The six essential OER adoption factors

**Volition**
The 6th factor refers to an agent’s motivation to adopt OER. If the agent (educator or institution) enjoys the access, permission, awareness, capacity and availability necessary to adopt OER, then volition becomes the key factor in whether they will do so. This outcome is shaped by the agent’s pedagogical values, social context and institutional culture.

**Availability**
The 5th factor refers to the availability of OER for an agent to use or contribute. For users, this is determined by an OER’s relevance (content, scope, tone, level, language, format), utility for a specific anticipated use, and quality as judged by the user. For creators, it is determined by whether they feel their educational materials are relevant and of the requisite quality (based on one’s pedagogical self-confidence).

**Capacity**
The 4th factor refers to the technical and semantic skills necessary for adopting OER. This capacity can be held by the educator or found through institutional support. It implies an educator or institution enjoys the technical fluency to search for, identify, use, and/or create (license and upload) OER, or has access to people with those skills.

**Awareness**
The 3rd factor refers to the fact that a potential OER adopter must have been exposed to the concept of OER and grasped how it differs from other types of (usually copyrighted) educational materials. Educators may inadvertently use OER, of course, but this does not comprise OER adoption per se, which requires a level of OER awareness.

**Permission**
The 2nd factor refers to an agent’s legal right to use or create OER. For users, the OER license determines permission parameters. For creators, institutional IP policies usually determine whether educators or institutions hold copyright over teaching materials produced at the institution. Only copyright holders can be OER creators.

**Access**
The 1st factor refers to the need for agents to have access to the appropriate physical hardware and infrastructure – such as electricity, internet connectivity and computer devices – for engaging with digitally mediated OER.

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The OER Adoption Pyramid

- **Volition**
- **Availability**
- **Capacity**
- **Awareness**
- **Permission**
- **Access**

**Questions for potential OER users**

**Volition**
Do you have any desire to use OER?

**Availability**
Have you found OER online – of acceptable relevance, utility and quality – that you can use?

**Capacity**
Do you know how and where to search for and identify OER? How do you know how the different CC licenses impact the ways in which you can use an OER? If no to the above, does your institution have personnel you can call on to assist you with this?

**Awareness**
Do you have any knowledge of or experience with OER? Do you understand how Creative Commons (CC) licenses differentiate OER from traditionally copyrighted materials?

**Permission**
Do you have permission (from your curriculum committee, etc.) to use OER for teaching? Does the desired OER you are considering allow you to use it in your specific context (e.g., no CC-ND licenses on items that will be sold as course material)?

**Access**
Do you have (stable) electricity provision? Do you have (stable) internet connectivity? Do you have the necessary computer hardware for OER adoption?

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**Questions for potential OER creators**

**Volition**
Do you have any desire to create and share your teaching materials as OER?

**Availability**
Do you hold copyright over teaching materials – of necessary relevance and quality – that you could license and share as OER?

**Capacity**
Do you know how to license your teaching materials so that they can be shared as OER? Do you know where (on which platforms) you can upload your materials as OER? If no to the above, does the institution have personnel who do know this and can assist?

**Awareness**
Do you have any knowledge of or experience with OER? Do you understand how Creative Commons (CC) licenses differentiate OER from traditionally copyrighted materials?

**Permission**
Do you possess copyright over teaching materials that have been developed at your institution?

**Access**
Do you have (stable) electricity provision? Do you have (stable) internet connectivity? Do you have the necessary computer hardware for OER adoption?
BACKGROUND AND PURPOSE OF THE OER ADOPTION PYRAMID

This Pyramid was developed in the course of a research project focusing on why South African academics adopt OER or not. We understood that numerous factors shaped their choices, but it became apparent that some factors were “essential” to OER activity while others were merely “influential”. To clarify which factors were required for any type of OER activity, we developed the OER Adoption Pyramid, which consolidates the factors into six hierarchically related categories: access, permission, awareness, capacity, availability and volition. Under these terms we can place numerous other sub-factors which emerge in the OER literature, such as quality, relevance, localisation, licensing, self-confidence, etc. Going from bottom to top, these categories move from factors that are largely externally defined to factors that are more personally determined. The pyramid reveals that, ultimately, only academics or institutions that possess all six of these attributes at the same time (even if in some modified or attenuated fashion) can engage in OER activity. If even one of these elements is missing, they cannot participate in OER activity.

OER READINESS TABLES

an example

With the help of the pyramid, we assessed the OER readiness of three South African universities. Presented here anonymously, the assessments generated the following tables which highlight which factors stand as obstacles to OER readiness at each institution, depending on who is the agent of analysis (academic or institution) and which element of adoption we are focusing on (use or creation).

University profiles

<table>
<thead>
<tr>
<th>Student access</th>
<th>#1</th>
<th>#2</th>
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<tbody>
<tr>
<td>Student numbers</td>
<td>26 000</td>
<td>11 000</td>
<td>400 000+</td>
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<tr>
<td>Location</td>
<td>Urban</td>
<td>Rural</td>
<td>Dispersed</td>
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<tr>
<td>Approach</td>
<td>Traditional</td>
<td>Traditional</td>
<td>Comprehensive</td>
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<tr>
<td>Institutional culture type</td>
<td>Collegial</td>
<td>Bureaucratic</td>
<td>Managerial</td>
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<tr>
<td>Copyright holder over teaching materials</td>
<td>Lecturer</td>
<td>University</td>
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OER Readiness: academics as users

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<th>Volition</th>
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OER Readiness: academics as creators

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OER Readiness: institutions as creators

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Level of OER Readiness

- Very High
- High
- Medium
- Low
- Very Low

HOW TO USE THE OER ADOPTION PYRAMID

The Pyramid enables comparison of the factors involved in OER adoption at an institutional site, whether the agent of analysis is an academic or the institution itself. It prompts a series of questions (above) which can help assess the OER readiness of an institution. If the answer is “no” to any of the questions above, then OER activity for the relevant agent (an academic or institution) cannot proceed.

From this analysis, one may then generate OER Readiness Tables (below), which show which factors act as obstacles or opportunities with regard to potential OER activity at an institution. These are useful for multi-institution comparisons or for sharing with stakeholders who want to enhance OER adoption at an institution.

"only those who possess all six of these attributes at the same time (even if in some modified or attenuated fashion) can engage in OER activity"