countries

From POERUP it is clear that interesting developments are also taking place in **Brazil** and **Mexico**, of potential relevance because of their use of EU languages; but space does not permit their analysis here.

There are also international activities linking US experience in adult education to developments in **India**. The US organisation Progia LLC is focused on India especially in the use of OER for faculty development and creating skills development courses for NIESBUD, part of the India Ministry for SMEs.⁴³³ Progia has conducted workshops at over 15 universities/colleges in India,⁴³⁴ and has also created some OER-based courses which **NIESBUD** is offering to its students through its e-learning platform.

⁴²⁹ http://en.wikipedia.org/wiki/Massive_open_online_course

⁴³⁰ <http://oeru.org/oeru-partners/>

⁴³¹

http://poerup.referata.com/wiki/Overview_of_Open_Educational_Resources_Policies_in_Canadian_Institutions_and_Governments#Western_Canada

⁴³² <http://open.bccampus.ca/about-2/>

⁴³³ <http://niesbud.nic.in>

⁴³⁴ <http://niesbud.nic.in/Workshop-on-Creating-Skill-Development-Courses-using-OER.htm>

REFERENCES

All references in this Annex are self-contained: they are found in the footnotes.

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