

ADULT EDUCATION AND OER 2015 COUNTRY UPDATE: UNITED KINGDOM

Series editors: Giles Pepler and Paul Bacsich

Author: 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.¹ 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.

Each home nation has a Department or Ministry (and sometimes more than one) for education.² 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)³ – 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

¹ 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.

² 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).

³ See <http://www.qaa.ac.uk/>, <http://www.Jisc.ac.uk/> and <https://www.heacademy.ac.uk/>

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 are 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 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.⁴

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).

⁴ <http://www.bbc.com/news/education-31697187>

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.

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).⁵

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

⁵ <http://www.educationscotland.gov.uk/parentzone/myschool/choosingaschool/gaelicmediumeducation/index.asp>

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.⁶ Publicly funded schools follow the Northern Ireland Curriculum.

In 2014/15 there were 338,000 children in schools across Northern Ireland. In total, 175,000 children attended primary schools (including nursery units).⁷ 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)⁸ 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.⁹

⁶ 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

⁷ <http://www.nisra.gov.uk/publications/default.asp6.htm>

⁸ <http://www.niace.org.uk/>

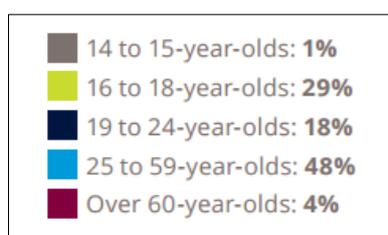
⁹ <http://www.alw.org.uk/>

Community Learning¹⁰ 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.¹¹ NIACE provides an overview of currently relevant policy, funding and guidance documents impacting Community Learning in a rapidly evolving sphere.¹²

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 2014.¹³

In May 2012, the Skills Funding Agency launched an effort to support new learning opportunities, particularly for the disadvantaged, the £4 million **Community Learning Innovation Fund (CLIF)**.¹⁴ 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.¹⁵ Nevertheless, funding for non-apprenticeship adult further education in England will be decreasing by 24% in 2015-16.¹⁶



¹⁰ Prior to 2010, Community Learning was known as Informal Adult and Community Learning, and previously as Adult and Community Learning.

¹¹

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

¹² <https://www.niace.org.uk/community-learning/resources/community-learning>

¹³ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/284119/bis-14-602-community-learning-trust-clt-pilot-evaluation.pdf

¹⁴ See <http://www.niace.org.uk/current-work/clif/community-learning-innovation-fund>

¹⁵ <http://www.aoc.co.uk/sites/default/files/AOC%20KEY%20FACTS%202014.pdf>

¹⁶ <http://www.bbc.com/news/education-31697187>

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.¹⁷

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**,¹⁸ it connects adult learners to several key resources:

- **The National Careers Service**,¹⁹ 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.
- **Apprenticeships** (for ages 14-19),²⁰ for which learners may apply directly through a government web site; and **Traineeships**²¹ (for ages 16-24), whose listings learners may browse directly.
- **Funding guidance**,²² 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**,²³ 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)**.²⁴ The data is collated by the government to monitor policy implementation and the performance of the sector.

The Open University (OU)²⁵ 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

¹⁷ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/32425/12-905-understanding-higher-education-in-further-education-colleges.pdf

¹⁸ <https://www.gov.uk/government/organisations/skills-funding-agency/about>

¹⁹ <https://nationalcareersservice.direct.gov.uk/advice/courses/whylearn/Pages/default.aspx>

²⁰ <https://www.gov.uk/further-education-skills/apprenticeships>

²¹ <https://www.gov.uk/government/collections/traineeships-programme>

²² <https://www.gov.uk/grant-bursary-adult-learners>

²³ <https://www.gov.uk/advanced-learning-loans/overview>

²⁴ http://en.wikipedia.org/wiki/Individualised_Learner_Record

²⁵ <http://www.open.ac.uk/>

field.²⁶ 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.²⁷ 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**²⁸ works closely with unions to provide learning opportunities for its members; the **Prisoners' Education Trust**²⁹ 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)**³⁰ 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 report³¹ 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)**,³² an educational charity which is part of the **Open School Trust**.

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.³³

Adult Education in Wales

In Wales, as in England, NIACE is the national organisation for advancing adult learning.³⁴ **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).³⁵

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.³⁶

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,

²⁶ <http://www.eadtu.eu/home/policy-areas/lifelong-learning/publications/127-showcases-of-university-strategies>

²⁷ <http://www.open.ac.uk/about/main/strategy/facts-and-figures>

²⁸ <https://www.unionlearn.org.uk/>

²⁹ <http://www.prisonerseducation.org.uk/>

³⁰ <https://www.ifl.ac.uk/our-work/about-fpms/>

³¹ 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

³² <https://www.nec.ac.uk/>

³³ https://www.alt.ac.uk/news/all_news/findings-alt-survey-learning-technology

³⁴ <http://www.niacecymru.org.uk/>

³⁵ http://eacea.ec.europa.eu/llp/grundtvig/grundtvig_en.php

³⁶ <http://gov.wales/topics/educationandskills/learningproviders/communitylearning/?lang=en>

Further Education, Higher Education and Work-Based Learning.³⁷ 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**³⁸
- **Careers Wales**³⁹
- **Federation of Awarding Bodies Wales**⁴⁰
- **Federation of Small Businesses Wales**⁴¹
- **National Occupational Standards**⁴²
- **Alliance of Sector Skills Councils**⁴³

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*’.⁴⁴

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’ 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.⁴⁵

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’.⁴⁶

A national **Community Learning and Development** (CLD) team has a remit to support practice and policy development. Much Adult Education occurs through **Community-**

³⁷ <http://gov.wales/topics/educationandskills/qualificationsinwales/creditqualificationsframework/?lang=en>

³⁸ <https://www.ntfw.org/>

³⁹ <http://www.careerswales.com/en/>

⁴⁰ <http://www.awarding.org.uk/fab-groups>

⁴¹ <http://www.fsb.org.uk/wales>

⁴² <http://nos.ukces.org.uk/Pages/index.aspx>

⁴³ <http://gov.wales/topics/educationandskills/qualificationsinwales/creditqualificationsframework/employers/?lang=en>

⁴⁴ <http://gov.wales/docs/strategies/140603progressen.pdf>

⁴⁵ <http://www.open.ac.uk/wales/about-us/facts-and-figures>

⁴⁶ <http://www.educationscotland.gov.uk/communitylearninganddevelopment/professionallearning/workforcesurvey/index.asp>

Based Adult Learning (CBAL);⁴⁷ national CBAL developments may be explored through the following sources:

- **Learning Link Scotland,**⁴⁸ a national intermediary organisation for voluntary organisations that deliver adult learning.
- **Lead Scotland,**⁴⁹ a voluntary organisation widening access to learning for disabled young people, adults and carers across Scotland.
- **Workers Educational Association (WEA),**⁵⁰ a national, democratic, voluntary sector provider of community-based and workplace-based adult learning.
- **College Development Network (CDN),**⁵¹ which supports the college sector to deliver best practice, share innovations and develop colleges and their staff.
- **Scotland's Learning Partnership,**⁵² 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,⁵³ 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 decline in part-time study and an increase in full-time study, which is reflected in college figures on an enrolment and headcount basis.*⁵⁴

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 34.⁵⁵

Launched on 5th November, the **Digitally Agile National Principles**⁵⁶ 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'⁵⁷) offer vocational training as well as higher education programmes. Tuition is free for resident students, and additional living support is

47

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

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

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

50 <http://weascotland.org.uk>

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

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

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

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

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

56 <http://www.digitallyagileld.org/>

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

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.)⁵⁸

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.⁵⁹ The full text of the Act is available online, with amendments through 2014.⁶⁰

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.⁶¹

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.⁶² 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...

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.⁶³

Jisc provides a guide to Copyright Law Essentials as part of its Legal Guidance for ICT Use in Education, Research and External Engagement.⁶⁴ 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

⁵⁸ <http://www.theguardian.com/education/2014/apr/29/free-tuition-scotland-benefits-wealthiest-students-most-study>

⁵⁹ https://en.wikipedia.org/wiki/Copyright,_Designs_and_Patents_Act_1988

⁶⁰ <http://www.legislation.gov.uk/ukpga/1988/48>

⁶¹ http://www.poerup.info/resources/public%20deliverables/POERUP_D4.3_Country_Option_Pack_UKEngland.pdf

⁶² <http://schools.leicester.gov.uk/ls/open-education/>

⁶³ <http://schools.leicester.gov.uk/EasySiteWeb/GateWayLink.aspx?aId=583068>

⁶⁴ <http://www.Jisclegal.ac.uk/LegalAreas/CopyrightIPR/CopyrightLawEssentials.aspx>

purposes without the need to seek permission from copyright owners'.⁶⁵ The 2014 amendments are available online in an informal capacity as a PDF, for comparison purposes.⁶⁶

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.⁶⁷

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);⁶⁸ 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*⁶⁹ from the Open University's OER Research Hub.)

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**.⁷⁰ 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.)

⁶⁵ <https://www.gov.uk/government/news/changes-to-copyright-law>

⁶⁶ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/308729/cdpa1988-unofficial.pdf

⁶⁷ http://poerup.referata.com/wiki/United_Kingdom

⁶⁸ 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)

⁶⁹ <http://oermap.org/>

⁷⁰ 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>

- **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*⁷¹ between 2011 and 2013. This programme builds on previous Jisc Digitisation and Content Programmes⁷² 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.)⁷³

In October 2013 the OU announced the MOOC initiative *FutureLearn* ('free online courses from top universities and cultural institutions').⁷⁴ 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.

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.*⁷⁵

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

⁷¹ http://www.jisc.ac.uk/whatwedo/programmes/digitisation/content2011_2013.aspx

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

⁷³ <http://www.open.edu/openlearn/about-openlearn/frequently-asked-questions-on-openlearn>

⁷⁴ <https://www.futurelearn.com/>

⁷⁵ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/240193/13-1173-maturing-of-the-mooc.pdf

targeting further education and community learning, as recently announced in the United States.⁷⁶

The POERUP report on the United Kingdom contains a great deal of detail on the specific OER developed in England under earlier funded programs.⁷⁷

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**⁷⁸ (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.⁷⁹

Hwb⁸⁰ is the schools-level repository of open educational material; there is also the Y Porth portal of Welsh-language material.⁸¹ 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 commitment to OER;⁸² there is now a designated OER Wales portal consolidating all work in this area, featuring the OER15 conference, which it will host.⁸³ 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**.⁸⁴ 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.⁸⁵

⁷⁶ <http://www.doleta.gov/skillsacademy/>

⁷⁷ http://poerup.referata.com/wiki/United_Kingdom

⁷⁸ <http://schools.leicester.gov.uk/ls/open-education/>

⁷⁹ http://poerup.referata.com/wiki/File:POERUP_D4.3.1UKW.pdf

⁸⁰ <https://hwb.wales.gov.uk/Community/Pages/Home.aspx>

⁸¹ <http://hwb.wales.gov.uk>

⁸² <http://www.uniswales.ac.uk/welsh-universities-sign-declaration-of-intent-embedding-open-education-at-the-heart-of-their-strategies/>

⁸³ See <http://www.oerwales.ac.uk/> and <http://oer15.oerconf.org/>

⁸⁴ <http://wales.gov.uk/docs/dcells/publications/140402-online-digital-learning-working-group-en.pdf>

⁸⁵ <http://www.open.ac.uk/wales/openlearnchampions>

Scotland

The POERUP report on Scotland⁸⁶ 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**,⁸⁷ 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**⁸⁸ – 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**,⁸⁹ 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)**⁹⁰ 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.⁹¹

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**⁹² – came together voluntarily to produce an *Open Scotland Declaration*⁹³ (a deliverable from the Open Scotland Summit). This declaration builds on the *UNESCO 2012 Paris OER Declaration*⁹⁴ 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

⁸⁶ http://poerup.referata.com/w/images/POERUP_D4.3.1UKS_Country_Option_Pack_Scotland.pdf

⁸⁷

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

⁸⁸ <http://www.jorum.ac.uk/>

⁸⁹ <http://resource.blogs.scotcol.ac.uk/>

⁹⁰ www.oepscotland.org

⁹¹ <http://www.rsc-scotland.org/?p=2454>

⁹² See <http://www.cetis.ac.uk/>, <http://www.sqa.org.uk/sqa/70972.html>, <http://www.Jiscrsc.ac.uk/scotland>, and <https://www.alt.ac.uk/get-involved/special-interest-groups/scotland>

⁹³ <http://declaration.openscot.net/>

⁹⁴

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

'promoted and supported' by the College Development Network Board and Principals' Executive Group and Scottish Government, as mentioned in the CDN Operational Plan for 2014-15.⁹⁵ 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.⁹⁶

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.⁹⁷
- Pedagogical aspects – practical resources and guides: Links to resources addressing matters of quality as well as trust, curriculum needs and development.⁹⁸
- Technical aspects – practical resources and guides: Links to resources addressing technical concerns, e.g. hosting, metadata and discoverability.⁹⁹
- Pilot programme outputs – Quality issues: Five projects addressing quality issues.¹⁰⁰
- CORRE: Quality Matters in OERs: A simple framework for transforming teaching materials into OERs (OTTER Project).¹⁰¹

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.¹⁰²

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 not to introduce onerous systems in their 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).¹⁰³

⁹⁵ <http://www.collegedevelopmentnetwork.ac.uk/download-document/5682-cdn-strategy-operational-plan-2014-15>

⁹⁶ http://poerup.referata.com/w/images/POERUP_D4.3.1UKS_Country_Option_Pack_Scotland.pdf

⁹⁷ <https://openeducationalresources.pbworks.com/w/page/24838164/Quality%20considerations>

⁹⁸ <https://openeducationalresources.pbworks.com/w/page/62667648/UKOERGuides%20PedagogicalAspects>

⁹⁹ <https://openeducationalresources.pbworks.com/w/page/62666418/UKOERGuides%20TechnicalAspects>

¹⁰⁰ <https://openeducationalresources.pbworks.com/w/page/27129220/Pilot%20programme%20outputs%20-%20Quality%20issues>

¹⁰¹ http://www2.le.ac.uk/departments/beyond-distance-research-alliance/projects/otter/about-oers/Corre-web.pdf/at_download/file

¹⁰² <http://www.researchinlearningtechnology.net/index.php/rlt/article/view/20889#sidebarRTAutho>
rBios and <http://eprints.soas.ac.uk/17347/1/30-288-1-PB.pdf>

¹⁰³ <http://oerresearchhub.org/2014/11/10/making-oer-mainstream-in-schools/>