

OPEN EDUCATION AND OPEN EDUCATIONAL RESOURCES RESEARCH AGENDA

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Amanda Coolidge, Eric Ambroso, and Kate Baca





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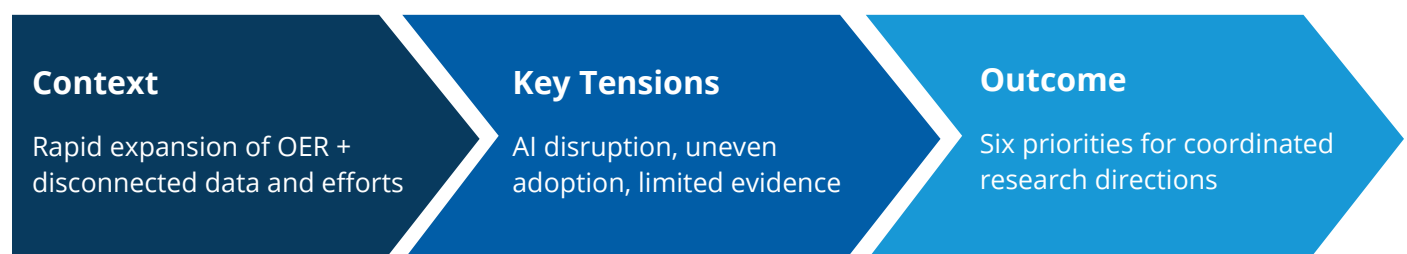
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EXECUTIVE SUMMARY

The four regional education compacts are collaborating to scale and sustain the use of open educational resources, which are high-quality teaching and learning materials that are free for educators and students to use, customize, and share. The work of this collaboration, known as the National Consortium for Open Educational Resources (NCOER), is funded by grants from the William and Flora Hewlett Foundation to the Midwestern Higher Education Compact (MHEC), the New England Board of Higher Education (NEBHE), the Southern Regional Education Board (SREB), and the Western Interstate Commission for Higher Education (WICHE). In 2025, the compacts collaboratively launched a nationwide initiative to develop a cohesive research agenda that would guide future investment, policy development, and scholarly inquiry in open education. This work responds to a decade of growth in open educational resources (OER) and the increasing need for coordinated, evidence-based strategies that strengthen affordability, access to required course materials, and student success across the United States. The agenda was informed by an extensive consultation process involving literature review, national surveys, and interviews with researchers, faculty, librarians, system leaders, and policy stakeholders.

Participants emphasized that open education has matured beyond early questions of cost savings. Institutions are now wrestling with long-term sustainability, the rapid rise of artificial intelligence (AI), persistent gaps in evidence about student learning, and uneven adoption across academic disciplines. Stakeholders also highlighted widespread fragmentation in research efforts, noting that valuable datasets and parallel projects rarely intersect. Together, these insights point to a field ready for more coordinated, rigorous, and scalable research capable of informing state- and system-level decision-making.



Research Priorities Overview

The research agenda identifies six priorities:

01 **Student Outcomes and Experiences.**

Move beyond affordability metrics to study how students learn with OER, experience open pedagogy, and navigate increasingly complex digital and AI-mediated learning environments.

02 **Long-term Sustainability and Institutional Support for Open Education.**

Understand how OER programs evolve, persist, and adapt over time, including funding models, governance structures, maintenance processes, and institutional conditions that support durable and scalable OER adoption.

03 **Intersection of Open Education and Artificial Intelligence.**

Examine how AI reshapes OER creation, pedagogy, student behavior, and the broader knowledge ecosystem, and identify implications for ethics, access, and sustainability.

04 **Evolution of Cost-savings and Affordability Research.**

Update cost analyses and expand research to understand student decision-making, price transparency, and the long-term academic impacts of textbook affordability.

05 **Discipline-specific Approaches, Needs, and Practices.**

Identify how disciplinary cultures, curricular structures, and faculty norms influence OER adoption, adaptation, and open pedagogy across fields.

06 **Research Collaboration and Shared Infrastructure.**

Address fragmentation by building coordinated research infrastructures, aligning priorities across regions, and supporting shared data systems and cross-institutional research.

Recommendations

To act on these findings and ensure this agenda guides future policy and investment, NCOER recommends the following actions:

- ▶ **Build a cohesive national OER research infrastructure** to align data collection, strengthen methodological consistency, and support cumulative, comparable research across states and systems.
- ▶ **Elevate practitioner and student perspectives and strengthen discipline-based engagement** by supporting studies that capture learner experiences, faculty practices, and discipline-specific needs.
- ▶ **Strengthen collaboration across regions, systems, and sectors** to reduce duplication, share insights, and build models that scale across multiple institutions.
- ▶ **Advance research on emerging and complex issues shaping open education** including AI, technology shifts, and sustainability models, to ensure open education remains responsive to emerging opportunities and risks.
- ▶ **Support evidence-based policy and investment strategies aligned with the national research agenda** to include incentive structures, recognition systems, and long-term funding models.
- ▶ **Evaluate the impact of this research agenda over time** to ensure it enables research activity, guides funding decisions, or shapes scholarly priorities and remains relevant, actionable, and aligned with national needs.

Together, these research priorities and recommendations provide a strategic foundation for strengthening the national evidence base for open education. By investing in coordinated, high-quality research aligned with practitioner needs and cross-regional collaboration, states, systems, and institutions can build more sustainable ecosystems that advance student success across the country for all learners.

Development of a National Research Agenda

The four regional education compacts are collaborating to strengthen policy, practice, and research in open education. The work of this collaboration, known as the National Consortium for Open Educational Resources, is funded by grants from the William and Flora Hewlett Foundation to the Midwestern Higher Education Compact (MHEC), the New England Board of Higher Education (NEBHE), the Southern Regional Education Board (SREB), and the Western Interstate Commission for Higher Education (WICHE). The consortium provides a framework for collaboration among states, systems, and institutions across the U.S. that advance the use of OER. By aligning regional efforts, the collaboration helps identify shared priorities, scale effective models, and develop evidence-based strategies for sustaining open education. Its work connects policymakers, institutional leaders, faculty, and researchers, creating a community of practice focused on building sustainable approaches to OER adoption and implementation.

In 2025, the compacts launched an initiative to develop a nationwide research agenda for open education and OER. The goal of this work was to provide a strategic framework to guide future research, investment, and policy development. The agenda identifies key gaps in existing evidence, elevates the priorities of practitioners and decision-makers, and outlines opportunities for collaboration across regions and sectors.

The research agenda process was collaborative, engaging participants from multiple regions and institutional roles, and grounded in their real-

world experience. Participants included faculty members, librarians, instructional designers, technologists, policymakers representing OER practitioners, and experts at every level. It ensured that research in open education will reflect the needs of educators and learners, emphasizing learning opportunities across varied institutional, geographic, and economic contexts, and supporting innovation. This agenda now serves as a roadmap for funders, researchers, and policymakers to advance the field in a coordinated and sustainable way.

INTRODUCTION

The global movement toward open education has matured significantly since UNESCO first defined open educational resources (OER) in 2002. What began as an effort to increase access and affordability has evolved into a broad field concerned with teaching and learning innovation, access to required course materials and instructional resources, institutional policy, and long-term sustainability. The literature shows a clear shift from early enthusiasm about free access and cost savings toward deeper engagement with how openness reshapes pedagogy, governance, and systems of knowledge production.

Research on OER adoption identifies both benefits and persistent barriers. Studies consistently note limited faculty awareness, lack of technical support and time, and few institutional incentives for OER creation and adoption. Despite these challenges, strong evidence demonstrates that OER reduces student costs and can improve academic performance and retention, particularly for students from lower-income households and students enrolled at institutions with limited instructional resources.¹

Faculty report that using OER allows them to customize and update course materials to fit student needs, which strengthens both pedagogy and engagement. Large-scale initiatives led by governments and intergovernmental organizations have accelerated OER adoption, but their effectiveness depends on local policy frameworks, institutional capacity, and intergovernmental effectiveness.

As OER usage has expanded, researchers have increasingly focused on open educational practices (OEP), the pedagogical and participatory dimensions of openness. OEP extends beyond free content to emphasize collaboration, learner agency, and the co-creation of knowledge. Educators who engage in open practices often adapt or remix materials to improve their alignment with course goals and student learning needs, supported by librarians and instructional designers who provide technical and licensing expertise. Open pedagogy has drawn attention for its potential to transform learning by inviting students to contribute to public scholarship and resource creation. Studies find that these practices increase motivation and ownership of learning but also require guidance to address licensing and privacy issues.²

Open pedagogy invites students to become co-creators of knowledge rather than just consumers.

The literature on policy and sustainability suggests structural supports are critical for lasting impact. Research shows that policies mandating open licensing for publicly funded materials or integrating OER into strategic plans can normalize openness at scale.³ Aligning open education with the United Nations Sustainable Development Goals (SDG), particularly SDG 4 on quality education, has increased visibility and investment. However, sustainability remains a central challenge. Scholars note that



many OER projects rely on short-term grants or volunteer labor and risk fading without institutional integration. Without deliberate planning for ongoing support — financial, technical, and social — even successful OER projects risk fading out.⁴ Financial, technical, and social infrastructure are all needed to embed openness within organizational systems and ensure long-term viability.

Technology continues to shape the open education landscape. Early enthusiasm for massive open online courses (MOOCs) demonstrated the promise of scaling access but also revealed limitations: many MOOCs are not truly open in licensing or design, due to inability to remix, revise, and redistribute the content. Current studies call for attention to use across systems and contexts, accessibility, and data ethics, emphasizing that technological innovation must align with open principles rather than dilute them. The integration of open data, open science, and open-source software demonstrates the potential for a more connected and transparent ecosystem of teaching and research.

OER and OEP are increasingly viewed as tools that broaden access to course materials, expand instructional choice, and support the representation of multiple cultural and disciplinary perspectives. Researchers emphasize that openness alone does not ensure consistent access to educational resources across institutions and learners, and that deliberate design for accessibility, language diversity, and cultural relevance is essential. Frameworks developed by Hodgkinson-Williams and Trotter⁵ and Lambert⁶ propose measuring OER's impact by examining changes in access to educational

opportunities and the representation of perspectives that have been less visible in prior research and practice. Critical scholars caution that without such intentionality, open education can replicate existing differences in access to educational resources rather than reduce them.⁷

Finally, the field's theoretical base has strengthened. Earlier work focused on advocacy and case studies, while recent research calls for conceptual clarity and methodological rigor. Scholars argue that OER research has been undertheorized and must engage more fully with established educational theories to explain how openness affects learning, teaching, and systems change. Bibliometric studies show rapid growth in the field but also fragmentation across disciplines. Developing shared frameworks that connect OER, OEP, and open pedagogy will be key to advancing coherent and cumulative knowledge.

Across literature, open education is portrayed as both practical and transformative. The evidence demonstrates that openness can lower costs, enhance teaching, and expand participation, but that these outcomes depend on sustained support, intentional instructional design, and ongoing evaluation. As open education becomes embedded in mainstream policy and institutional practice, research has an essential role in guiding its direction, measuring its impact, and ensuring that openness fulfills its promise to democratize learning. There are still persistent gaps for open education and its outcomes. This research agenda aims to serve as an articulation of the research needs to advance the field of open education.

RESEARCH PRIORITIES

The following sections outline the core research priorities that emerged from NCOER’s national consultation process, which included extensive interviews, literature analysis, and cross-regional engagement with practitioners, researchers, and institutional leaders (see Table 1). Together, these priorities capture the most pressing questions facing the open education field and illuminate where new evidence is urgently needed to guide policy, investment, and implementation. They reflect a rapidly evolving educational landscape shaped by technological change, shifting student behaviors, institutional pressures, and the maturation of OER initiatives across the United States. Each priority identifies key areas where coordinated research can advance understanding, strengthen decision making, and support the long-term development of sustainable, effective, and learner-centered open education systems.

Table 1: Research Priorities

RESEARCH PRIORITIES	
01	Student Outcomes and Experiences
02	Long-term Sustainability and Institutional Support for Open Education
03	Intersection of Open Education and Artificial Intelligence
04	Evolution of Cost-savings and Affordability Research in Open Education
05	Discipline-specific Approaches, Needs, and Practices in Open Education
06	Research Collaboration and Shared Infrastructure in Open Education

01 Research Priority: Student Outcomes and Experiences

Student outcomes and lived experiences remain one of the least developed areas of open education research. While early work documented the affordability benefits of OER, interview participants emphasized that far less is known about how students learn with open materials, how they experience open pedagogical practices, and which aspects of open education influence their academic progress, confidence, or engagement. During interviews, OER practitioners repeatedly described the need to move beyond cost metrics and toward research that captures the realities of student learning in OER-supported environments.

The literature reflects this gap. Studies suggest that OER adoption does not negatively impact academic performance, and several meta-analyses find no significant grade differences between OER and commercial textbooks.⁸ Scholars also note benefits such as day-one access, flexibility, and opportunities for localized course design.⁹ Yet most research is still limited to perception surveys or single-course studies with little generalizability.¹⁰ The field lacks longitudinal, qualitative, and mixed-methods research on how open practices shape learning, metacognition, motivation, and persistence over time.

Across interviews, participants described this as a critical moment to deepen understanding of students' experiences with open materials and practices, especially as new technologies, including AI, change how they access and engage with course content. Respondents urged the field to examine not only whether students succeed in OER-supported courses, but how and why. They also stressed the importance of context: the same open

material may have different effects depending on instructional design, course structure, or student background. As one participant noted, generalizing from single-course studies can be misleading: "All I can report on is these particular OER we were studying." This reflects a call for research that is well-designed and distinguishes findings that generalize from those tied to specific settings.

The subsections that follow outline the most pressing research needs identified across interviews, highlighting where student-focused research is emerging, where major gaps remain, and where targeted inquiry could strengthen understanding of student learning in open education environments.

KEY RESEARCH TOPICS

1. Student Learning Experiences with OER and Open Pedagogy. Interviewed experts consistently emphasized the need for research that captures the nuanced experiences of students learning with OER and participating in open pedagogical activities. Many noted that although students often express positive attitudes toward open materials, far less is known about how OER shapes their motivation, metacognition, confidence, or engagement. Respondents argued that qualitative and mixed-methods approaches, such as interviews, reflective journals, learning analytics, or analysis of student-created open materials, could provide deeper insights into how students navigate open learning environments.

These needs echo recent literature describing the potential of open pedagogy to reshape students' roles as co-creators, contributors, and

active participants.¹¹ Yet, systematic evidence of how students experience these practices remains sparse. Interviewees highlighted this gap as a priority for the field, particularly for understanding the factors that support or hinder meaningful learner engagement.

2. Generalizability of Student Outcome Studies. Participants expressed concern that many widely cited OER impact studies rely on narrow contexts, small samples, or one-time implementations. Several described unsuccessful attempts to replicate influential findings related to improved student achievement or course completion. These experiences raised broader questions about the durability of common assumptions within the field. One interviewee summarized the issue: “We did not replicate the results... we didn’t replicate that any way you slice and dice the data.” Others called for a more systematic program of replication studies that revisit influential claims and test them across multiple institutions, disciplines, and instructional contexts.

This methodological shift aligns with critiques in the literature that call for theory-informed, robust research capable of differentiating between generalized effects and context-specific outcomes.¹² Interviewees expressed a desire for future investigations that incorporate instructional design variables, differences in course structure, or changes in OER versions over time.

3. Moving Beyond Perception Surveys and Grade Comparisons. A clear theme across interviews was that certain research questions, especially those examining whether OER affect grades, are now largely saturated. Multiple

respondents mentioned that several meta-analyses have found negligible performance differences between OER and commercial resources, suggesting that the field should move toward more complex measures of student learning. As one participant noted: “That’s been pretty well exhausted... there’s been four or five meta-analyses, and they’ve all found zero difference or negligible differences.” Interviewees suggested shifting focus toward understanding retention, the impact of zero-cost degree pathways, or how Universal Design for Learning (UDL)-aligned and “homegrown” OER courses influence learning.

The literature supports this direction. Research increasingly highlights the importance of examining learning design, availability of materials from day one, and the adaptability of open content as factors that shape outcomes beyond grades.¹³ More holistic measures, such as student confidence, persistence, attendance patterns, and depth of engagement, remain underexplored but highly relevant.

4. Long-term Effects of Open Education on Student Outcomes. Interview participants stressed that the field needs to move past correlational studies and begin examining what causes outcomes to change. Suggested approaches included longitudinal cohort studies, quasi-experimental designs, and mixed methods analyses that trace the relationship between open materials, instructional design, and student behaviors over time. Participants also expressed interest in understanding how different groups of students respond to OER or open pedagogy, particularly when open materials are intentionally written to be more contextually resonant,

accessible, or adaptable. One interviewee shared: “I’m most interested in how students respond to OER that have been intentionally designed with learners in mind.” These comments align with larger scholarly discussions calling for more context-rich, theoretically grounded research that examines how open resources interact with course design, student background, and pedagogical approaches.¹⁴

Instructional design is defined as the creation of instructional materials. This can extend into understanding the learning needs of students, the design and improvement of learning materials, and evaluating materials as they are used to improve learning.

5. Open Pedagogy as a Distinct Area of Student Learning Research. Respondents described open pedagogy as an especially promising, yet still underdeveloped, area of research. Several described a growing interest in understanding how students experience activities such as co-creating course materials, contributing to open knowledge platforms, or engaging in authentic, publicly facing assignments.

OER practitioners suggested that open pedagogy can influence not only learning outcomes but also students’ sense of contribution, ownership, and engagement with their coursework.

However, these effects remain largely documented through case studies with limited methodological rigor. As one participant observed, “The types of research that

showed student success would be really compelling... We are at a crossroads. What do we want higher education to look like?”

Scholars similarly argue that open pedagogy needs clearer definitions, broader implementation, and stronger research foundations.¹⁵ This suggests a major opportunity for systematic study.

CONCLUSION

Student outcomes and experiences represent a critical edge for open education research.

The field must develop a more comprehensive evidence base that examines how students learn, participate, and grow within open environments, and how instructional design, course context, and open practices shape those experiences.

Stakeholders argued that although cost savings remain essential, they are no longer sufficient for understanding the true impact of open education on teaching and learning.

The literature is clear that using OER has positive student outcomes on short-term or course level scales and there should be deeper inquiry into how OER influences student learning. Future research that is rigorous, replicable, and grounded in the lived experience of students will be essential for advancing open education in ways that are meaningful, credible, and responsive to the changing landscape of higher education.



RECOMMENDATION

Build a cohesive national OER research infrastructure.

Reducing fragmentation requires a coordinated research framework. Create a common, rigorous case study methodology that researchers can leverage to improve the replicability of studies on larger scales. These shared frameworks will support cumulative findings and enable stronger state and system decision-making.

02 Research Priority: Long-Term Sustainability and Institutional Support for Open Education

As open education initiatives mature, questions of sustainability have become more complex and urgent. Interview participants emphasized that the field must move beyond early adoption and short-term grant cycles to understand how OER programs persist over time. Many institutions now operate initiatives that are a decade old or more, yet face ongoing challenges related to funding stability, content maintenance, staffing, governance, and institutional commitment. As one participant noted, “Sustainability is a key issue, and research to make the argument for ongoing funding is needed.”

Participants also stressed that sustainability extends beyond individual programs and depends on how open education is supported through institutional policies, decision-making processes, and recognition systems. While OER adoption is often motivated by affordability, participants reported that long-term success requires clearer evidence of organizational value and stronger integration into institutional structures. The literature reinforces this view, showing that OER initiatives are most durable when they are embedded in strategic planning, budgeting, and quality assurance processes rather than relying on volunteer labor or individual champions.¹⁶ Together, these perspectives point to sustainability as a systems-level challenge shaped by funding, infrastructure, policy, and culture. The topics below reflect this interdependence, with each addressing a distinct but connected dimension of long-term viability.

KEY RESEARCH TOPICS

1. Sustainability of Mature OER Programs.

This topic focuses on how OER initiatives evolve after the start-up phase. Interview participants emphasized the need to study programs that have moved beyond pilots and now face long-term operational pressures. Rather than asking how OER programs begin, respondents urged research that examines how they adapt to leadership changes, shifting institutional priorities, and constrained resources over time.

Participants highlighted governance structures, decision-making authority, and organizational positioning as key factors influencing program durability. The literature supports this emphasis, showing that OER initiatives are more resilient when openness is aligned with institutional strategy and routine operations.¹⁷ This line of research establishes the foundation for research maturity and the topics that follow, which examine the specific conditions that shape these trajectories.

2. Durable Funding Models. Participants identified funding as one of the most persistent barriers to long-term sustainability. Many OER initiatives continue to rely on short-term grants, pilot funding, or discretionary departmental support, which are often insufficient to sustain ongoing needs such as content updates, faculty incentives, and professional support roles.

Interviewees called for research that examines how OER initiatives are resourced over time, including cost structures, budgeting practices, and funding diversification. Existing

studies confirm that grant-dependent models are fragile and that recurring investment is critical for continuity.¹⁸ While this topic focuses on how OER is funded, participants emphasized that funding decisions are closely tied to evidence of institutional value.

3. Maintenance and Support Infrastructure.

Sustaining OER also depends on how materials are maintained and supported over time. Interview participants raised concerns about outdated content, unclear responsibility for revisions, and limited technical or editorial support once initial funding ends. These challenges are especially acute in disciplines where content changes frequently.

The literature similarly identifies maintenance as a central, yet often overlooked, determinant of long-term success.¹⁹ Researchers emphasize the importance of clear workflows, documentation, and ongoing professional support to ensure that OER remain accurate, accessible, and usable.²⁰ Participants described sustainability as contingent not only on funding, but on reliable infrastructure and shared stewardship across faculty and support staff.

4. Institutional Policy and Decision-making.

Participants emphasized that institutional policies and governance structures strongly influence whether OER initiatives persist or remain vulnerable. They expressed interest in understanding how decisions to adopt and support OER are made, including the roles of faculty, administrators, libraries, teaching and learning centers, and external partners.

Respondents noted that OER efforts are more likely to endure when openness is integrated

into formal policies, workload expectations, and planning processes. Research supports this view, showing that policy alignment can reduce reliance on individual advocates and enable more stable implementation.²¹ This topic examines the broader policy environment that shapes OER sustainability, while the next section focuses on a specific and recurring policy challenge: academic recognition.

5. Recognition Structures and Academic Reward Systems. Misalignment between OER work and academic reward systems emerged as a distinct sustainability concern. Interview participants described tenure and promotion structures that prioritize traditional scholarly outputs and provide limited recognition for OER development, even when those resources have substantial instructional impact.

Participants reported that this lack of recognition discourages faculty participation and places additional strain on those already engaged in open education work. The literature confirms that faculty are less likely to invest in OER when such work is not valued in evaluation processes.²² Research is needed to document alternative recognition models and examine how academic culture influences long-term faculty engagement with OER.

6. Institutional Benefits to Support Strategic Decision-making. Participants emphasized that sustaining OER requires stronger evidence of institutional-level benefits, not just student cost savings. Several noted that senior leaders and budget holders often require data demonstrating how OER supports priorities such as retention, completion, instructional quality, or operational efficiency.

While existing studies suggest potential organizational benefits, including improved access to course materials and increased instructional flexibility, these outcomes remain undermeasured.²³ Interviewees called for research that quantifies return on investment (ROI) and identifies which benefits most influence institutional decision-making. This evidence is critical for securing long-term funding and policy support.

7. Contextual and Sector-Specific Sustainability Challenges. Participants cautioned against one-size-fits-all sustainability models. They emphasized that OER initiatives operate within varied institutional types, disciplines, and sectors, each with distinct constraints and priorities. Respondents highlighted challenges in specialized and rapidly changing fields, as well as differences between community colleges, research universities, and career-focused institutions.

The literature similarly documents wide variability in OER implementation across contexts.²⁴ Research that accounts for these differences can support more effective, context-sensitive sustainability strategies and avoid overgeneralization.

8. OER as a Driver of Organizational and Cultural Change. Several participants noted that OER initiatives can influence institutional culture beyond resource adoption. They described open education as a catalyst for cross-departmental collaboration, instructional innovation, and changes in governance or professional practice.

Existing studies link OER to broader organizational shifts, including new pedagogical

approaches and stronger alignment with institutional missions.²⁵ Participants encouraged further research that examines how these cultural dynamics contribute to long-term sustainability and institutional resilience.

CONCLUSION

Long-term sustainability in open education depends on more than continued use of open materials. Interview participants emphasized that enduring OER initiatives require coordinated funding models, reliable maintenance infrastructure, supportive policies, appropriate recognition systems, and clear evidence of institutional value. The literature confirms that without these conditions, OER efforts risk remaining fragmented or dependent on individual champions.

Future research that examines how these elements interact can help institutions move from isolated projects to integrated, system-level approaches.

By focusing on sustainability as a shared organizational and policy challenge, the field can better support resilient open education ecosystems that continue to serve learners and educators over time.

RECOMMENDATION

Elevate practitioner and student perspectives and strengthen discipline-based engagement. Faculty, librarians, instructional designers, and students offer essential insight into how OER functions



in real learning environments, benefiting both institutions and state post-secondary affordability. Understanding the landscape of mature OER programs, their institutional benefits, and support structures to prioritize discipline-specific needs will deepen engagement and embed open practices within disciplinary cultures.

03 Research Priority: Intersection of Open Education and Artificial Intelligence

Artificial intelligence (AI) has become one of the most transformative forces shaping teaching, learning, and knowledge creation. While there are a myriad of questions for how AI will function across the post-secondary sector, this agenda focuses on its intersections with open education. For the open education community — already navigating questions of funding, sustainability, and the evolving role of learning resources — the rapid emergence of generative AI presents both significant opportunity and substantial challenge. Interview participants described AI as a driver of acceleration and uncertainty, with direct implications for a national research agenda for open education.

Tlili and Burgos argue that AI is positioned to reshape open education by transforming how OER are created, discovered, personalized, and assessed.²⁶ AI-enabled tagging, recommendation systems, metadata generation, learner modeling, and adaptive feedback may reduce longstanding barriers to OER adoption and enable more dynamic, data-informed learning environments. At the same time, these authors caution that combining AI and openness is “a blessing and a curse,” raising risks related to bias, data privacy, cross-cultural application, and uneven impacts across institutions and student populations.²⁷ Panke similarly suggests that open education’s collaborative and publicly shared practices can serve as a stabilizing force as educators respond to AI-driven change.²⁸

Across interviews, participants described this period as a pivotal moment for open education.

They noted that AI is accelerating debates about the field’s identity and purpose while exposing fragmentation and uneven adoption. Several emphasized that research must identify principles that cut across emerging divides, as AI reshapes not only technical possibilities but also core assumptions about openness, access, and the role of education.

The intersection of AI and open education represents more than a technological shift — it is a defining opening for the future of the field. AI has the potential to accelerate the creation and localization of OER, expand access to learning support, and enable new forms of open pedagogy at scale. At the same time, it raises complex questions about ethics, governance, sustainability, ownership, and cultural responsiveness. Evidence-based research will be essential to help institutions, policymakers, and practitioners navigate this evolving landscape while protecting and advancing the core principles of open education.

The increasing use of artificial intelligence systems is reshaping how students seek information and how educators design learning and assessment. These dynamics can no longer be examined in isolation. Research is needed that considers student behavior, instructional design, assessment practices, and resource use together to understand how AI aligns with, or challenges, the values of open education.

The sections that follow draw on interview findings to identify the most pressing research needs at this intersection, highlighting where

AI is already influencing open education, where critical uncertainties remain, and where targeted inquiry could provide the greatest value.

KEY RESEARCH TOPICS

1. AI, Open Pedagogy, and Student Learning Behaviors. Interview participants emphasized the need to understand how artificial intelligence is reshaping both instructional design and student learning behaviors in open education environments. Rather than treating pedagogy, assessment, and student behavior as separate domains, respondents described these dynamics as increasingly intertwined. As students turn to AI tools for explanations, feedback, and problem-solving, long-standing assumptions about how learners engage with OER, instructors, and course materials require re-examination.

Participants expressed interest in research examining how AI can support open pedagogical practices, including personalized learning, metacognitive engagement, and alternative approaches to assessment. Several described early experimentations with AI-powered tutoring, generative content, and chat-based learning support. One participant noted, “If there are ways that AI can help with different aspects of assessment, that’s a new area that’s not been really researched at all.” At the same time, respondents raised concerns about academic integrity and assignment design, observing that AI tools can easily produce acceptable responses to formulaic prompts. These concerns have renewed interest in authentic assessment and open pedagogy that emphasizes process, reflection, and context-specific work.

Stakeholders also described clear shifts in how students seek and use information. Many reported that students increasingly consult AI tools rather than textbooks or even OER to ask questions or clarify concepts. This behavior challenges assumptions about the centrality of textbooks, open or commercial, in students’ learning workflows. Participants emphasized the need for research that documents students’ actual practices, including how they use AI as tutors, paraphraser, or substitutes for instructor explanations, and how these practices vary by access to technology, digital literacy, and course design.

Several interviewees suggested that courses intentionally designed around OER, open pedagogy, and Universal Design for Learning may shape student AI use in more productive ways. One participant hypothesized that “homegrown, context-specific classes built around OER” could discourage inappropriate AI use while supporting authentic engagement. Research is needed to examine when AI enhances learning in open environments, when it undermines it, and how faculty can design assignments and assessments that remain aligned with open education values.

As AI becomes more embedded in students’ learning habits, OER may increasingly function as source material for AI systems, rather than as the primary interface learners engage with directly. Understanding this shift is critical for determining how OER should be designed, positioned, and assessed within evolving learning ecosystems.

2. Ethics, Access, and the Risk of AI Increasing or Reducing Inequities. Ethical concerns were mentioned frequently across interviews. Respondents expressed concern

about sustainability, data privacy, corporate ownership of AI tools, and the risk that AI could widen existing inequities in education.

The need for AI that is open, transparent, accessible, non-proprietary, and aligned with open education principles, emerged as a high priority for open education stakeholders. Interviewees questioned whether generative AI aligns with or undermines the values that undergird the open education movement. They noted that while corporate AI systems benefit from ingesting open materials, the benefits to learners and institutions are far less clear.

One interview participant asked whether the widespread use of OER in AI training might constitute a societal contribution: “Could we say that the work we’re doing with open (education) is a benefit to society because the open materials are being crawled by AI models, and the truth is distributed through the chatbots somehow?”

This theme signals a need for research that focuses explicitly on the alignment between AI and open education values, particularly around ethics, transparency, and access.

3. AI, OER Sustainability, and Shifts in the Publishing Landscape. A major concern expressed by respondents is the potential impact of AI on OER sustainability models. Interviewees expressed concern about new financial structures, AI-generated content, and publishing partnerships that may blur the distinction between open and commercial materials. This complicates longstanding arguments about cost savings, a traditional cornerstone of OER advocacy.

Participants stressed that OER impact may become harder to measure in a world where AI-generated materials mediate access and where publishers integrate open content into proprietary ecosystems. These developments raise critical questions about ownership, discoverability, and transparency. Research is needed to understand whether AI strengthens or undermines the economic logic of OER, and to identify new sustainability strategies if traditional arguments lose traction.

CONCLUSION

The intersection of open education and artificial intelligence is one of the most consequential frontiers for the field. As AI reshapes learning environments, assessment practices, resource ecosystems, and institutional economics, open education must reassess its strategies, values, and research priorities. Amid the enthusiasm and concern about AI, one sentiment appeared consistently across interviews: the need for intentional, rigorous, and reflective research on the intersection of open education and AI. Interview participants expressed fatigue and uncertainty, describing the pace of AI innovation as overwhelming. As one shared: “As exhausted as I am with AI, a slow, thoughtful response is important. We need some real testing to see what is effective and what is not.”

As AI continues to evolve, the field has an opportunity, and a responsibility, to shape its trajectory in ways that advance the core values of open education. Stakeholders emphasized that the field should not embrace or reject AI reflexively. Rather, they called for experimentation grounded in open values, careful study of student outcomes, and strategic consideration



of long-term implications. Future research must prioritize measured, inquiry-driven approaches that help the field adapt wisely, rather than react hastily, to rapid technological change.

Interviewees made clear that AI will profoundly shape the future of OER and must be central to upcoming research efforts, “What might that intersection of open education and AI look like?” is not a theoretical question; it is an urgent one.

RECOMMENDATION

Advance research on emerging and complex issues shaping open education.

As AI and other technologies reshape teaching and learning, targeted research is needed to examine their implications for OER adoption, pedagogy, sustainability, and student behavior. Due to the field’s rapid pace of change, research that articulates the principles of open as they apply to AI, examines how AI can support open pedagogy, and centers practitioner experiences all have an important role in advancing the base of AI and OER research.

04 Research Priority: Evolution of Cost-Savings and Affordability Research in Open Education

Affordability has long been the most visible and widely understood benefit of open educational resources. Early OER research focused on documenting student cost savings and showing that open materials do not harm academic performance.²⁹ Interview participants affirmed that affordability remains a primary motivator for both faculty and students, and that reducing or eliminating textbook costs continues to drive adoption across institutions. At the same time, they noted that the field must begin to examine more complex questions about student behavior, decision-making, and the broader effects of high course material costs on academic choices and well-being.

The literature supports this shift. Studies consistently show that OER saves students significant money, often hundreds of dollars per course, and that day-one access can improve student readiness.³⁰ Research also shows that grades and withdrawal rates in OER-supported courses are comparable, and sometimes better, than those in courses using commercial textbooks.³¹ However, scholars are calling for more detailed analyses of how students navigate textbook costs, how they define “affordable,” and how these decisions shape their educational trajectories.

Interview participants described affordability as “inarguable and really important” from the student perspective, and noting that cost remains the issue students raise most often and the argument that resonates most with institutional leaders. Yet, they highlighted gaps

in understanding what students actually do when materials are unaffordable, whether they delay purchases, share resources, reduce course loads, or skip required texts entirely. Several participants emphasized the need for more precise, up-to-date cost estimates and stronger data on student decision-making related to cost-savings on OER. They framed this as the next stage of affordability research: building on an established evidence base to inform more targeted and effective interventions.

The subsections that follow outline key directions for advancing cost-savings and affordability research, reflecting a shift from proving that OER saves money to understanding how costs influence student behavior, course choices, and long-term educational outcomes.

KEY RESEARCH TOPICS

1. Affordability as an Enduring Core Motivator. Despite growing interest in open pedagogy, localization, and diversification of curricula, cost-savings remains the most persuasive and widely understood rationale for OER adoption. Interviewees suggested that faculty may appreciate innovative teaching practices, but they are often initially drawn to OER because of student financial need and the high cost of textbooks. They also noted that commercial publishers are increasingly adding interactive features and analytics that many instructors value, which may complicate affordability decisions when OER alternatives lack similar functionality.

Research consistently identifies cost savings as the primary benefit driving OER adoption.³² Studies have indicated that financial barriers can limit students' access to required materials, and that OER can address this by providing free, immediate access.³³ OER practitioners were clear that although there are fields that would benefit from greater exploratory research, affordability research should not be left behind.

2. Communicating and Leveraging

Mature Cost-savings Evidence. Participants characterized the evidence on OER-related cost savings as well-established. Rather than identifying a need for new lines of inquiry, interviewees emphasized continued monitoring of affordability metrics and more effective use of existing findings. The priority, they noted, is to communicate cost-savings evidence in ways that support policy decisions and justify sustained institutional investment. One interviewee described the “cost savings piece” as widely accepted and central to student support for open resources, underscoring the importance of continuing to emphasize this evidence in discussions with decision-makers.

The literature echoes this perspective. Numerous studies, including institutional reports and national initiatives, have documented aggregate savings and linked them to access and success outcomes.³⁴ Interviewees called for research that synthesizes and translates these findings for different audiences (students, faculty, administrators, and policymakers) so that cost-savings evidence can be used strategically in budget discussions, policy design, and advocacy efforts.

3. Student Textbook Decision-making and

Pain Points. Several respondents identified a major gap in open education research: while the field knows a great deal about aggregate cost savings, it knows relatively little about the specific decisions students make when faced with high textbook prices. Interviewees asked questions such as: Do students drop or avoid courses because of costs? Do they attempt to share materials or rely on outdated editions? How do these choices differ across disciplines, course levels, or types of institutions?

One participant noted that “our field badly needs data on average textbook costs (which we can then use to estimate OER savings)” and on how students navigate the full range of teaching and learning materials. They recommended research that combines surveys, interviews, purchasing data, and potentially bookstore or financial aid records to build a more nuanced picture of student behavior and pain points.

While many studies report students' appreciation for free materials, fewer examine the detailed decision pathways that lead students to use or forego required resources. Addressing this gap could strengthen affordability strategies by aligning them more closely with students' actual experiences.

4. Cost Metrics and Definitions of

Affordable. Interviewees also noted that commonly cited textbook cost metrics may be outdated or based on limited samples, and that a more systematic understanding of pricing across sectors and disciplines is needed. Several stakeholders suggested that research should revisit baseline cost figures, differentiate between required and optional

materials, and consider the cumulative burden of course materials over a program of study.

Relatedly, respondents questioned what should count as “affordable” in different contexts. They proposed that research explore how students, faculty, and institutions define affordability, and how those definitions vary by income level, financial aid access, or institutional mission. The literature indicates that while OER clearly reduces direct costs, there is limited work on thresholds or benchmarks that could guide policy.³⁵

5. Student Choices, Pathways, and Well-Being.

Finally, participants described a growing interest in understanding how cost influences broader academic and personal outcomes for students. They suggested that future studies should examine how textbook affordability affects course load decisions, major selection, time to completion, and students’ stress or well-being. Rather than measuring savings in isolation, interviewees encouraged research that situated costs within students’ overall educational journeys.

This direction is consistent with emerging work linking OER usage to retention and completion but goes further by urging researchers to investigate how financial relief from OER interacts with other factors shaping student pathways.³⁶ Longitudinal and mixed-methods designs could help reveal how cost pressures accumulate over time and how OER might alleviate those pressures in ways that extend beyond individual courses.

CONCLUSION

Cost-savings research remains foundational to the open education movement, but approaches to the topic have evolved in recent

years. Interview participants affirmed that affordability is still the most compelling reason many faculty and students embrace OER, and that the existing evidence base demonstrating savings and performance parity is strong. At the same time, they highlighted important gaps in understanding how students navigate textbook decisions, what “affordable” means in practice, and how cost dynamics influence academic choices and personal well-being.

Future research that builds on mature cost-savings evidence while exploring student behavior, updated pricing data, and longer-term impacts on educational pathways is essential. By deepening and refining the affordability narrative, the field can continue to make a persuasive case for OER, even as commercial models and instructional technologies change, and ensure that cost considerations remain a powerful, but more nuanced, component of the broader open education research agenda.

RECOMMENDATION

Support evidence-based policy and investment strategies aligned with the national research agenda. Research outcomes, such as the robust affordability research base, should directly inform policy and resource decisions, including funding models, faculty incentives, and statewide implementation strategies. Further investigation is needed into the cost metrics of affordability, setting clear definitions, as well as understanding student choices and motivations for choosing OER courses. Further, leveraging that research to communicate the robust benefits of OER to greater audiences will inform policy and institutional investments.

05 Research Priority: Discipline-Specific Approaches, Needs, and Practices in Open Education

As open education matures, OER adoption and open pedagogy³⁷ vary considerably across academic disciplines. Interview participants spoke about disciplinary culture shaping whether faculty view OER as legitimate, relevant, or feasible. They noted that although open practices exist across fields, from the humanities to STEM to career and technical programs, there is limited systematic research on how disciplinary norms, pedagogical approaches, and curricular structures influence OER use. Participants said that discipline-specific studies could clarify these differences, support more targeted professional development, and deepen faculty engagement by situating open practices within familiar scholarly traditions.

Research indicates that open pedagogy is more common in fields with traditions of student-authored knowledge or collaborative learning such as the social sciences, while STEM and technical areas face challenges related to problem sets, lab materials, and rapidly changing content.³⁸ Studies highlight uneven OER availability, particularly in specialized technical fields or upper-division courses where open textbooks remain scarce.³⁹ Yet, few studies have conducted cross-disciplinary comparisons or examined how disciplinary expectations shape material development, adoption, adaptation, and pedagogy.

Across interviews, participants emphasized the need to understand how faculty in different fields perceive open practices and what drives disciplinary differences in enthusiasm, skepticism, or implementation. They also stressed the

importance of sharing discipline-specific findings at conferences and venues, where faculty are more likely to learn from peers with similar contexts. As one participant noted, “People are doing it in whatever your discipline is... you just don’t see how it’s relevant for your class.”

The subsections below outline the most pressing discipline-specific research needs identified across interviews, underscoring the importance of studying open practices within the contexts, cultures, and pedagogical traditions of different academic fields.

KEY RESEARCH TOPICS

1. Open Practices Across Disciplines.

Interviewees argued that faculty often view OER and open pedagogy as practices that fit some disciplines better than others. For example, humanities instructors may readily embrace student-authored or collaborative knowledge creation, while faculty in engineering, chemistry, or business may see open pedagogy as misaligned with their assessment structures or accreditation frameworks. Respondents expressed interest in research that maps how disciplinary norms, such as laboratory instruction, case-based teaching, writing-intensive coursework, or professional competencies shape the use of OER and open pedagogical strategies.

Recent studies suggest disciplinary context influences both the types of OER available and the pedagogical strategies that can be effectively implemented, but investigation into what might support these fields is sparse.⁴⁰

Interviewees urged systematic comparisons across sectors and disciplines to identify patterns, barriers, and areas of opportunity.

2. OER Availability in Technical, Applied, and

Underresourced Fields. A recurring concern among interview participants was the limited availability of high-quality open textbooks and ancillary materials in technical fields such as engineering, computer science, nursing, and career and technical education. Several open education stakeholders described this as a major barrier to adoption and highlighted the need for research that identifies priority content gaps, analyzes platform usability for technical subjects, and explores collaborative design features that could better support specialized materials. While some of these fields are rapidly evolving, creating barriers to updated OER materials that meet contemporary needs, others are under-addressed in OER creation.

The literature indicates that disciplines with rapidly evolving content or complex problem sets often face unique challenges in developing and maintaining relevant OER.⁴¹ Future research must not only catalog gaps but also investigate sustainable strategies that have been implemented through policy, such as consortia authorship models, open problem banks, or discipline-specific repository design, that could expand access in these areas.

3. Localization, Adaptation, and

Customization of OER. Participants consistently highlighted the need for research into how instructors adapt OER to fit their unique teaching contexts. Several expressed interest in studies examining how faculty localize materials, diversify examples, modify

assignments, or redesign learning activities to better align with their disciplinary pedagogy.

One interviewee noted the value of “more space to talk about how faculty specifically localize or diversify OER to fit their particular classes.” Others mentioned research approaches such as classroom-based case studies, comparative analyses between adapted and unadapted OER, and investigations of how collaborative authoring tools support discipline-specific customization.

Findings from the existing literature point to the importance of adaptation as a core value proposition of OER and a site of significant pedagogical innovation.⁴² Systematic research on adaptation practices could help faculty see how open materials can be tailored to the nuances of their field.

4. Cross-disciplinary Comparative Studies.

Finally, interviewees expressed strong interest in research that compares OER and open pedagogy practices across disciplines to identify common patterns and significant differences. Such studies could illuminate how pedagogical traditions, accreditation requirements, instructional modalities, and labor expectations shape the adoption and implementation of open practices.

The literature suggests that cross-disciplinary analyses can help the field develop more nuanced frameworks for understanding OER adoption and for designing interventions that resonate with different faculty groups.⁴³ Interviewees proposed that comparative studies could reveal transferable practices as well as discipline-specific barriers that require tailored solutions.

CONCLUSION

Discipline-specific research represents an essential next stage in strengthening the evidence base for open education. Interview participants highlighted that faculty often judge the relevance of OER and open pedagogy through the lens of their disciplinary traditions, making it crucial to understand how open practices unfold within specific fields. The literature indicates that while compelling examples exist, systematic studies remain limited.

Future research that examines disciplinary differences, expands OER availability in fast-changing fields, analyzes faculty adaptation practices, and leverages discipline-specific dissemination channels will deepen the field's understanding of how open education is enacted across the academic landscape.

By situating open practices within distinct disciplines, researchers can help institutions design more targeted supports and foster broader, more sustained engagement among faculty.

RECOMMENDATION

Strengthen discipline-based engagement.

Research how disciplinary fields and open pedagogy are either aligned or create friction with one another, inclusive of the OER that supports technical and applied education fields. Prioritize discipline-specific needs and how faculty in those fields adapt OER in their context to best serve their students and courses. Take a greater cross-disciplinary approach to study the effects of OER on student course taking and success behaviors to understand the applications of OER across campuses.

06 Research Priority: Research Collaboration and Shared Infrastructure in Open Education

The open education movement has reached a moment where the quality, credibility, and strategic impact of its research increasingly depend on collaboration. Interview participants described a field rich in data, experienced researchers, and engaged practitioners, yet constrained by limited coordination. They pointed to a fragmented research landscape marked by parallel efforts, limited data sharing, and few mechanisms for aligning priorities across institutions and regions. Participants emphasized that collaboration must become a core focus of a national research agenda and expressed optimism that shared research infrastructure, cross-institutional partnerships, and coordinated leadership could significantly strengthen the field. Several identified established field-level organizations, including the Open Education Association, as well positioned to support convening, alignment, and knowledge exchange across the open education research community.

The literature reinforces these observations. Studies of OER implementation highlight the need for coordinated frameworks, clearer methodological standards, and cross-contextual collaboration to advance the field.⁴⁴ Weller notes that open education research is often highly localized, producing isolated case studies rather than generalizable insights.⁴⁵ Similarly, Tlili and Burgos argue that the field must adopt more systematic and collaborative approaches to tackle emerging challenges such as AI integration and sustainability.⁴⁶ International networks such as ROER4D and GO-GN demonstrate the potential of collaborative

structures, but these efforts remain unevenly connected and primarily global rather than national. Together, the literature and interview findings reveal a strong need for coordinated research that leverages shared data, harmonized methodologies, and cross-institutional inquiry.

Interview participants described collaboration not as an optional enhancement but as a foundational requirement for the next phase of open education research. Many voiced frustration about duplicate studies, unused datasets, and siloed research groups “that never talk to each other.” Others noted that some of the largest and richest datasets, those produced by Bay View Analytics, Ithaka S+R, state initiatives, or statewide OER programs, are rarely integrated into cumulative, multi-institutional analyses. Participants called for a shift from isolated project-by-project efforts toward shared strategic priorities, common infrastructures, and collaborative research designs capable of addressing large-scale questions.

The subsections below outline the most pressing research collaboration needs identified across interviews. Together, they signal an opportunity to build a national research agenda that emphasizes coordination, shared infrastructure, and collective impact.

KEY RESEARCH STRATEGIES

1. Address Fragmentation and Build Shared Research Infrastructure. Stakeholders frequently expressed frustration with the fragmented state of open education

research. Participants described “pockets of research folks” working independently, despite shared goals and funding. As one participant noted, “There seem to be a lot of different people talking about research... the DOERS group is talking about research, the GO-GN folks, the OER Research Fellows... but those results will never talk to each other.”

Interviewees also mentioned that while multiple organizations host OER-related datasets, these datasets remain largely disconnected. One participant noted that some of the most robust datasets in the field “have been completely untapped.”

This fragmentation prevents researchers from building cumulative knowledge and limits the field’s ability to produce rigorous, scalable evidence. As another participant observed, “we have so many pockets of people doing very similar things... it feels counterproductive.” The field does not lack data, it lacks integration. A nationwide research agenda offers an opportunity to create coordination mechanisms that connect existing datasets, reduce duplication, and support shared research priorities. Stakeholders clearly desire a more unified ecosystem where researchers can draw from common data sources, collaborate across institutions, and contribute to a coherent body of evidence about OER’s effectiveness and impact.

2. Scale Up for Cross-institutional, Longitudinal, and Big-data Research.

Participants emphasized the need to move beyond small-scale, single-institution studies, noting that narrow samples limit generalizability. One interviewee said, “I hope that there can be

some more big-data approaches... being able to look at data cross-institution, bigger-scale ways.”

Others emphasized the need for cleaner, more coordinated datasets capable of supporting robust claims related to long-term student success, patterns in OER adoption, and institutional outcomes across multiple contexts. One stakeholder said, “Some of those sorts of things could be really informative, being able to say not just one semester, but a fairly longitudinal period.”

This desire for larger datasets reflects a maturation of the field and a perceived need to move away from exploratory studies toward research that can inform policy, funding, and system-level strategy, answering questions such as:

- ▶ What long-term effects does OER adoption have on student outcomes and degree completion?
- ▶ How does OER use vary across institutional types, modalities, and disciplines?
- ▶ What systemic barriers slow OER adoption and impact?
- ▶ What institutional policies or support structures predict successful implementation?

Stakeholders are ready for shared data infrastructures and multi-institutional research designs. A national research agenda can catalyze these efforts by offering methodological guidance, identifying priority datasets, and supporting cross-institutional partnerships.

3. Expand Collaboration Models: Structures, Partnerships, and Innovation. Stakeholders emphasized the need to explore new models



of collaboration beyond traditional research groups or siloed institutional efforts. Interviewees expressed interest in coordinated structures that support shared projects, pooled data, and collective strategy across institutions or sectors. They highlighted the value of cross-agency collaboration, consortia work, and partnerships that intentionally span sectors, public and private institutions, state agencies, foundations, library networks, and research centers. Such collaborations can help coordinate priorities, align incentives, and reduce duplication across organizations pursuing parallel research efforts.

The field is ready to adopt collaboration models that mirror its values: openness, sharing, and co-creation. Researching collaboration as a learned and adaptive practice could help the field design more effective and sustainable structures for large-scale research.

4. Advance Research on OER Implementation Across Multiple Institutional Types.

Interviewees described a growing body of research examining how OER programs evolve across different institutional types, such as community colleges, career and technical programs, private institutions, regional universities, and research 1 and 2 universities. This research often involves mapping program development, identifying implementation gaps, and supporting statewide planning.

For many stakeholders, cross-sector and cross-institutional partnerships, particularly those involving state agencies, represent one of the most promising areas for collaborative research. These partnerships help ensure that OER implementation is understood within the

contexts of different organizational structures, student populations, and policy environments.

This theme highlights the need for a comprehensive understanding of how OER adoption and impact vary across the postsecondary landscape. A national research agenda could help align these efforts, promote shared methodologies, and encourage comparative studies that examine how institutional context shapes implementation and student outcomes.

CONCLUSION

As one participant summarized, “There is a ton of talent... pull them together and we can do wonders.”

A national research agenda must focus on building the collaborative infrastructure required to move beyond fragmented efforts and isolated studies. By strengthening collective research capacity, the field can generate insights that meaningfully influence policy, institutional strategy, and funding priorities, while advancing the core values of openness and shared knowledge.

The open education field is poised for a new era of research that is cumulative, coordinated, and methodologically robust, work that leverages shared data, cross-institutional partnerships, interdisciplinary perspectives, and national-scale insights.



RECOMMENDATION

Strengthen collaboration across regions, systems, and sectors. Coordinated research efforts across open stakeholder groups can reduce duplication, create shared learning, and support scalable models suited to multiple institutional contexts. Articulating the value of open education and its research base to audiences in order to support greater understanding of the benefits of open education.

RECOMMENDATIONS

The following recommendations translate the priorities identified through NCOER's nationwide research agenda into strategic actions. These recommendations are designed to guide coordinated research, investment, and policy development across states, regions, and institutions.

- ▶ **Build a cohesive national OER research infrastructure.** Reducing fragmentation requires a coordinated national data and research framework. Shared methodologies, connected data systems, and accessible evidence repositories will support cumulative findings and enable stronger state and system decision-making.
- ▶ **Elevate practitioner and student perspectives and strengthen discipline-based engagement.** Faculty, librarians, instructional designers, and students offer essential insight into how OER functions in real learning environments. Prioritizing discipline-specific needs, adaptation practices, and students' lived experiences, and supporting dissemination through field-based venues, will deepen engagement and embed open practices within disciplinary cultures.
- ▶ **Strengthen collaboration across regions, systems, and sectors.** NCOER's cross-regional structure positions it to lead multi-state collaboration. Coordinated research efforts across the regional higher education compacts and other open stakeholder groups can reduce duplication, create shared learning, and support scalable models suited to multiple institutional contexts.
- ▶ **Advance research on emerging and complex issues shaping open education.** As AI and other technologies reshape teaching and learning, targeted research is needed to examine their implications for OER adoption, pedagogy, sustainability, and student behavior. Forward-looking studies will help policymakers anticipate and respond to rapid shifts in the educational landscape.
- ▶ **Support evidence-based policy and investment strategies aligned with the national research agenda.** Research outcomes should directly inform policy and resource decisions, including funding models, faculty incentives, and statewide implementation strategies. Using the national agenda to guide investment will ensure long-term coherence and impact at state, regional, and institutional levels.
- ▶ **Evaluate the impact of the Open Education Research Agenda.** Conduct a systematic review of this open education research agenda to assess whether it influenced research activity, guided funding decisions, or shaped scholarly priorities. Interviewees noted uncertainty about whether prior agendas "ever actually... did a follow-up to see whether those research agendas were helpful" or whether they led to research in the intended areas. Given that OER is a "broad world," evaluating the effectiveness, limitations, and outcomes of previous agendas can help ensure the national research agenda is actionable, realistic, and positioned to generate meaningful impact.

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APPENDIX I: METHODS

To develop the national research agenda, the evaluation team used a mixed-methods research design that combined survey data with in-depth qualitative interviews. This approach allowed the team to gather broad input from the open education community while also generating deeper insights into participants' experiences, priorities, and perspectives. Quantitative data from the national survey were used to identify patterns in respondents' roles, institutional contexts, and research interests, while qualitative data from interviews provided richer contextual understanding of the themes identified by the Ambroso Research and Evaluation Consulting (AREC) team. Together, these data sources informed a comprehensive and field-informed set of research priorities. Table 2 presents the participant counts for each data source used in the development of the national research agenda.

Table 2. Data Collection Participant Counts

DATA SOURCE	NUMBER OF PARTICIPANTS
Open education research agenda survey	126
Open education research agenda interviews	15

Data collection occurred in two phases: an online survey distributed nationally and a series of follow-up interviews with respondents who volunteered to participate. The survey asked participants to identify pressing research needs, gaps in existing evidence, and emerging opportunities for the field. Interview sessions explored these topics in greater depth, allowing participants to elaborate on their perspectives, describe institutional challenges, and reflect on the future direction of open education research. All qualitative data were coded and analyzed using an iterative process to identify themes across respondents, ensuring that findings reflect the diversity of experiences represented in the sample.

Participants

Survey and interview participants were recruited to ensure broad perspectives from across the open education community in the United States. The recruitment process was developed by the National Consortium for Open Educational Resources (NCOER) in collaboration with AREC to engage individuals with experience and leadership in open education and open educational resources (OER). The goal was to capture perspectives from a wide range of practitioners, administrators, faculty, and policymakers involved in the implementation, research, and governance of open education initiatives.

Recruitment was conducted through established communication networks in the open education field. Invitations to participate in the national survey were distributed through the Community College Consortium for Open Educational Resources (CCCOER) listserv, the Driving OER Sustainability for Student Success (DOERS) network, the OER West and Midwest OER regional consortia, and the Educational Technology Cooperative Members and Open Education Capacity Building Grant lists. These networks represent a broad range of institutional and system-level actors working to advance OER adoption, policy, and practice across higher education.

This recruitment strategy was designed to capture differences in geography, institutional type, and professional background. Participants represented two- and four-year colleges and universities (both public and private), as well as nonprofit organizations, libraries, and

government agencies supporting postsecondary education. Respondents identified their professional roles, including administrators, faculty members, librarians, instructional designers, technologists, and policymakers. Participation was voluntary, uncompensated, and anonymous. Data were collected and stored securely by AREC, and individual responses were not shared with NCOER. All analysis was conducted on aggregated data.

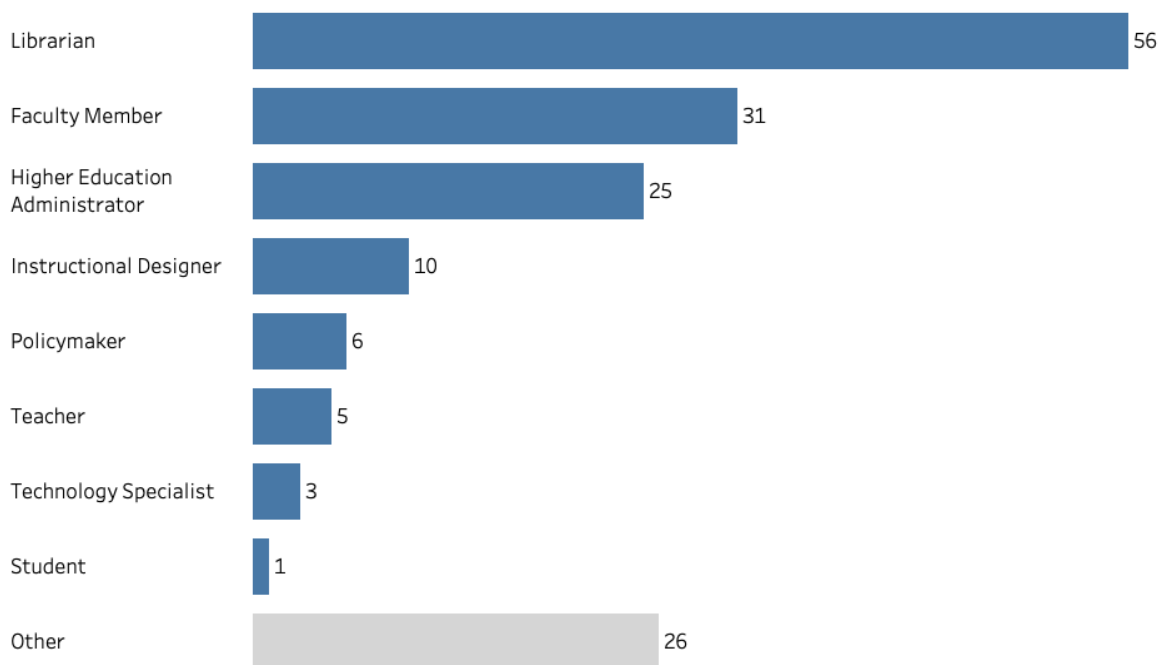
At the end of the survey, respondents were given the option to participate in a follow-up interview. Those who expressed interest were contacted by AREC to schedule a virtual session. Interviews lasted approximately 30 minutes. These sessions provided an opportunity to explore themes identified in the survey in greater depth and to gather qualitative insights from experienced practitioners. Participation was voluntary, and confidentiality was maintained throughout. Sessions were recorded only for note-taking purposes, and any quotes used in reporting were anonymized.

This multi-stage recruitment process resulted in a participant group that reflected the breadth of the open education ecosystem in higher education. Participants represented institutions and organizations at different stages of OER adoption and policy development, ensuring that the resulting research agenda draws from a wide range of experiences, perspectives, and regional contexts. The combination of survey and interview data provides a strong, field-informed foundation for identifying national priorities in open education research.

SURVEY PARTICIPANTS

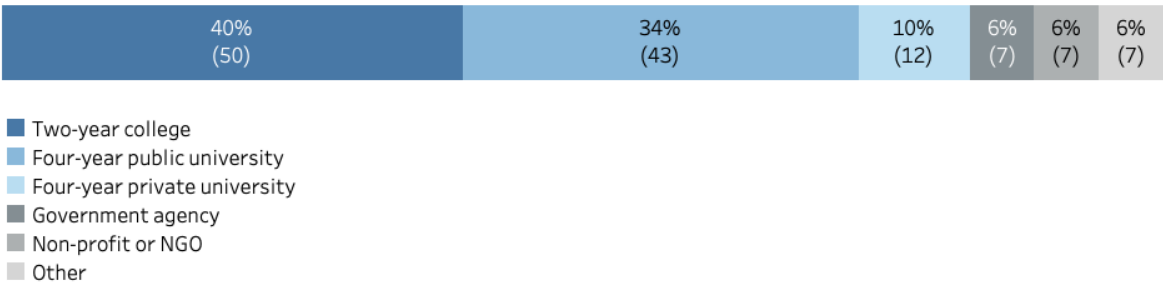
Survey data suggest most respondents are involved in supporting or leading educational initiatives within higher education (see Figure 1). The largest group of participants identified as librarians (56 respondents), followed by faculty members (31) and higher education administrators (25). Smaller groups included instructional designers (10), policymakers (6), teachers (5), and technology specialists (3). An additional 26 respondents selected “other,” describing a wide range of roles such as OER coordinator, strategist, state-level project lead, and publishing manager.

Figure 1. Survey Participants’ Professional Roles



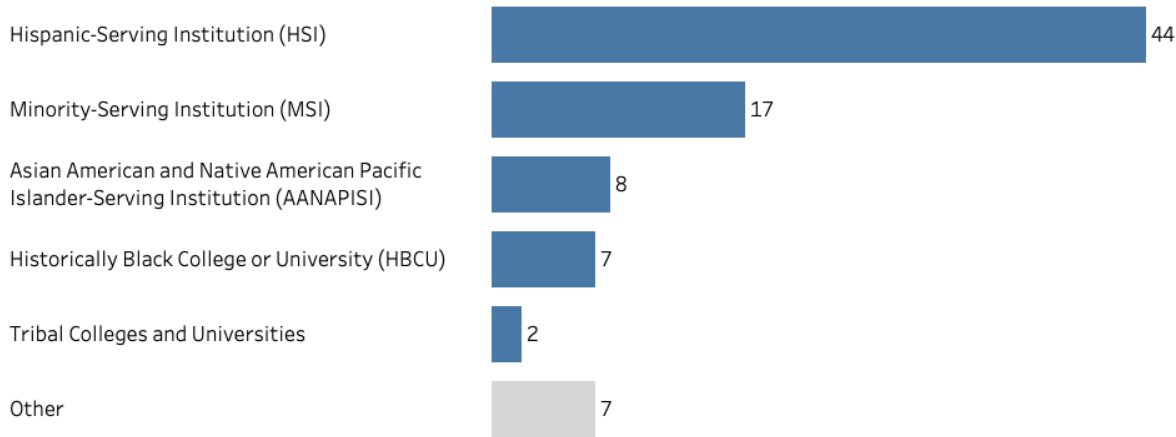
More than 80% of survey participants indicated they work in higher education institutions (see Figure 2). Respondents most commonly reported working in two-year colleges (40%) or four-year public universities (34%), followed by four-year private universities (10%). In open-ended comments, several participants described working across institutional systems or at the state or consortium level.

Figure 2. Survey Participants’ Institutional Affiliations



Among respondents affiliated with higher education institutions, many indicated their institution holds a federal designation (see Figure 3). The most frequently cited institutional designations were Hispanic-serving institution (44) and minority-serving institution (17).

Figure 3. Survey Participants’ Institutional Designations



More than half (55%) of survey respondents reported having experience with open education research. When asked to describe their research in open-ended responses, many survey respondents wrote about research that focuses on understanding student and faculty perceptions of open educational resources and practices. Others wrote about examining how OER adoption and open pedagogical practices influence student engagement, learning outcomes, retention, and success.



INTERVIEW PARTICIPANTS

A group of interview participants contributed to the qualitative component of this study. Interviewees represented a wide range of professional roles within the open education ecosystem, including librarians, faculty members, instructional designers, program coordinators, system-level leaders, and policymakers. Many participants served as institutional or regional leads for OER initiatives, providing firsthand insight into the implementation, management, and strategic development of open education efforts.

Interviewees came from multiple postsecondary sectors across the United States, including two-year community colleges, four-year public universities, four-year private institutions, polytechnic institutions, and statewide or system-level organizations. Several participants held positions in academic libraries or teaching and learning centers, while others worked in state agencies, professional associations, and research organizations supporting postsecondary education. This mix ensured representation from both institution-facing and system-facing perspectives.

Participants brought substantial experience in open education, with many having led OER adoption initiatives, faculty development efforts, or policy work at the institutional or state level. Several interviewees had specialized expertise in areas such as open pedagogy, OER policy development, statewide OER coordination, and research on student learning and faculty adoption behaviors. Others described current or ongoing research projects related to OER, including work on learning outcomes, discipline-

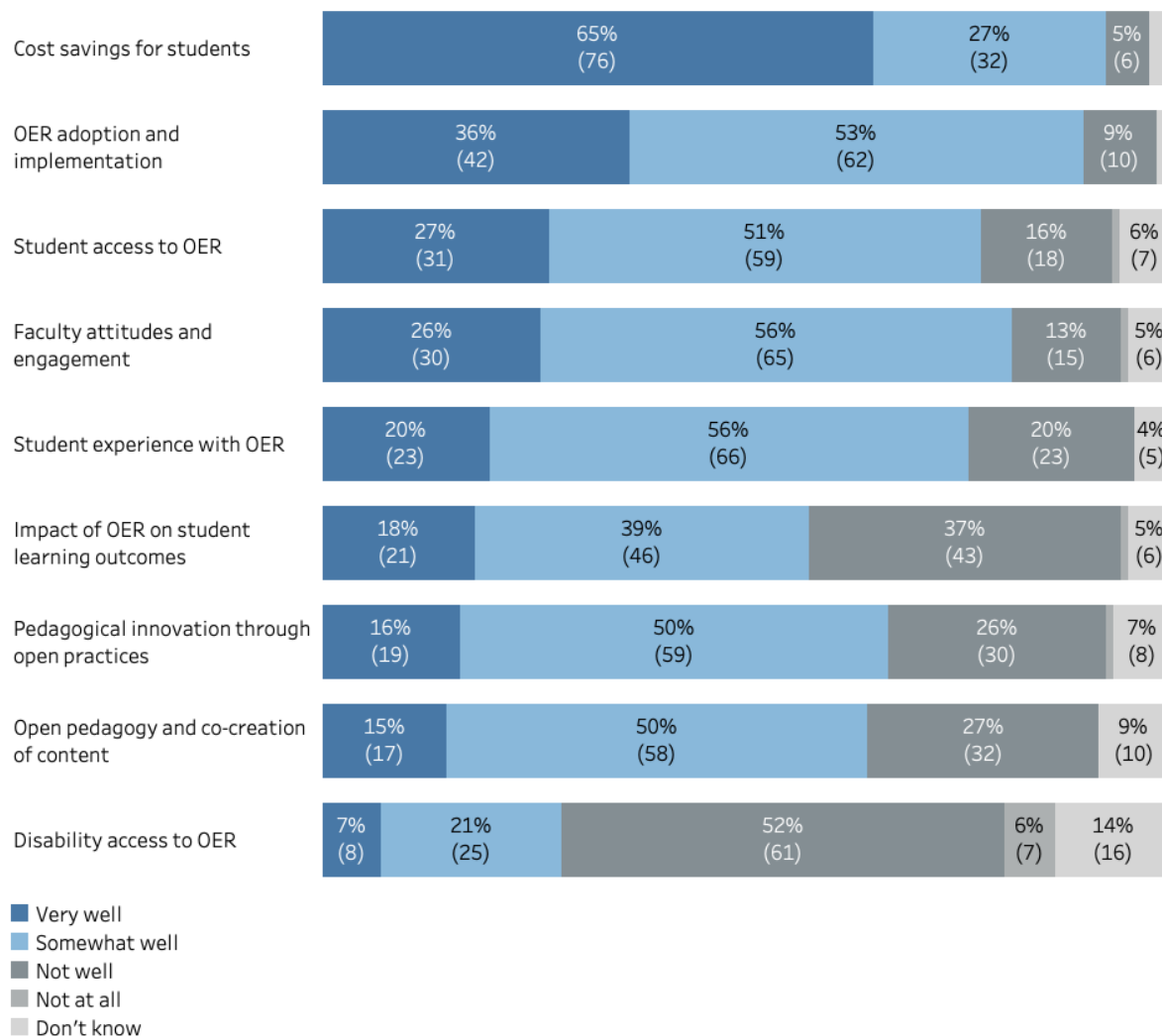
specific open resources, and the intersection of AI and open educational practices.

APPENDIX II: SURVEY FINDINGS

This section outlines the key themes that emerged from the national survey and interviews. It provides a high-level overview of how stakeholders view the current research landscape and sets the stage for the priorities presented in the report. The findings that follow draw on the combined insights from these data sources to illuminate how stakeholders assess the current evidence base. Survey responses reveal broad patterns in perceived strengths and limitations, while interview feedback adds nuance about emerging issues, persistent gaps, and areas where additional inquiry is most needed. Together, these perspectives highlight where the field has established meaningful evidence, where knowledge remains fragmented, and where further research would most effectively support the development of a coordinated national agenda.

Survey participants were asked to rate how well certain research topics were covered in the existing literature (see Figures 4 and 5). In the first set, respondents indicated research most strongly addresses cost savings for students (92% rated “very well” or “somewhat well”) and OER adoption and implementation (89% rated “very well” or “somewhat well”). Respondents also rated student access to OER, faculty attitudes and engagement, and student experience with OER highly. Areas receiving the lowest ratings included open pedagogy and co-creation of content (65% rated “very well” or “somewhat well”) and disability access to OER (28% rated “very well” or “somewhat well”).

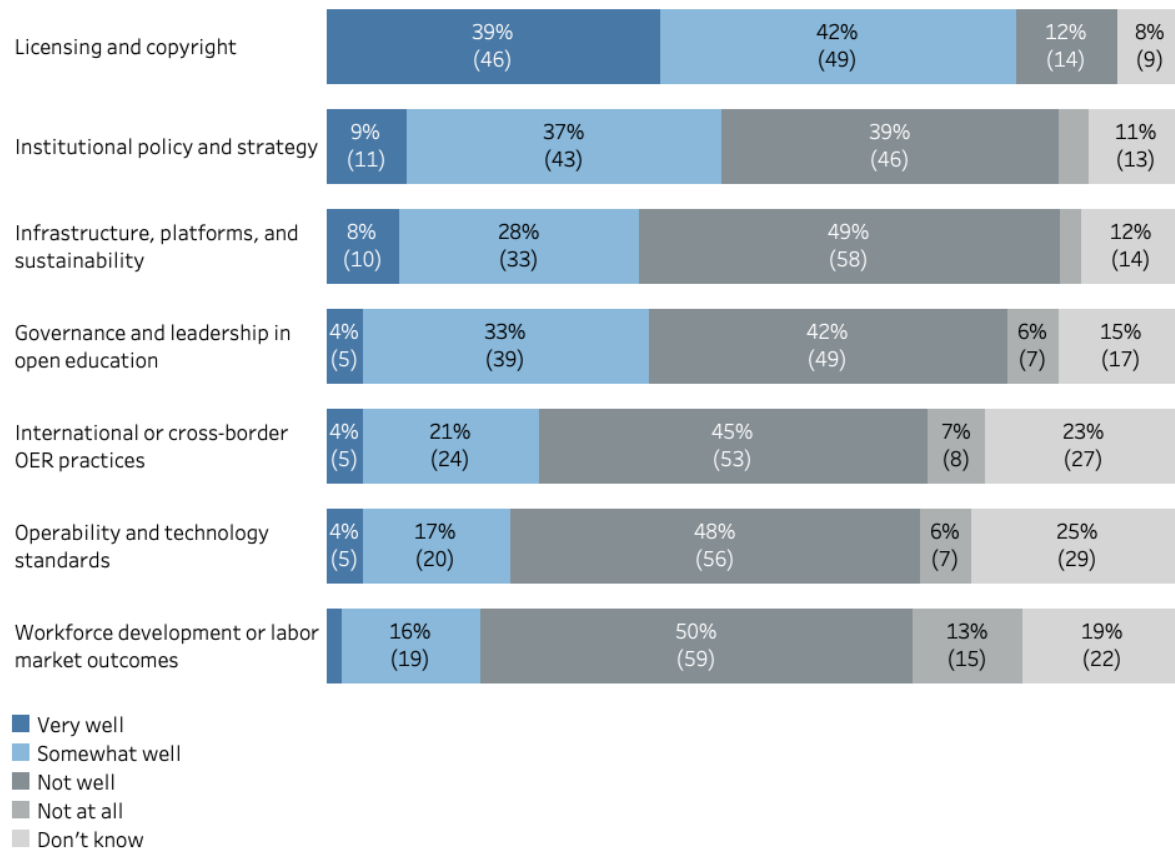
Figure 4. Research Coverage in the Existing Literature (Set 1)



In open-ended survey responses, stakeholders argued that OER's impact on student success must move beyond correlation. Respondents questioned the generalizability of existing studies and urged mixed-methods approaches that investigate causal impacts on retention and completion. Suggested directions included follow-ups to major prior studies and deeper exploration of OER accessibility for specific student populations, such as students with disabilities.

In the second set of topics, 81% of respondents indicated licensing and copyright was covered very well or somewhat well by current research. Other topics, such as operability and technology standards (21%) and workforce development or labor market outcomes (17%) were rated as less covered in the existing literature.

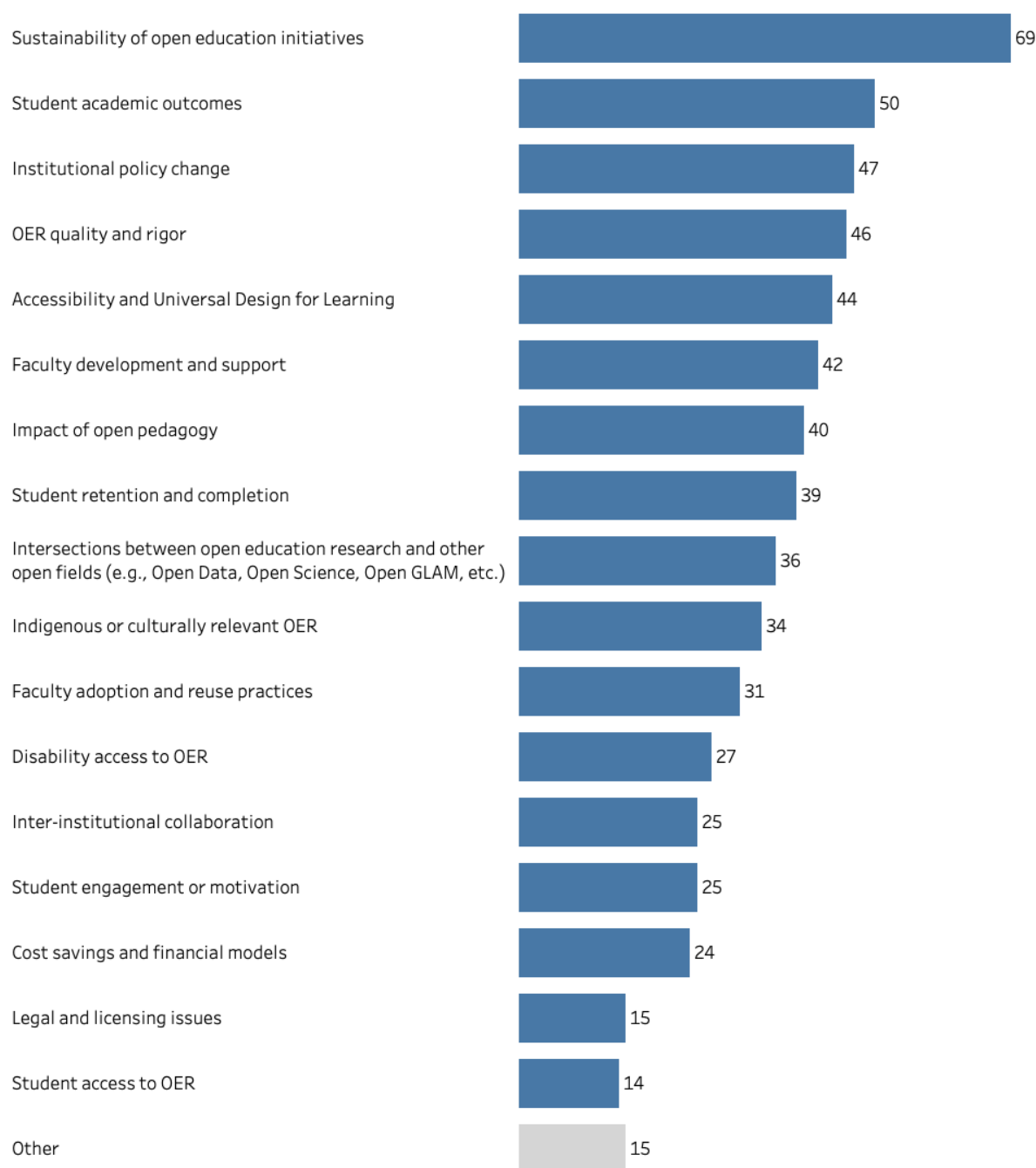
Figure 5. Research Coverage in the Existing Literature (Set 2)



Open-ended survey responses indicate the human side of OER adoption, faculty labor, recognition, and burnout, remains underexplored. Participants suggested more research is needed on how OER affects tenure and promotion, peer review, and faculty workload, in addition to research that highlights the emotional toll on advocates and the need to normalize open practices within academic cultures.

When asked to identify top priorities, of which they could select multiple, respondents most frequently selected sustainability of open education initiatives (69), student academic outcomes (50), institutional policy change (47), and OER quality and rigor (46, see Figure 6). Open-ended comments highlighted growing interest in the role of artificial intelligence in OER creation and use, as well as the need for research on long-term maintenance models for open materials.

Figure 6. Survey Respondents' Perspectives on Research Priorities in Open Education



In open-ended survey responses, stakeholders called for research into how generative artificial intelligence (AI) can support OER creation, including content generation, ancillary materials, and adaptive learning tools, while also surfacing concerns about academic integrity and the implications of AI for teaching and assessment. Respondents suggested AI will profoundly shape the future of OER and must be central to upcoming research and said research is needed to explore both its potential disruptive and

supportive roles. Another survey respondent requested research that quantifies institutional benefits to influence decision-makers and budget holders, suggesting that, without this, OER initiatives risk remaining marginal and underresourced.

Survey respondents were also asked to identify specific communities for future open education research (see Figure 7). Responses indicate future research should focus on faculty at underresourced institutions (72), students with disabilities (61), historically underrepresented students (61), and first-generation college students (48). Open-ended responses called for additional attention to incarcerated learners, learners in rural areas, parenting students, and workforce or CTE learners, underscoring the need to examine differences in access to instructional resources and support across learning environments.

Figure 7. Communities of Focus for Future Open Education Research

