



European Network for Catalysing  
Open Resources in Education

# OER Policies and Strategies in European Higher Education

**Stefania Aceto**, Universidad Internacional de La Rioja (UNIR)

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# Our aim & method

- Identify and study a set of significant OER strategic initiatives by EU HEs and/or their ecosystem
- Analyse challenges and implications
- Provide recommendations for effective policies and strategies
- Call for contributions
- Desk research
- Interviews

# Case studies

- ❑ OER policy at the University of Edinburgh, Scotland
- ❑ Open Learn at The Open University, UK
- ❑ OER Portal, France
- ❑ MOOQ
- ❑ Kallipos: Greek Open Textbooks, Greece
- ❑ Edusources, The Netherlands
- ❑ Open Press University of Galway, Ireland

# An overview

Case study	Main features
<b>OER Policy @ the University of Edinburgh</b>	OE resources policy to support OER use, reuse, creation and sharing by students and staff. Inclusion, Digital skills, Open Scotland.
<b>OpenLearn @The Open University UK</b>	Platform launched to break down barriers to access and provide students with free resources. Discoverability, accessibility, inclusion, recognition.
<b>NUI Galway Open Press</b>	Initially convened by an informal group of libraries on OER, it has now evolved into the NUI Galway Open press, producing and editing web books that can be published with open licence.
<b>OER Portal</b>	A French portal providing access to the Open content produced by 8 digital universities (Universite Numerique) in France for undergraduate and HE students and professors.
<b>Kallipos</b>	This initiative aims to offer open e-textbooks for Greek HE students available in open repositories
<b>MOOQ</b>	Initiative launched by the European Alliance for Quality of MOOCs with the objective to improve the quality of online learning. It produced the QRF for MOOCs
<b>Edusources</b>	OER platform for Dutch HE allowing teachers and students to find and use OER

# Main OER policy features

	Rationale and target	Impact	Sustainability model	Challenges
<b>OER policy University of Edinburgh</b>	OER use and creation by students and staff; OER accessibility SDG 4  Students and teachers	Inclusion (Commons resource project) Digital skills Open research Open assessment Open Edu Scotland	Internal funding	Copyright debt
<b>Open Learn The Open University UK</b>	Free learning Badges Improve discoverability and accessibility of OER  Students	Access Inclusion	Internal and external funding Public and private	OER for consumption, not for exchange
<b>NUI Galway Open Press</b>	Started as bottom up initiative and evolved into Open Press (content published under Open licence)	Capacity building in creating, promoting and publishing open content	Internal funding	Tech development Political endorsement Funding

# Main OER policy features

	Rationale and target	Impact	Sustainability model	Challenges
<b>OER Portal</b>	Single entry point for access to OER of digital HEIs  Students	Access Knowledge base	Donations and public funding	Portal management
<b>Kallipos</b>	Open textbooks for students Platform for exchange  Students, teachers, experts	Exchange platform for teachers and experts	Funded by the MoE	Incoherent policy framework
<b>MOOQ</b>	Improve the quality of MOOCs  Designers, Facilitators and providers	10k stakeholders engaged in QRF	EC funding, now voluntary contributions	MOOC per se
<b>Edusources</b>	National platform for open learning material  Students and teachers	A variety of SH involved: students, teachers, HEIs, libraries	Communities	Quality Widening the DB Community support



# Emerging issues

- **Key role of partnerships to secure meaningful impact:** multi-actor (public/private; education providers/quality agencies; national/international, different education levels).
- **Variety of focus:** Improving access, enhancing discoverability, improving quality; building capacity in the use, reuse, creation, promotion, publication of OER; engagement of students and staff.
- **Target:** students and teachers in the first place, but also experts, designers, facilitators and providers of OER.
- **Impact:** institutional/national/international; inclusion; digital skills; capacity building; improving quality and access; community building. The more mature and the more endorsed the policy, the wider the impact.

# Emerging Issues 2/2

- **Sustainability:** funding, donations (towards alliances and communities)
- **Challenges:**
  - Access and quality
  - Time, effort, skills and costs
  - OER discoverability
  - Institutional and political support
  - Sustainability



# Recommendations

- *Get for free vs Get&give*
- Incorporate OE policies and strategies in the wider innovation strategies related to HE
- Ensure coherence among ongoing educational policies
- Strengthen & enlarge partnerships
- Enhance the social role of OE
- Enhance the growth of communities as a key lever for sustainability and innovation



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## Website

For further and updated information  
about this project please see:

**[www.encoreproject.eu](http://www.encoreproject.eu)**

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## Project partners:



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DISTANCE EDUCATION



Fondazione  
Politecnica  
di Milano





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# Policy session at Encore Final Conference

Orna Farrell, Stefania Aceto, Alan Masson

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# Session plan

What	Details	Who	Time
Overview of policy landscape	State of play in OER Policy	Orna	20 mins
OER in HE	Case studies of institutional experiences of OER	Stefania	20 mins
OER in Business	Case studies of Open in business	Orna	20 mins
	Canvas experience of integrating open into their business	Alan	20mins
Q&A and reflections where next	Where is the OER policy landscape going?	Orna and Stefania	20 mins

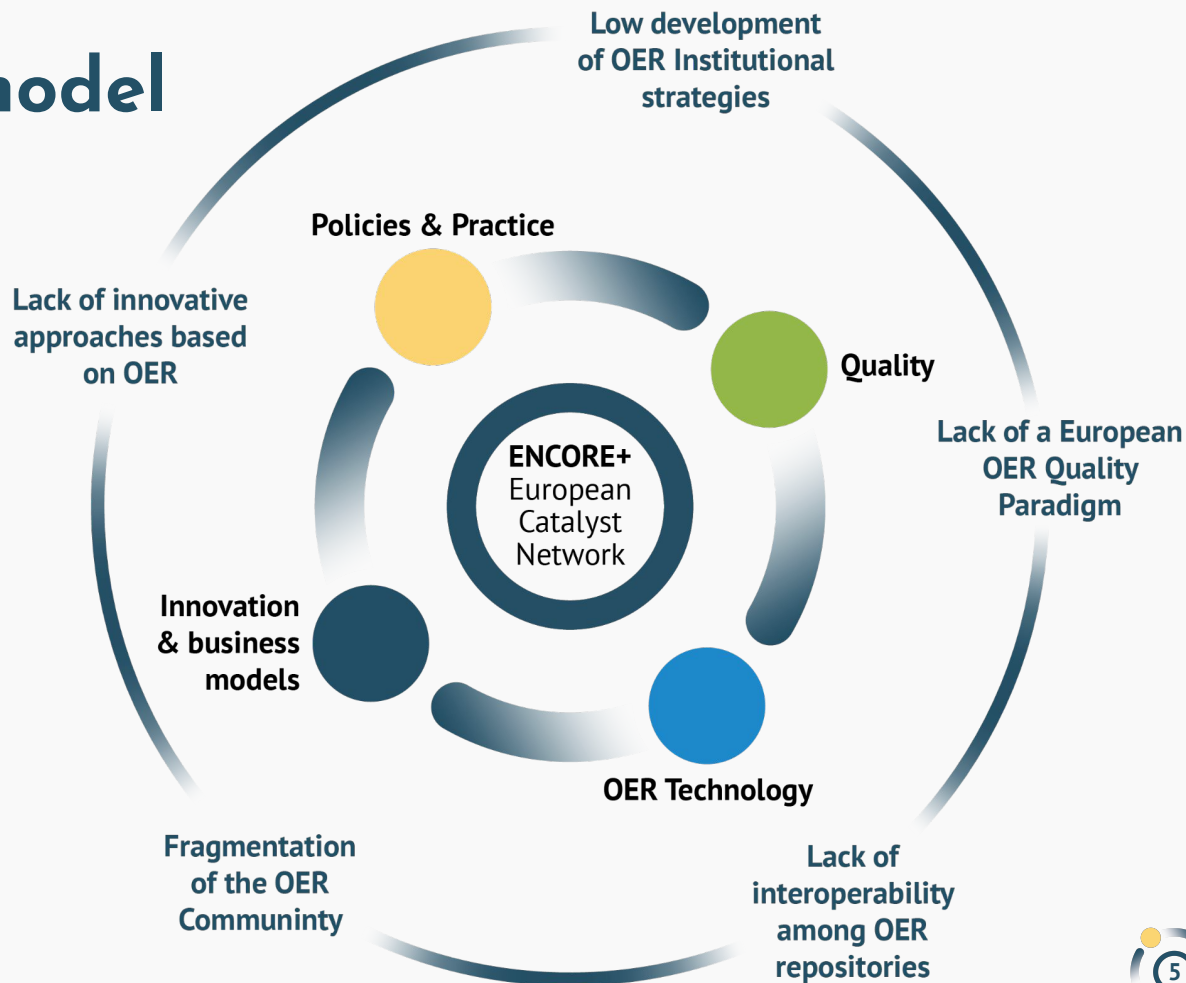
# Overview of Policy and Strategy Landscape



# Overview of Encore policy work

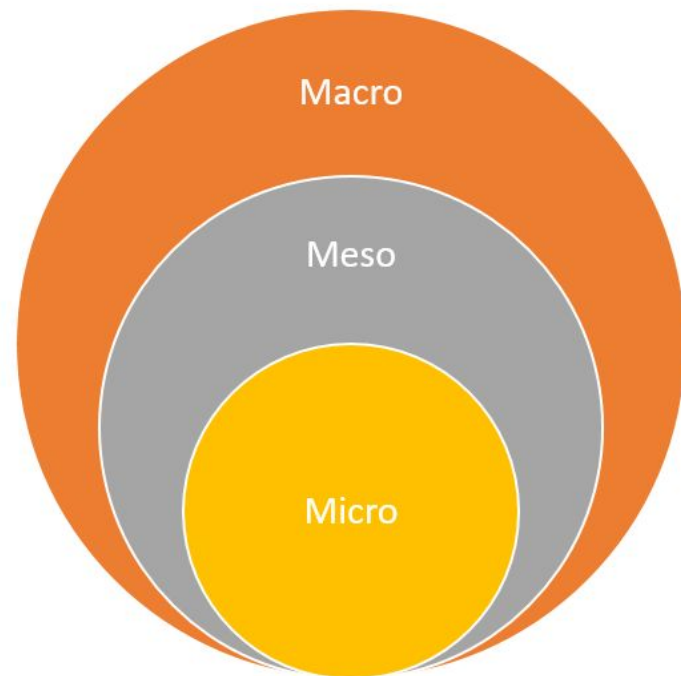
- 4 network events
- 4 position papers
- 4 reports:
  - Strategic Support for OER Value Proposition
  - Business Strategies involving OER
  - OER Policy and Strategy for Higher Education in Europe
  - OER Policy and Strategy Guidelines for HE and Business

# The Ecosystem model



# European Open Education ecosystem

- 3M Framework (Zawacki-Richter, 2022)
- **Macro:** European and National: Policy, Theory, Systems, OER infrastructure, sectoral initiatives
- **Meso:** issues related to the provision of OER in higher education institutions, e.g. technical and support infrastructure professional development, and quality assurance
- **Micro:** creation and use of OER in higher education teaching and learning, and their sharing between faculty







United Nations  
Educational, Scientific and  
Cultural Organization



## Recommendation on Open Educational Resources (OER)

# Definitions...first principles

**“Open Education Resources (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 limited restrictions” (UNESCO, 2012, p. 1).

**Open Educational Practices** “A broad descriptor of practices that include the creation, use, and reuse of open educational resources (OER) as well as open pedagogies and open sharing of teaching practices” (Cronin, 2017, p.1).

**“Open Education policies** are written or unwritten guidelines, regulations and strategies which seek to foster the development and implementation of Open Educational Practices, including the creation and use of Open Educational Resources” (Atenas, Havemann, Neumann, Stefanelli, 2020).



# Policy & Strategy Report

Read online:

<https://encoreproject.eu/2022/07/07/strategic-support-for-oer-value-proposition/>

## Strategic support for OER value proposition

Encore policy and strategy report no.1

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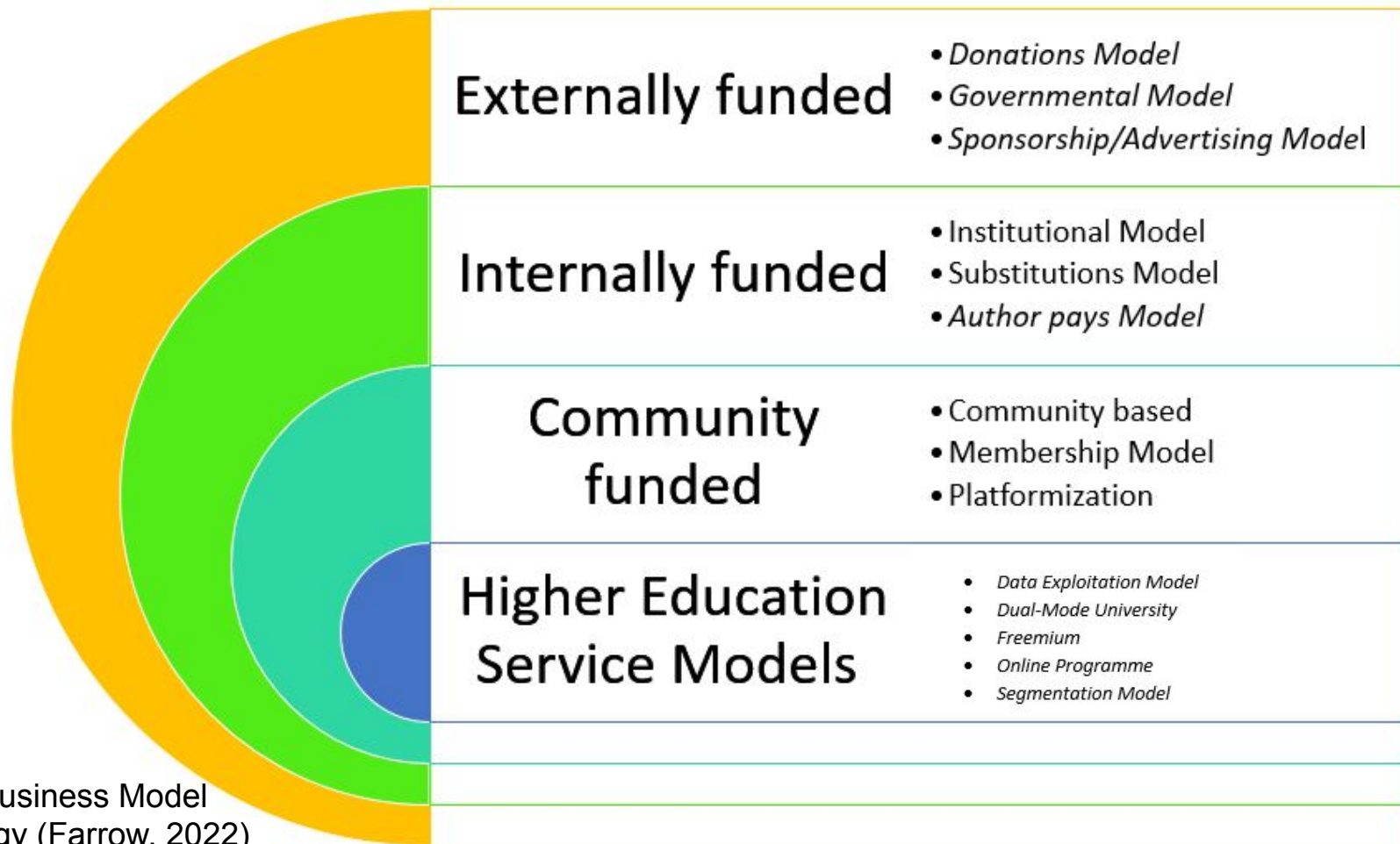
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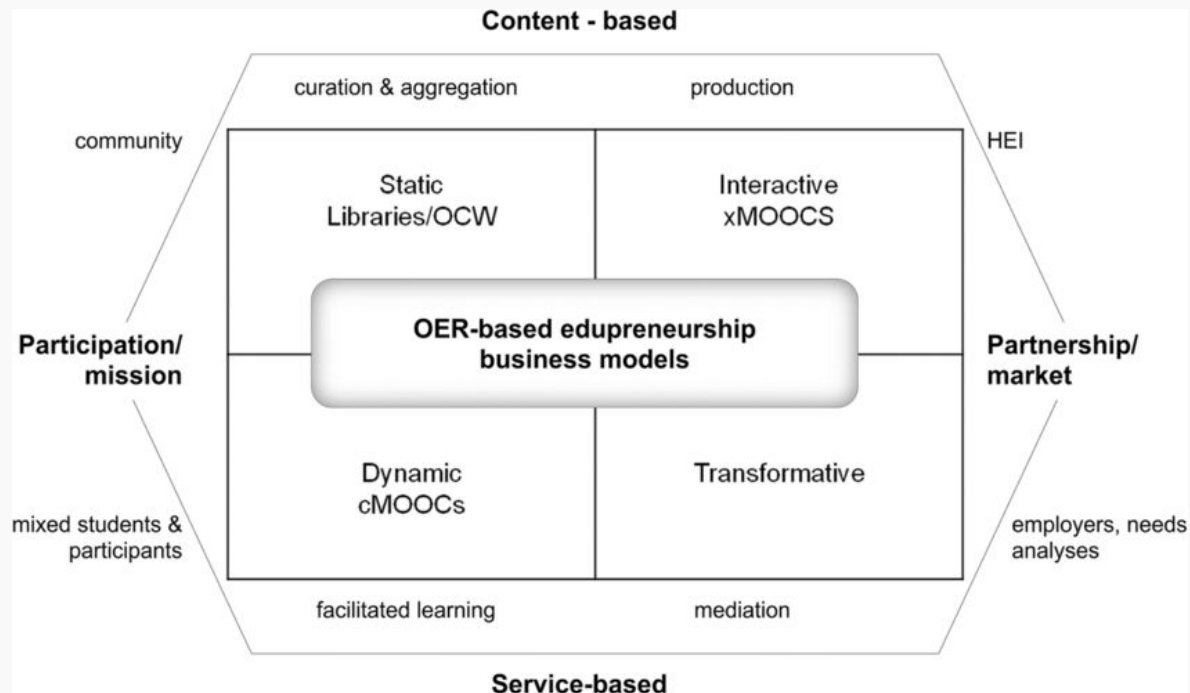
# Main findings

- Overview of existing literature and research in the field of OER in relation to policy and strategy.
- Exploration of business models and approaches to supporting the development of OER.
- Three case studies are presented to illustrate different business models for supporting capability development, knowledge exchange and Communities of Practice.
- Analysis of OER value propositions for business and HE institutions





# Darwish (2019) OER-based Edupreneurship business models



“OER projects disrupt the educational market worldwide. This is not due to the OER humanistic view of Openness as ‘free of charge’ and ‘for free use’ but to **Openness being a premium business value** that creates edupreneurship opportunities within the digital age”

Case studies of HE OER  
implementation at the meso level of  
the institution

### D.4.3 OER Policy and Strategy for Higher Education in Europe

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OER HE Policy Case Studies				
OER policy Initiative	Focus	Target stakeholder	Impact	Sustainability strategy
<i>University of Edinburgh, Scotland</i>	(re)use, create, share and publish OER to improve the quality of the student experience	University staff, students	University level and National level	University funding
<i>OpenLearn, The Open University, UK</i>	publish and promote free learning content	all students on this platform	International level	University funding and public funding
<i>OER Portal, France</i>	discover courses, web documentaries, case studies, guides, tutorials, interactive lessons, Massive Open Online Courses (MOOCs)	undergraduate students and university professors	University level and international level	Donation, Public funding
<i>Kallipos, Greece</i>	create e-textbooks, which are freely available through open-access digital repositories under a Creative Commons licence	Teachers, students, academics	University and National levels	Greek Ministry of Education and University funding
<i>Edusource, the Netherlands</i>	easily find and reuse digital educational resources for teaching or learning	Teachers, students, academics	University and National levels	National funding



8 case studies of businesses  
integrating openness into their  
strategy

## D4.2 Business Strategies involving OER

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# OER in HE

Stefania Aceto (UNIR)



# OER and Openness in Business

Orna Farrell (DCU)



8 case studies of businesses  
integrating openness into their  
strategy

## D4.2 Business Strategies involving OER

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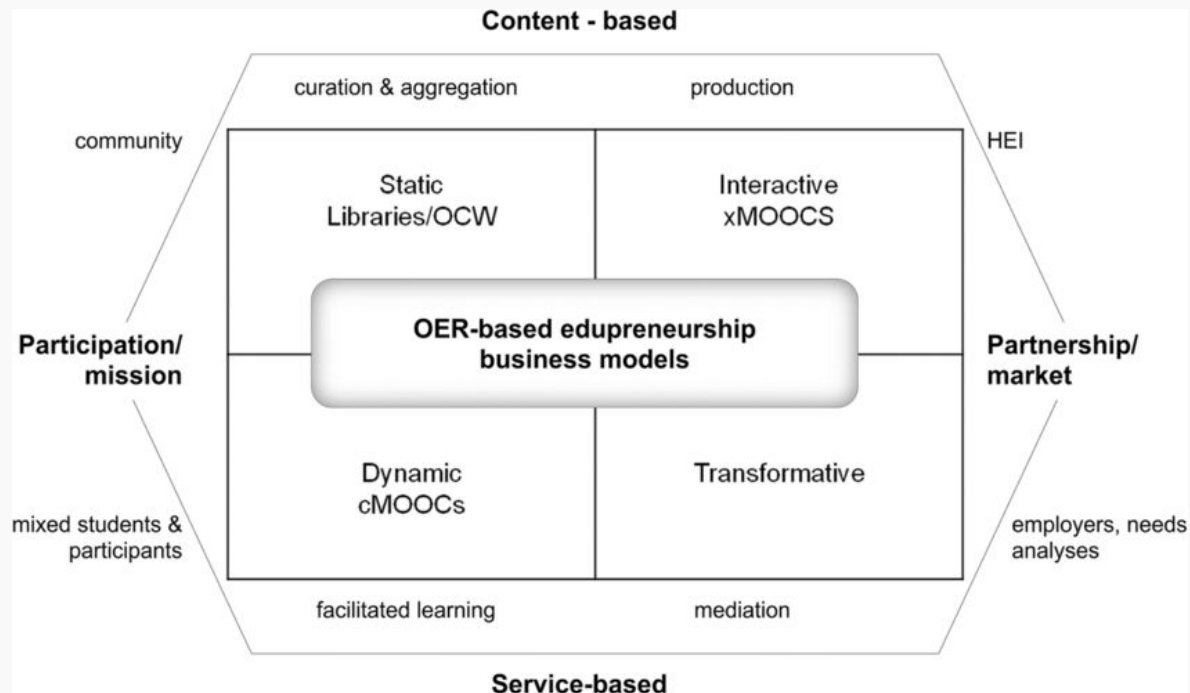
# Open business strategy case studies

- 8 case studies
- Methodology: Interviews and literature review/desk research
- 7 case study interviews
- 2 expert interviews with business experts
- Analysis: thematic analysis, open business model canvas

CC Open Business Model Canvas		Designed for:	Designed by:	Date:	Vers:
<b>Why?</b>					
<b>Key Partners</b> - The people / structure that can help you find your key resources (or even provide them!)	<b>Key Activities</b> - The activities you need to perform in order to deliver your solution.	<b>Value Proposition</b> - The value proposition your solution offers - what you do and why is it better or unique.	<b>Customer Relationships</b> - The customer relationship you develop with which one of your segments and/ or for each one of your activities - how you deliver your activities.	<b>Customer Segments</b> - The groups you believe to be interested in your solution; the people you want to buy and/ or use your solution.	
	<b>Key Resources</b> - The resources you need to perform the key activities (starting with the team!)		<b>Channels</b> - The channel you use to approach your segments.		
	<b>CC Licensed Work</b> - CC licensed materials/ content/ products one can find online to use and remix and integrate in your own production/ works, reducing production costs and gaining access to an immense network of creative people.	<b>Common Good</b> - Highlight the common good (social, environmental, cultural, ...) intrinsic to your value proposition.	<b>CC Licenses</b> - Using the licenses for your own production/ works is a way to reach your segments more rapidly and make sure they'll keep sharing, reselling and remixing it, giving you feedback and helping you improve your work.		
<b>Cost Structure</b> - The costs you will have for putting resources together and performing the activities as you planned (partnerships and CC licensed work can help reduce your cost structure).		<b>Revenue Streams</b> - The revenues you will have for delivering your solution through the channels you selected and the relationships you established with your customers (different segments and the adoption of CC licenses in your own production can help increase your revenue streams).			

Open Business Model Canvas by Fátima São Simão, Creative Commons Aug-2014 based on [Business Model Canvas Poster](#); designed by [Business Model Foundry AG](#) CC BY-SA 3.0

# Darwish (2019) OER-based Edupreneurship business models



“OER projects disrupt the educational market worldwide. This is not due to the OER humanistic view of Openness as ‘free of charge’ and ‘for free use’ but to **Openness being a premium business value** that creates edupreneurship opportunities within the digital age”

You're holding a handbook for visionaries, game changers, and challengers striving to defy outmoded business models and design tomorrow's enterprises. It's a book for the...

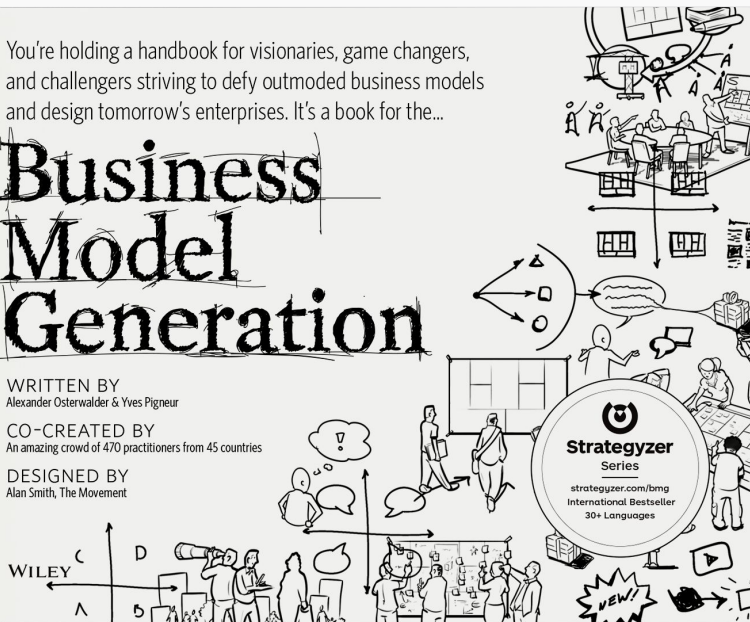
# Business Model Generation

WRITTEN BY  
Alexander Osterwalder & Yves Pigneur

CO-CREATED BY  
An amazing crowd of 470 practitioners from 45 countries

DESIGNED BY  
Alan Smith, The Movement

WILEY

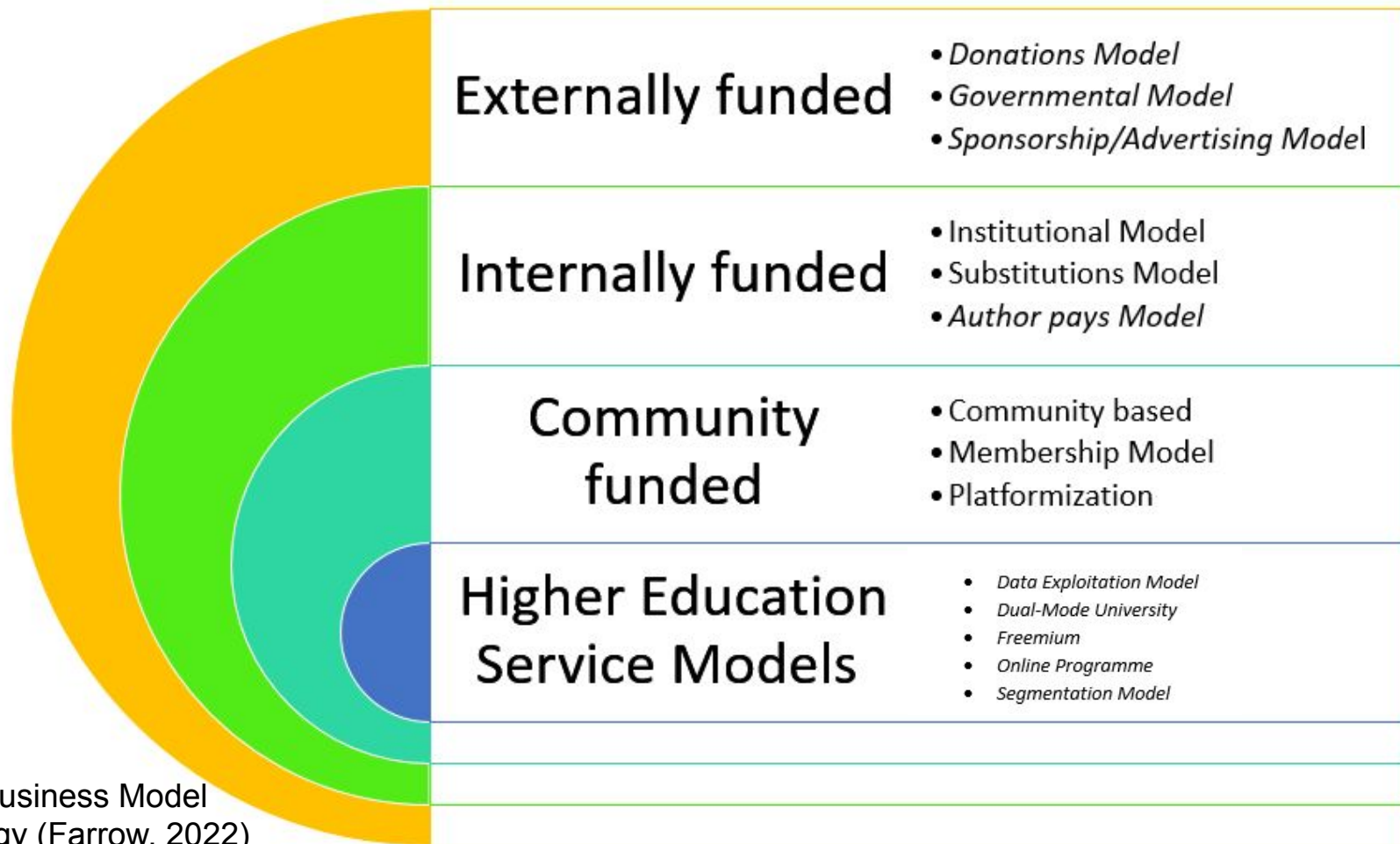


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# The case studies



Company	Business focus	Value proposition
Instructure	VLE/LMS	Deliver dynamic learning experiences. Take teaching and learning to the next level
Catalyst IT	E-learning services and hosting	Fully managed e-learning solutions
H5P group (formerly Joubel)	Content creation platform and services	Easily create and share engaging interactive content  Nice user experience
Studycentral	VLE/LMS	Create engaging learning experiences which are community oriented
Lumen Learning	Courseware	Create deeper and inclusive learning experiences
Merlot	Metadata repository/library, customised community OER services	Facilitate access to quality online learning materials supported by an international academic community  Create online learning materials using free tool  Community
Cogbooks	Courseware	Personalised online learning Student support Insights into student learning
Pressbooks	Open Textbook Content creation platform and services	

# Business model(s) and revenue

Company	Business model(s)	Revenue generation
Instructure	<ul style="list-style-type: none"><li>• Subscription</li><li>• Solution provider</li></ul>	<ul style="list-style-type: none"><li>• Institutional subscription</li></ul>
Catalyst IT	<ul style="list-style-type: none"><li>• Segmentation: services</li></ul>	<ul style="list-style-type: none"><li>• Institutional subscription</li></ul>
H5P group (formerly Joubel)	<ul style="list-style-type: none"><li>• Freemium</li><li>• Segmentation: services</li></ul>	<ul style="list-style-type: none"><li>• Value-Add Services</li></ul>
Studycentral	<ul style="list-style-type: none"><li>• Subscription</li><li>• Solution provider</li></ul>	<ul style="list-style-type: none"><li>• Institutional subscription</li></ul>
Lumen Learning	<ul style="list-style-type: none"><li>• Community</li><li>• Segmentation: services</li></ul>	<ul style="list-style-type: none"><li>• Value-Add Services</li><li>• Grant funding</li></ul>
Merlot	<ul style="list-style-type: none"><li>• Institutional</li><li>• Community</li><li>• Segmentation: services</li></ul>	<ul style="list-style-type: none"><li>• Value-Add Services</li><li>• Grant funding</li></ul>
Cogbooks	<ul style="list-style-type: none"><li>• Subscription</li><li>• Solution provider</li></ul>	<ul style="list-style-type: none"><li>• Institutional subscription</li><li>• Grant funding at start up phase</li></ul>

# Openness & strategy

Company	Business focus/type	Openness and strategy
Instructure	VLE/LMS	Free version of product, Canvas Free-for-Teacher Open community
Catalyst	E-learning services and hosting	Open source user/creator Open philosophy
H5P group (formerly Joubel)	Content creation platform and services	Open version of product H5P.org Open community
Studycentral	VLE/LMS	Open community
Lumen Learning	Courseware	OER Open community
Merlot	Metadata repository/library, customised community OER services	OER Open community
Cogbooks	Courseware	Leverage OER to create courseware



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## Alan Masson (Instructure Case Study)





# Where next?

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## Website

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## Project partners:



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**K4A**  
knowledge for all

**Joubel**



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