May 2020

Excerpt: Open Education Survey

SPARC
Europe

3.7 Challenges and Opportunities

Among the final questions of the survey were three free-text prompts to provide respondents with the chance to share more information: one question invited respondents to list their top three key challenges in supporting Open Education, one sought the top three opportunities or benefits, and the last question asked for any further comments. Sixty-two respondents filled out these three free-text sections. Some of the responses were a single word, while others wrote complete paragraphs with links to further resources. Responses in quotation marks are direct transcriptions.[1] Responses have not been standardized for English grammar.

In addition to Policy, four larger themes emerged from the responses: People; Resources; Culture and Environment; and Quality, Access, and Reuse. Many of the topics were mentioned in both the challenges and the opportunities questions, which may reflect the different stages of respondents on their institutional journeys with OER: if an institution does not have a policy, then respondents may be focused on developing one; however, if an institution already has a policy, then respondents are more likely to be working on implementation. This may impact their considerations of any individual topic as a challenge or benefit.

Across four of the themes—all but Quality, Access, and Reuse—the challenges outweighed the opportunities and benefits. The total number of instances across all responses is 377, which is composed of 214 challenges and 163 opportunities or benefits. The total for each theme is listed in the first line of the section. Numbers in parentheses indicate the total number of instances of the topics in the challenges and opportunities sections, respectively.

Due to the nature of qualitative analysis, many of the responses have been coded to multiple themes, so the total number of responses for all of the themes is larger than the number of individual responses. All responses are available in the accompanying dataset, along with a list of individual codes. If a topic has been mentioned in the "any further comments" area of the survey, it has been discussed within the associated topic section.

We have sought to summarise these responses, but refer to them verbatim as much as possible due to the rich information they provide.

3.7.1 Policy

In terms of policy development (16 total instances: 12 challenges, 4 opportunities), the 12 institutions that cited it as a challenge reported difficulties on two levels: institutional and national. On the local level, respondents reported a "lack of cohesive organizational policy", "lack of policies for the development and use of OER at institutional level", "no official policy yet", and "work in collaboration with university stakeholders to achieve an OE policy".

The second level of challenges mentioned "national policy still under construction" and "lack of Open Education and Open Science Policies at national level".

On the other hand, those respondents who considered policy to be an opportunity already have "approved institutional policies" and are part of a "Library [which] is engaged with the national development of policies". As the field matures, more and more libraries will reap the benefits of having the backing of the organisational and national policies that they are currently working on.

3.7.2 People

The main groups of people (92: 51 challenges, 41 opportunities) mentioned by respondents were teaching staff, students, library staff, and external partners. For teaching and library staff, there were more challenges than benefits mentioned, but respondents saw more opportunities and benefits with students and external partners.

Teaching staff (45: 29 challenges, 16 opportunities)

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[1] All responses that have been translated appear in their original language in footnotes.

Within the challenges, the overwhelming majority of respondents were concerned with difficulties in influencing teaching staff: "engagement with academic/teaching staff", "lack of awareness of OER amongst faculty", "reaching all teaching staff", "engage teachers [to] create OER", "convince to teachers", "willingness of teachers", "frame to collaborate with academic units", and "having OER on the agenda when creating new learning materials".

Other areas mentioned included "lack of motivational infrastructure (i.e. policies, promotion among academic staff is geared almost exclusively to research outputs)", "fears of low recognition", "no contracts between teachers and university", and "teachers do not have time to enhance open education".

From the opportunities section, respondents saw benefits in "cooperation with teaching staff of the university", "expanding active participation to resource creation by faculty", "integration in learning and teaching", "saving the work time of teachers", "engagement with teaching staff", "Improving teaching", "to increase OER use in virtual classroom", and "working towards the insertion of libraries' teaching activities within the academic structure".

Students (12: 2 challenges, 10 opportunities)

The only challenge listed was a lack of awareness among students (by two respondents).

The clear beneficiaries of OER are the students, which is reflected in the number of positive responses: "encourage students to participate in the social networking environments that have been created around OER repositories", "better learning results and possibility for flexible studying", "student driven learning", "provides a resource for students that supports learning and collaboration", "broadening access chances for students", "financial benefits for students", and even "engaging students in open practice through the creation of open content".

A highly relevant benefit for readers of this report is that the "library has constant connection with all students".

Library staff (12: 11 challenges, one opportunity)

All but one of the respondents who mentioned library staff considered it a challenge: "lack of staff and time", "not enough staff", "staff levels", and "need for more staff members dedicated to working on supporting Open Education". A specific challenge related to library staff recruitment was "job creation with the right skill set".

The only organization that considered library staff as a benefit declared "we now have an open scholarship librarian". In one of the free-text responses, a respondent reported having several colleagues "involved in creating and distributing OER", with one person who is responsible for the institutional OER policy.

External partners (23: 9 challenges, 14 opportunities)

Outside the institution, respondents had a more positive perspective on collaboration with external partners.

The challenges reported by respondents related to a lack of national policies, along with "increase collaboration with other OER libraries". Wider challenges included the need to "encourage Open Science in the entire Science community" and "project the importance of Citizen Science in Research Units in order to involve the community".

For respondents based in countries with a more developed OER infrastructure, library engagement with the national development of policies was reported as a benefit. Other benefits included "cooperation with relevant bodies outside the library", "facilitate academic initiatives on open knowledge (such as Wikipedia)", "international cooperation", and simply, "community".

Many respondents were also enthusiastic about "possibilities for collaboration in scientific communities" to "share best practices in OE". Individual partners mentioned include National Forum for Teaching and Learning (Ireland), National Agency for Education (Finland), SURF and VSNU (the Netherlands), REBIUN (Spain), EUTOPIA (Erasmus +), MERLOT.org (USA), SPARC, and other universities.

3.7.3   Resources

The kinds of resources (86: 60 challenges, 26 opportunities) mentioned by respondents can be broadly grouped into financial, technical, materials, and library skills (which is distinct from "library staff" above). In three of the four topics, there were more challenges than opportunities listed, with Materials being evenly split between challenges and benefits.

Financial (28: 16 challenges, 12 opportunities)

Since OE is a developing area across Europe and OER are often cost-neutral to the end user, various resources are required to create them which may result in the financial concerns that preoccupied a number of respondents. Many simply wrote "lack of funding", "lack of money", "budget", or "funding" in the challenge section. Other budgetary challenges included "funding for the development of collections" and "funding support services".

Conversely, some respondents highlighted the monetary benefits to readers as opportunities: "low cost", "OER can offer savings in the cost of materials", "cutting expenses", "reducing library spend on subscriptions", "ability to offer alternative study materials taking into consideration that budget is very limited", and "to descend the total cost of some subjects and programs".

Benefits were also noted with regard to staff and OER: "financial benefits as teachers can learn from each other and share resources □ no duplicate work" and "funding opportunities for innovative teaching" was an opportunity based on a national initiative by Ireland's National Forum for Teaching and Learning.

Technical (19: 18 challenges, 1 opportunity)

Technical challenges included a need for developing better infrastructure, tools and platforms, tech support, and "technology" in general. Detailed challenges included "building interactive or playful online OER materials", "implementation of contextualized attention metadata in combination with profiles of interest", and "lack of understanding and confidence in relation to skills for co-creation technologies".

A compound regret related to technical aspects of OER expressed by one respondent was "prior lack of innovation or attention to following national/international trends means a) we're behind the curve, b) don't have in-house expertise, and c) don't have services or support in place".

The only institution to mention technology as an opportunity or benefit cited "optimizing documentary support for academic activities on OA and spread open education platforms through reading lists".

In the free-text section, one respondent mentioned "The Ministry of Education and Culture and the Finnish National Agency for Education are developing a national service for open educational resources (aoe.fi). It is intended for all levels of education. […] Once the service will open, it will be easier to promote for the university management and teachers the use OERs and publishing of their own teaching materials and courses openly".

Another free-text section declared that the "biggest part of OER is video (around 79%), techniques like elastic search, speech to text, etc., will help in better searchability of this kind of materials. Maybe an idea to pay attention as well".

Materials (12: 6 challenges, 6 opportunities)

While the responses were evenly split between challenges and opportunities, the main sentiment for the challenge was "lack of resources" and "providing resources", including "sharing open educational material which is already available".

Equally, the benefits included "expansion of collection" and "expand the range of resources that we provide".

One respondent mentioned "We answered this survey taking into account that the MOOCs are OER" in the free-text box. This particular institution offers more than 30 MOOCs, and some of the material is available outside the timeframe of a given course instance; however, there is no licensing information on the material, so it is not technically within the definition of OER governing this survey.

Library skills (27: 20 challenges, 7 opportunities)

The vast majority of respondents suffered from a lack of skills: "lack of understanding and confidence", "not enough skills", "improve the open science knowledge and skills of library staff",[2] "getting staff properly training and knowledge about OE", "professionalisation of support", and "number of skilled staff members in the library".

Among the opportunities mentioned were "new skills development in libraries", "knowledge on repositories and metadata", "public engagement", "knowledge exchange", and "library staff have and can share their knowledge to academic staff related to creating, long-term preservation, and access education materials".

In the free-text box, one respondent reported that there are no longer postgraduate librarianship qualifications in their country: "This is currently an obstacle. It's not just important to have highly trained librarians/information specialists who have an overview of our own collections – it's also important for them to have an eye on external collections (OER repositories, for example) in order to offer advice or develop services involving retrieval, use, etc. of those resources. OER literacy."

3.7.4   Culture and environment

The culture and environment theme (109: 65 challenges, 44 opportunities) comprises changing culture, institutional leadership, library leadership, advocacy, and cooperation between services. This theme has the highest number of instances of all of the themes, which demonstrates that organisational concerns are significant for the majority of survey respondents. In two of the topics—institutional leadership and advocacy—the challenges far outweighed the opportunities; however, in library leadership, there were zero challenges reported. The other two topics were both balanced evenly between challenges and benefits.

Changing culture (11: 5 challenges, 6 opportunities)

Changing the culture among teaching staff and students was seen as both a challenge and an opportunity. Some respondents felt the "open and sharing culture is developing very slowly", and others were challenged by "changing teaching and learning environments", "changing institutional culture to develop a system of incentive, including reward and recognition in learning and teaching", and "to change the mindset of academics".

Conversely, other respondents saw "the culture of openness", "better organisation and to be ready to change the way of teaching-learning", and "to have changed a little bit the behaviour (as for designing courses) of some teachers" as benefits.

Institutional leadership (22: 18 challenges, 4 opportunities)

The low number of institutional OER policies is reflected in the high number of respondents who cited a lack of an institutional leadership as a challenge: "institutional policy to support Open Education", "lack of university's initiative to cooperate and involve the library", and "in our university, no one is interested in open resources, in an organizational sense, although many employees and students use them".

"Convincing" and "encouraging" the board, the faculties, the organisation, and university authorities about "the benefits of OER" and that "OE is a good choice", and "to create a team creating open educational resources" appeared in a number of responses as a challenge.

Another angle on the lack of institutional leadership was the challenge that can arise from ambiguity around Open Science: "not enough organizational support. Open Science efforts focus on open publishing and education is neglected".

In contrast, one respondent reported an opportunity regarding the "emphasis locally on openness in scholarship (i.e. 'Open' as part of four values of new University strategy)".

Other opportunities cited include "approved institutional policies", "Open Science Policy", and "strategy", which demonstrates how important it is that an institution have a policy on OER to turn institutional

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[2] Original: "mejorar los conocimientos y habilidades en ciencia abierta del personal bibliotecario"

leadership into an opportunity rather than a challenge. No respondents mentioned "task forces" in either the challenges or opportunities.

Library leadership (17: zero challenges, 17 opportunities)

In direct contrast to the "Institutional leadership" section, none of the respondents who referred to leadership in a library context did so in the challenges section: everyone considered library leadership to be a benefit or opportunity.

The responses in this section were encouraging for the enterprise of OER: "The Open Education Initiative helps to complete one of the library's basic missions: knowledge for everybody anywhere and anytime". Other positive examples of library leadership include: "rise of the importance of the library", "OER are in line with our open access / open science agenda of the library", "demonstrating leadership and innovation by using OERs", "positioning the Library as the home of open scholarship at the institution", "take a leading role in the university", and "greater visibility for the library".

Interestingly, the three institutions who brought up the topic in the free text section were all struggling with their role in relation to OER:

- "Open Education is not something the library discusses or has the capacity to support within the organisation, it may be happening within academic departments; however, the library staff have no awareness of this"

- "Our main OER activity is outside of the Library, it would be great to have the library more involved"

- "We cannot say that we lead the development of Open Education in our institution and more broadly, but we do all the best what we can with resources available to us, to pave the way for Open Education"

It is important for individual librarians not to feel isolated in their efforts. One respondent noted "This survey was really helpful for seeing what specifically is missing from our services, organization, etc. and for inspiring new ideas", which is encouraging.

Advocacy (35: 30 challenges, 5 opportunities)

Raising awareness and increasing engagement with teaching staff and sometimes the overall institution was a prominent issue for many respondents. Along with the common "raising awareness of existing resources", "promotion", and "disseminating information about OER", one person saw "creating a sense of urgency for OE" as a challenge, which is in line with "convincing potential participants to dedicate time and effort to stuff that they see beneficial only to an institution that is not perceived as particularly rewarding".

Other responses for the challenges of advocacy sought "more research on added value of OER, and impact on learning", "breaking established patterns of thought", and "how to promote open education materials among professors so that they would be ready to use it in their teaching".

Similar comments were recorded as opportunities by other institutions: "raising awareness of the scientific community" and "promoting open practice within the university".

Cooperation within the institution (24: 12 challenges, 12 opportunities)

Working with other services and departments within the same institution was seen equally as both a challenge and an opportunity by different respondents.

Challenges encountered were "lack of overview of the organization structure", "lack of communication between system and tool developers and educators", "getting all involved parties on the same page", and "frame to collaborate with academic units". Other challenges were "recognition of scholar community needs", and the domino effect that "librarians should work more closely with learning technologists who work with faculty to create OERs".

The benefits included the chance for the library to "deepen cooperation with teachers" and "expand active participation to resource creation by faculty". The most common parties that respondents targeted for

collaboration were teaching and education staff members, but they also mentioned learning technologists, repository staff, the "teacher training academy", and "the different agents of OER in our university".

3.7.5 Quality, access, and reuse

The final theme of quality, access, and reuse (74: 26 challenges, 48 opportunities) comprises copyright and licencing, sharing and reuse, discoverability, accessibility, and quality. Benefits and opportunities outweigh the challenges in four of the five topics in this theme, which is unlike any of the other themes in this survey.

Copyright and licencing (14: 8 challenges, 6 opportunities)

Copyright and licencing is the only topic that had more challenges than opportunities in this theme. Different institutions saw copyright and licencing as both an opportunity and a challenge for the same reasons. Some cited the challenges of a "lack of understanding and confidence in relation to skills for co-creating: technologies, licensing" and that "teachers are hesitant to share their work because they are afraid of copyright infringement". Most of the respondents wrote much shorter answers, including "licencing", "copyright and legal issues", "dealing with copyright restrictions", and "knowledge about copyright".

The costs of copyright came up a few times on both sides, but there was very little contextual information: "awareness of copyright costs" was a challenge, and "cutting copyright costs" was an opportunity. It may be the case that "awareness of copyright costs" relates to the challenge of increasing awareness of copyright costs with teaching staff which might have the effect of galvanising them to adopt and create OER; however, given the brevity of the responses, it is not possible to speculate without further qualitative investigation.

With regard to opportunities, one institution is "an obvious partner when it comes to copyright and licensing", while another has "faculty [who] are aware of licensing models that they can later transfer to other activities, e.g. publishing".

Sharing and reuse (15: 5 challenges, 10 opportunities)

Among the challenges for sharing and reuse were "international collaboration in sharing OER, connecting repository/interoperability of OER" and "share best practices in OE". In another context, these might be considered opportunities; however, the participants both chose to enter them as challenges (and had different answers in the opportunities fields), so their choices are definitive, if not entirely transparent.

The majority of responses involving sharing were presented as opportunities, with a wide range of potential beneficiaries mentioned: "sharing OER on information literacy with our colleagues in our country" and "I can share with others (family, friends)".

Respondents are also confident that "I can share it with others without fear about legal aspects", along with "better shareability", "legal reuse of third party materials", "time/cost saving due to sharing/reuse of material", and "reuse of learning and teaching materials".

Discoverability (12; 3 challenges, 9 opportunities)

The main challenges of discoverability were "get more visibility to the collection of OER learning objects in the repository" and "improve visibility and impact"[3].

Discovery and visibility were mentioned mostly in an opportunity context, such as "easy to find", "to have better visibility and positioning",[4] "raising the profile of [the institution's] research-based teaching", "making some OERs findable internally", and simply "visibility" (twice).

Accessibility (18: 6 challenges, 12 opportunities)

The challenges associated with accessibility, such as "delivery", "distribution", "usability", "availability", and "improve accessibility to knowledge"[5], were directly countered by the opportunities, including

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[3] Original: "mejorar la visibilidad e impacto".
[4] Original: "tener mayor visibilidad y posicionamiento"
[5] Original: "mejorar la accesibilidad al conocimiento"

"improved accessibility of content for students", "to eliminate barriers to high quality education", and "broadening access chances for students". As with some of the other issues brought up in the survey, this may be attributable to the institution's stage on the OER journey—accessibility can be challenging until it is addressed appropriately, after which point it becomes a benefit.

Several respondents went beyond student bodies to consider benefits for wider user groups as well: "free access to full text for every one", "many users can benefit from their easy access to knowledge", "better access to educational resources", "no barrier restrictions", "access to current scientific information", and "more information diffusion".

Quality (15: 4 challenges, 11 opportunities)

Only one third of respondents who mentioned quality thought it was a challenging issue: "persuading parties about quality of resources", "quality assurance", "access to high quality, relevant teaching and learning materials", and "finding suitable study materials for open education".

The most comprehensive comment regarding quality was "the culture of learning will open up and equality in the society will increase as university teaching resources will be open for all public. Open Education improves the continuing education of professionals and benefits the whole society when professionals have up-to-date knowledge".

Another participant was confident that "open education will increase the quality of education as education is open for public reviewing in the same way as research publications are". Reinforcing that perspective included "improving quality of resources", "overall uniformity in educational standards at all [specialist institutions] due to sharing/reuse of material", "high quality material already available OER", "up to date content, especially via Open Textbooks, when scientific domain is changing rapidly", "more validated information, better science", and "rise of students' knowledge on information literacy and access to quality materials". Finally, through OER, "everyone in the world should have access to high-quality educational experiences and resources".