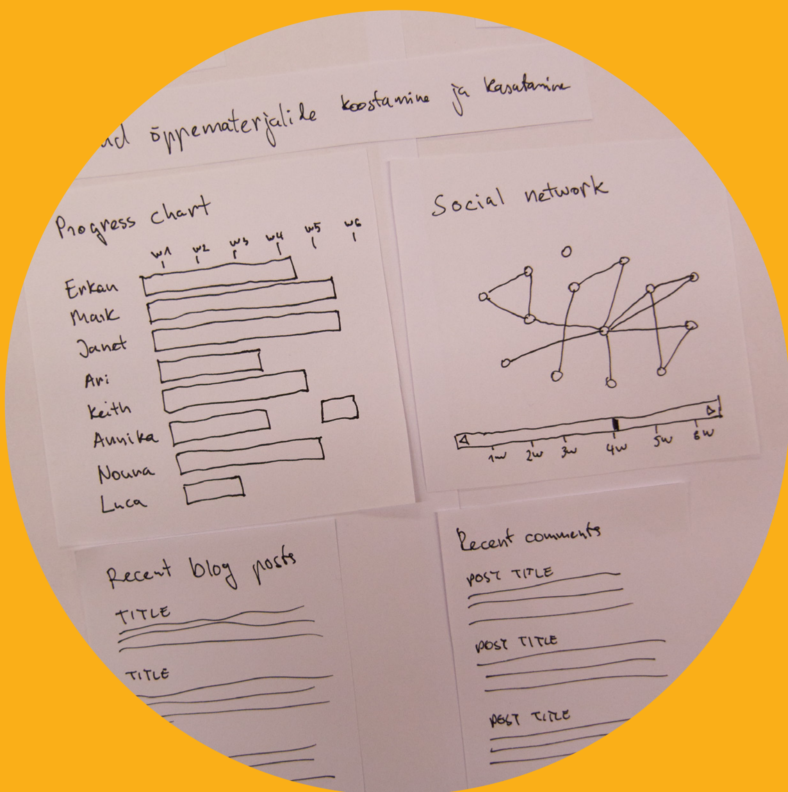
Department of Media

The Structure and Components for the Open Education Ecosystem

Constructive Design Research of Online Learning Tools

Hans Põldoja



Aalto University

DOCTORAL DISSERTATIONS

Aalto University publication series
DOCTORAL DISSERTATIONS 175/2016

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Constructive Design Research of Online Learning Tools

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Aalto University publication series
DOCTORAL DISSERTATIONS 175/2016

ISBN 978-952-60-6994-4 (printed)
ISBN 978-952-60-6993-7 (pdf)
ISSN-L 1799-4934
ISSN 1799-4934 (printed)
ISSN 1799-4942 (pdf)
http://urn.fi/URN:ISBN:978-952-60-6993-7

Unigrafia Oy
Helsinki 2016

Finland

441 697
Printed matter

A! **Aalto University**

Aalto University, P.O. Box 11000, FI-00076 Aalto www.aalto.fi

Abstract

Author
Hans Põldoja

Name of the doctoral dissertation
The Structure and Components for the Open Education Ecosystem

Publisher School of Arts, Design and Architecture

Unit Department of Media

Series Aalto University publication series DOCTORAL DISSERTATIONS 175/2016

Field of research New Media

Date of the defence 23 September 2016

Language English

☐ **Monograph** ☒ **Article dissertation** ☐ **Essay dissertation**

Abstract

This research studies the design of online learning tools for open education. The dissertation is based on five articles and design case studies that explore open education from different perspectives: open educational resources, open learning environments, and assessment of teachers' competencies. The underlying concept of the study is the open education ecosystem. The study explores the ways in which the design of online learning tools could benefit from the digital ecosystems approach. The design of online learning tools for open education presents wicked problems, that involve ill-defined requirements and contemplates the influence on and by the stakeholders and other components of the ecosystem. Firstly, to clarify the design challenges related to the open education ecosystem, this study summarizes a set of design challenges presented in design case studies. Secondly, it identifies and recommends a set of design patterns that address these design challenges. Finally, the study proposes the structure and components that are needed for the open education ecosystem.

Keywords open education, digital ecosystems, design patterns

ISBN (printed) 978-952-60-6994-4 **ISBN (pdf)** 978-952-60-6993-7

ISSN-L 1799-4934 **ISSN (printed)** 1799-4934 **ISSN (pdf)** 1799-4942

Location of publisher Helsinki **Location of printing** Helsinki **Year** 2016

Pages 208 **urn** http://urn.fi/URN:ISBN:978-952-60-6993-7

Acknowledgements

It is almost 13 years since I started my doctoral studies. A lot of people have helped me during this long way. First of all, I want to thank my supervisor Teemu Leinonen for inviting me to do my doctoral studies in Helsinki. Media Lab Helsinki was a great place to learn about design. Learning Environments group was more like a band than a traditional research group. In this environment, I found doing actual design work more engaging than writing a dissertation. Teemu never lost belief in me and helped me to get back on track with writing. His methodological guidance and detailed comments on the manuscript helped me to finalize the dissertation.

My thesis advisors Erik Duval and Paul Kahn have supported me in various phases of this work. Erik encouraged me to aim higher instead of going for quick wins. I would not have successfully completed my final publication without his encouragement and guidance. Sadly, he passed away in March 2016. Me and Teemu both learned a lot from him. Paul looked at my work from a different perspective and ensured that it is also relevant outside the technology-enhanced learning community.

I want to thank my pre-examiners Vladan Devedzic and Lisa Petrides for taking their time to review my work. Their feedback has helped me to refine the dissertation. I am also honored that Terry Anderson has accepted to act as opponent in my defense.

During my time in Helsinki I had a pleasure to work together with a number of talented doctoral students. We did several course projects together with Mariana Salgado. Andrea Botero has helped me with many things. Joanna Saad-Sulonen gave detailed feedback on the early version of my manuscript. With Nuno Correia we shared a common interest in music. Our doctoral program had a lot of freedom and flexibility. Lily Diaz and Mauri Kaipainen helped us with keeping our studies on track.

After my studies in Helsinki, I returned to the Centre for Educational Technology in Tallinn University. Here I have done several design projects and research publications together with Mart Laanpere, Terje Väljataga and Kairit Tammets. Terje and Kairit have inspired me not to give up my doctoral studies. I have also got help and feedback from Kai Pata and Tobias Ley.

Riina Vuorikari and Sebastian Fiedler have been good friends and research partners. It is always great to meet them and to discuss about learning, design, openness, and other topics.

Design ideas do not turn into software prototypes without developers. I have been lucky to work together with Pjotr Savitski, Jukka Purma, Tarmo Toikkanen, Meelis Mets, Vahur Rebas, and Aili Madisson. Priit Tammets has helped me with graphical design.

Antti Ellonen and Marjo Priha provided input for the PILOT project and my first publication in this dissertation. David Maxwell did language editing for my final publication and the dissertation. Sanna Tyyri-Pohjonen assisted me with questions related to publishing the dissertation.

My doctoral studies in Finland became possible with the support from the Kristjan Jaak Scholarship programme by the Archimedes Foundation. School of Digital Technologies in Tallinn University has supported my studies in various ways and provided me with flexible working conditions that allowed me to finalize my dissertation.

Writing a doctoral dissertation and life in general is not always fun. My good friends Tiina, Keit and Pirje have made me laugh and supported me during difficult moments.

Finally, I would like to thank my parents for their patience and support.

Thank You! Kiitos! Suur tänu!

Tallinn, August 2016
Hans Põldoja

Contents

List of Abbreviations

API	Application Programming Interface
CAI	Computer-Assisted Instruction
CC	Creative Commons
DLE	Digital Learning Ecosystem
ELES	E-learning Ecosystem
HTML	HyperText Markup Language
HTTP	Hypertext Transfer Protocol
ISTE	International Society for Technology in Education
LMS	Learning Management System
MOOC	Massive Open Online Course
NETS-T	National Educational Technology Standards for Teachers
OB	Open Badge
OECD	Organisation for Economic Co-operation and Development
OEE	Open Education Ecosystem
OEF	Open Education Framework
OER	Open Educational Resources
OPML	Outline Processor Markup Language
PILOT	Progressive Inquiry Learning Object Template
PLE	Personal Learning Environment
RSS	Rich Site Summary
SOA	Service-Oriented Architecture
TEL	Technology-Enhanced Learning
UNESCO	United Nations Educational, Scientific and Cultural Organization
URI	Uniform Resource Identifier

VLE	Virtual Learning Environment
WWW	World Wide Web

List of Publications

This dissertation is based on the following five publications that are referred to in the text as Publications 1 through 5:

1. Põldoja, H., Leinonen, T., Väljataga, T., Ellonen, A., & Priha, M. (2006). Progressive Inquiry Learning Object Templates (PILOT). *International Journal on E-Learning, 5*(1), 103–111.

2. Leinonen, T., Purma, J., Põldoja, H., & Toikkanen, T. (2010). Information Architecture and Design Solutions Scaffolding Authoring of Open Educational Resources. *IEEE Transactions on Learning Technologies, 3*(2), 116–128. http://doi.org/10.1109/TLT.2010.2

3. Põldoja, H., Duval, E., & Leinonen, T. (2016). Design and evaluation of an online tool for open learning with blogs. *Australasian Journal of Educational Technology, 32*(2), 64–81. http://dx.doi.org/10.14742/ajet.2450

4. Põldoja, H., & Väljataga, T. (2010). Externalization of a PLE: Conceptual Design of LeContract. In *The PLE 2010 Conference Proceedings*. Barcelona: Citilab. Retrieved from http://pleconference.citilab.eu/cas/wp-content/uploads/2010/06/ple2010_submission_68.pdf

5. Põldoja, H., Väljataga, T., Laanpere, M., & Tammets, K. (2014). Web-based self- and peer-assessment of teachers' digital competencies. *World Wide Web, 17*(2), 255–269. http://doi.org/10.1007/s11280-012-0176-2

Author's Contribution

Publication 1: Progressive Inquiry Learning Object Templates (PILOT)

The author was responsible for describing the design and development of PILOT's. Teemu Leinonen assisted with structuring the publication and formulating the research problems. Sections relating to the pedagogical foundations and research problems were written together.

Publication 2: Information Architecture and Design Solutions Scaffolding Authoring of Open Educational Resources

The author contributed mostly to the sections that described the design process and the implementation of design solutions in the LeMill software. The author also wrote the section related to the licensing of OER's, created the concept map of LeMill and made minor edits to other sections.

Publication 3: Design and evaluation of an online tool for open learning with blogs

The author was the main author of the publication. Co-authors assisted with formulating the research questions, planning the evaluation study and discussing the results of the evaluation.

Publication 4: Externalization of a PLE: Conceptual Design of LeContract

The author was responsible for structuring the publication, reporting the design process and presenting the conceptual design of LeContract.

Publication 5: Web-based self- and peer-assessment of teachers' digital competencies

The author wrote the sections on the design methodology, conceptual design, and software implementation of DigiMina. The author also contributed to the introduction, conclusions, and the validation study.

1. Introduction

Over the past 20 years we have witnessed how the use of the Web has made possible new educational practices, including both *open* and *personal* practices. These changes have taken place both at the institutional level and at the level of individual learners and educators. This dissertation investigates the design of online learning tools that enable teachers and learners to focus their practices on *openness*.

The first chapter introduces the research context, delimits the problem area, outlines the aims of the study, and establishes the research questions. This chapter also provides a short description of five design cases on which this study is built on and introduces the structure of the dissertation.

1.1 The Research Context

Online learning tools are described as tools that have been specifically designed for learning and are connected over a computer network, typically over the Internet. *Open education* refers to free and open access to education. Together with open source software, open access, and open content it belongs to a larger family of open movements that gained attention in the early 1960s. My dissertation studies five design projects of online services and learning tools that approach open education from different angles. This interdisciplinary study combines theories, methods and practices from four different areas: technology-enhanced learning, open education, digital ecosystems and design. Through technology-enhanced learning and open education it is also connected to educational science.

The first large scale initiatives of using computers in education date back to 1960s (Molnar, 1997). Over the years a number of terms such as computer-assisted instruction, computer-based education, computer-aided learning, educational technology, online learning, networked learning, and e-learning have been used when talking about the use of computers in learning and teaching. This dissertation uses technology-enhanced learning (TEL) as an umbrella term to refer to the support of any learning activity through technology. The term *technology-enhanced learning* came into use in late 1990s. Therefore it typically refers to the use of *digital technology* in learning (Chan et al., 2006). Conole, Scanlon, Mundin, and Farrow (2010) emphasize that TEL is a complex and highly interdisciplinary field that brings together researchers from social sciences (education, psychology), technology (computer science, information science) and design, as well as subject-matter experts. TEL research has a number of sub-areas that include computer-supported collaborative learning, improving practices of formal education, informal learning, interoperability of technological learning services, personalization of learning and others (Wild, Lefrere, Scott, & Naeve, 2013). TEL tools include both hardware (e.g. interactive whiteboards, handheld technologies) and software. Common types of TEL software are online learning services, virtual learning environments (VLE), authoring and delivery tools for learning content, collaboration tools, assessment tools, e-portfolios and others. My focus is on the design of web-based TEL software for open education. My special interest is in supporting open and personal approaches to learning.

Introducing technology to education is a complex process. Technological innovations must go hand in hand with social innovations. One of the social innovations that have impacted education in the last dozen years is the *open education* movement. Openness in education has multiple dimensions and therefore there is no one definition of open education. According to Iiyoshi and Kumar (2008, p. 2) the key assumption behind open education is that "education can be improved by making educational assets visible and accessible and by harnessing the collective wisdom of a community of practice and reflection". Most commonly open education is associated with *open educational resources* (OER). In a basic sense, OER can be understood as teaching, learning and research materials that can be freely accessed, used, adapted and redistributed. In recent years other aspects of openness such as open online courses (Rodriguez, 2013) and open badges (Jovanovic & Devedzic, 2015) have gained attention. Open education can be connected to a number of earlier open movements, such as the public library movement, free adult education, open universities, open classroom movement, and free software movement. When discussing open education, it is important to understand the subtle distinction between *free* and *open*. In the educational context, free refers to access without any cost. Open typically refers to the licensing model that grants users with more permissions than offered by the standard copyright law, but it may also refer to the openness of environment or processes.

Both technology-enhanced learning and open education are related to educational science. The era of information technology and the Web has inspired and facilitated a broader discussion about learning theories. For instance, Paavola, Lipponen, and Hakkarainen (2004) have proposed that there are three main metaphors to describe the genesis of new knowledge — *acquisition*, *participation*, and *knowledge-creation*. The acquisition approach, understanding the mind as a kind of container that can be filled with new knowledge, has been historically the most prominent one. The participation view sees learning as a process of participation in various cultural practices and shared activities. Design cases presented in this dissertation follow the knowledge-creation approach that emphasizes the importance of collective knowledge creation through developing shared objects of activity. This approach is in line with the basic principles of open education because it puts learners in the active role of creators and encourages sharing. There are a number of pedagogical models that can be associated with the knowledge-creation approach. From these, the *progressive inquiry* (Muukkonen, Hakkarainen, & Lakkala, 2004) pedagogical model is most closely related to my work. In the open education field there is a trend of making learning more personal by using personal technologies and giving more control to the learner. In the TEL field, this approach is known as the *personal learning environment* (PLE) (Attwell, 2007). Both open educational resources and personal learning environments are associated with blurring the borders between formal and informal learning (Hylén, 2008; Peña-López, 2013).

The rise of Web 2.0 (O'Reilly, 2005) and personal mobile technologies has changed traditional software design paradigms. Instead of complex and feature-rich monolithic software systems we see lightweight web and mobile applications that are focused on a few key features. Each user can compile a preferred set of tools from a large number of available applications. This means that different applications must be able to communicate and exchange data between each other. Often an ecosystem metaphor is used when talking about this kind of complex digital systems. Several authors have pointed out that considering the similarities between natural and digital systems we could use the term *digital ecosystems* (Briscoe & De Wilde, 2006; Chang & West, 2006). Briscoe and De Wilde (2009) define digital ecosystems as "distributed adaptive open socio-technical systems, with properties of self-organisation, scalability and sustainability, inspired by natural ecosystems". The emerging interest towards digital ecosystems has lead to the discussions that technology-enhanced learning could benefit from digital ecosystems approach (Uden, Wangsa, & Damiani, 2007; Gütl & Chang, 2008). Also, the open education community, both researchers and practitioners have started discussing about open education as an ecosystem. One of the first attempts to map the open education as an ecosystem took place at iCommons Summit 2007 (Schmidt & Surman, 2007). Brown and Adler (2008) are writing about the emergence of open participatory learning ecosystems. A number of authors are discussing about *OER ecosystem* (Mackintosh, 2012; McAndrew & Farrow, 2013; Yuan, Robertson, Campbell, & Pegler, 2010). However, often the word *ecosystem* is used just as a metaphor without connecting it to the digital ecosystems studies. This dissertation approaches the design of online learning tools for open education from the perspective of the digital ecosystems. Online learning tools designed in this study cover different aspects of open education and can be combined in multiple ways with other learning tools. Design decisions have been influenced by other components of the ecosystem such as existing software tools and various regulations (technical specifications, intellectual property licensing schemes, etc).

Methodologically, this dissertation belongs to the field of design research. In its broadest sense, design can be described as planning and giving form to new products. Traditionally, *design* has been a field of practice, but in recent decades a school of *design research* has emerged. In design research, challenges are addressed through practice. When design researchers actually construct something, they will inevitably discover problems and details that would otherwise remain unnoticed. My dissertation can be categorized as constructive design research (Koskinen, Zimmerman, Binder, Redström, & Wensveen, 2011) in which concepts, scenarios, mockups and actual software prototypes are constructed. In software design this dissertation focuses on interaction design. It is a design field that deals with defining the structure and behavior of interactive systems. This study follows the participatory design approaches (Ehn, 1992) to involve users as co-designers in the design process. Engaging users and other stakeholders in the design process raises a need for common language that is equally understood by all partners. For this purpose, scenarios (Carroll, 2000) and design patterns (Alexander, 1979) are developed in this study.

The key concept of my dissertation is the *open education ecosystem (*OEE*)*. Although this concept has been used by other scholars (Lesko, 2013; Mackintosh, 2012; Schmidt, Geith, Håklev, & Thierstein, 2009), there is no established definition. Related concepts will be discussed and a definition will be proposed in Section 2.3.3 in the theoretical framework of this dissertation. The focus of this study lies at the intersection of technology-enhanced learning, open education and digital ecosystems. Design has provided the methodology and practices for this study.

1.2 Defining the Problem Area

The constantly changing socio-technical environment sets new challenges for designing online learning services and tools. Openness, the use of social media, and personalization of learning experiences are among the recent trends in school and higher education. Learners and teachers find creative ways to use a large variety of online tools for learning purposes, although many of these tools have not been specifically designed for education. Many of these Web 2.0 tools are under constant development. This raises new kinds of technical issues such as coordinating and following the learning activities, exchanging data between the tools, archiving the outcomes, etc. Diversity and evolvement of technology are just some of the variables in the open education ecosystem. Openness introduces several new issues such as copyright licensing, business models, privacy and control. The changes also require new pedagogical approaches. For example, a recent challenges for education are the so-called Massive Open Online Courses (MOOCs) that can have thousands of participants.

It is clear that online learning tools for such an evolving and self-organizing ecosystem cannot be completely predesigned. Design problems are often *wicked problems* that have no definitive formulation (Rittel & Webber, 1973). Wicked problems have incomplete, contradictory, and changing requirements that are difficult to identify beforehand. In that sense designing learning services and tools for open education is a wicked problem. Online learning tools have to be designed open and flexible enough, so that users could repurpose and combine them with other tools during the use. Learning tools built for open education have a certain effect also on the whole open education ecosystem. It is a challenge to build tools that respect the ecosystem and its inhabitants, not break its internal relationships.

Based on the discussion above, a major problem area in this study is that designing online learning tools for the open education ecosystem involves uncertain requirements and has to contemplate the influences on and by the stakeholders and other components of the ecosystem.

1.3 Aims of the Study

This study has two main aims. The first aim is to develop new knowledge concerning the potentially needed structure and components of the open education ecosystem. The majority of the authors who have used the "open education ecosystem" concept have stayed on the metaphorical and theoretical level. Exhaustive studies concerning open educational resources have been carried out (Atkins, Brown, & Hammond, 2007; Geser, 2007; OECD, 2007; Tuomi, 2006), but these focus only on the learning content aspect of the ecosystem. A better understanding about open education as a digital ecosystem would benefit educators, researchers, designers, policy makers, and other stakeholders in the field of open education.

The second aim of this study is to provide research-based insights into designing online learning services and tools for open education. To achieve this aim it is important to map the various technical, pedagogical and social design challenges related to the open education ecosystem. These design challenges are studied through five design projects that focus on different aspects of open education. Together with the design challenges this study aims to provide a number of recommended design patterns for open education.

1.4 Design Cases

This dissertation explores the possibilities of supporting open education through five design cases that are presented in the chronological order of designing them. The design cases are:

1. PILOT — multimedia learning resource template;
2. LeMill — web community for authoring and sharing of open educational resources;
3. EduFeedr — coordination tool for blog-based online courses;
4. LeContract — learning contract planning tool;
5. DigiMina — self- and peer-assessment tool.

First two design cases (PILOT and LeMill) are related to open educational resources. These studies were carried out in the context of school education in European countries. The third and the fourth design case (EduFeedr and LeContract) focus on open online courses. These were designed in the context of higher education and teacher training in Estonia. The final design case DigiMina is a designed for the assessment of educational technology competencies for Estonian teachers.

1.5 Research Questions

This dissertation is seeking answers for the following research questions:

Q1: What are the main design challenges related to the open education ecosystem?

Due to the very nature of wicked problems, part of the design challenges are revealed only during the design process, and in actual use. This study maps the design challenges that we have tackled in the design cases included in this dissertation. While these cases focus on designing online learning tools, similar design challenges may be relevant when designing learning scenarios or services for open education. However, due to the evolving nature of the open education ecosystem, this study cannot provide a complete set of design challenges.

Q2: What are the design patterns used in designing online learning tools and services for the open education ecosystem?

General recommendations for designing online learning tools for the open education ecosystem are provided in a form of *design patterns*. Design patterns are recurring solutions to common design challenges. The use of design patterns originates from architecture (Alexander, Ishikawa, & Silverstein, 1977), but design patterns have been successfully used also in several other fields such as software engineering, human-computer interaction and technology-enhanced learning. Design patterns recommended in this dissertation cover the main components of the open education ecosystem.

Q3: What kind of structure and components are needed to create the open education ecosystem?

As the "open education ecosystem" is a relatively new concept, there are a number of different interpretations. This study attempts to explore the open education ecosystem from the design perspective to determine what kind of structure and components are needed and how they should be integrated to create the open education ecosystem.

1.6 The Structure of the Dissertation

The dissertation is divided into seven chapters. In this chapter I have introduced the research context, the problem area, the aims of the study, and the research questions. Chapter 2 will give a theoretical foundation through literature review of four related research areas. Chapter 3 discusses the research design and methodology. Chapter 4 gives an overview of the five publications included in this dissertation. Chapter 5 presents five design projects of online services and learning tools that have been carried out during the study. Chapter 6 discusses the results and findings from the publications and design projects that form the basis of this study. Chapter 7 finally discusses the implications of the study and provides directions for future research.

2. Theoretical Framework and Key Concepts

This chapter discusses the theoretical background and clarifies the key concepts of the thesis. The first section of the chapter provides a brief history of using computers in education and explains some of the tools and technologies that are important for understanding the design cases on which the arguments in the thesis are built on. The second section discusses various perspectives related to open education, such as open educational resources, open and personal learning environments, open online courses, and open assessment. The third section presents the concept of digital ecosystems and aims to draw parallels between open education and digital ecosystems. The theoretical framework chapter ends with a section on designing online learning tools. The pedagogical principles underlying the design are embedded to sections discussing technology-enhanced learning, open education, and digital learning ecosystems. This chapter aims to enlighten the reader in the field of research in general and to locate the design cases included in the wider context.

2.1 Historical Perspective: Five Generations of Computers in Education

The history of computers in education is relatively brief. This dissertation omits the earlier developments such as the mechanical teaching machines by Sidney Pressey (in 1920s) and B. F. Skinner (in 1950s) (Benjamin, 1988), and focuses on the use of digital computers for learning. The first notable research initiatives of using computers in education date back to the early 1960s. Nicholson (2007) highlights Patrick Suppes at the Stanford University and Donald L. Bitzer at the University of Illinois as the most important early pioneers in the field that eventually became referred to as *computer-assisted instruction* (CAI).

Several authors have compared different paradigms of using computers in education, taking either the technological (Leinonen, 2010; Nicholson, 2007) or pedagogical perspective (Anderson & Dron, 2011). Jones (2011) has taken a narrower perspective by comparing the main paradigms of e-learning in higher education. From these comparisons, it is possible to distinguish five generations of using computers in education (see Table 1).

Table 1. Five generations of using computers in education (adapted from Anderson & Dron, 2011; Jones, 2011; Leinonen, 2010; Nicholson, 2007).

Era	Focus	Learning technologies	Learning activities
1959–1985	Computer assisted instruction	Personal computers, intelligent tutoring systems, artificial intelligence, programming tools	Drill and practice exercises, programming
1985–1993	Computer-based training	Educational desktop software, multimedia CD-ROMs	Reading, drill and practice exercises, educational games
1993–1998	Web-based training	Web sites, e-mail, discussion forums, chat	Reading, writing, discussing, testing
1998–2005	E-learning	Learning management systems, learning objects and repositories, computer-based assessment tools, video conferencing	Discussing, creating, constructing
2005–…	Technology-enhanced learning	Web 2.0, social software, personal learning environments, mobile devices, e-textbooks, interactive whiteboards, open educational resources, massive open online courses, learning analytics	Exploring, connecting, creating, evaluating, planning personal learning, reflecting

The beginning of each generation may be connected to an important turning point in the history of computing. It is, however, important to note that this is only one possible way of summarizing the history of computers in education. Each new paradigm has developed in a progressive manner on top of the earlier ones. The earlier paradigms have also stayed alive, although the main focus of research has shifted (Leinonen, 2010, p. 12). Reasons behind these paradigm shifts can also be related to science and education politics, for example the shift of focus from e-learning to technology-enhanced learning in the European context. These five generations of using computers in education are discussed in more detail in the following sections.

2.1.1 Computer Assisted Instruction

The first computer-assisted instruction systems were based on mainframe computers. The PLATO system, developed since 1959 at the University of Illinois, allowed teachers to prepare educational content and students to interact with that content (Alpert & Bitzer, 1970). Another early CAI system, developed since 1963 at the Stanford University, had a focus on drill-and-practice exercises for teaching mathematics and logic (Suppes, 1971).

Although these systems were limited by the existing technological constraints, initiators of both systems had a wider perspective on the use of computers in education. Suppes (1966) emphasized that computers had the potential to become an individual tutor that provided personalized instruction for each learner. Authors of the PLATO system, on the other hand, were critical about drill-and-practice exercises. They argued that the use of computers should allow for advanced learning strategies that involved student-controlled learning and supported the development of critical thinking (Alpert & Bitzer, 1970).

The focus of early CAI systems was on automating the teaching process. One of the most prominent critics of that approach was Seymour Papert, who envisioned that computers could be used “not in the form of machines for processing children, but as something the child himself will learn to manipulate, to extend, to apply to projects” (Papert, 1972). In late 1960s, Papert developed the Logo programming language that was widely used in schools in the United States and elsewhere.

Although the first initiatives were from 1960s, the era of computer-assisted instruction really took off in the mid-1970s with the introduction of personal computers. The main category of educational software developed at that time was the intelligent tutoring systems. The aim of these systems was to provide instruction and automatic feedback to drill and practice exercises without intervention from a teacher (Merrill, Reiser, Ranney, & Trafton, 1992).

In 1970s, the development of technology allowed researchers to focus on the media aspects of computing. Alan Kay and Adele Goldberg criticized the existing hardware and software. While it was successful from the computer science research standpoint, they pointed out that it lacked expressive power in order to make it useful for ordinary users. They envisioned the design idea of a personal media device named Dynabook and developed a related programming language, SmallTalk. Both of these were designed with education and creative tasks in mind. The SmallTalk language allowed the creation of software for drawing, animating pictures and generating music (Kay & Goldberg, 1977).

2.1.2 Computer-Based Training

By the mid-1980s a number of important innovations in computing reached the mass market. In 1984 Apple released the Macintosh computer that became the first commercially successful implementation of a window-based graphical user interface. Graphical user interface and availability of simple software for word processing, drawing and other common tasks made computers much more accessible for the general audience. One of the noteworthy applications from that period was HyperCard, that enabled non-programmers to create hypermedia content. It was widely used for educational purposes in late 1980s and 1990s. Constant advancements in processing power, storage space and multimedia capabilities led the way to the inclusion of CD-ROM drives in early 1990s. These possibilities were used for developing interactive multimedia-based courseware (Park & Hannafin, 1993) that was distributed on floppy disks and later on CD-ROM’s. Multimedia-based courseware offered a wider variety of learning activities than the previous generation of educational software and it became common to provide audio and video content, animations, interactive simulations, and educational games. This era is commonly referred to as *computer-based training* (Sims, 1988).

2.1.3 Web-Based Training

Another important turning point for learning technologies was the invention of the World Wide Web (WWW) by Tim Berners-Lee (Berners-Lee, Cailliau, Groff, & Pollermann, 1992). The technical architecture of the World Wide Web attempted to solve a number of issues that were present in earlier hypertext systems due to the lack of a common naming scheme for documents, common network access protocols and common data formats for hypertext. From the beginning, two underlying principles for the Web have been *universality* and *decentralization*. Subsequently, it has become important to emphasize these principles by talking about the open Web (Berners-Lee, 2010). Universality means that any web page can be linked to by using a unique address. Decentralization allows anybody who follows three basic web protocols to add a web page or create a link. These basic web protocols include HTML (HyperText Markup Language) for writing web pages, URI (Uniform resource identifier) for naming the documents and HTTP (Hypertext Transfer Protocol) for serving the web pages.

The WWW started to gain popularity around 1993 when the underlying technology was released to public domain. Although other Internet technologies such as e-mail were used to supplement courses already in 1970s (Harasim, 2000), it was the Web that made it possible to radically improve access to learning with the Internet. Initially the Web was used mainly in higher education, where teachers and professors were creating simple static web pages for publishing their course materials and sharing their browser bookmarks. The development of server-side technologies allowed the addition of interactive features such as discussion forums and chat. A common early implementation of using the Web in a university course was to provide students readings, guiding them to search information, to communicate with the teachers and other student over discussion forums and chat, and asking them to send their assignments to teachers over the Web or email. The simplicity of HTML language allowed also students to create their own web pages. However, the early Web had very limited multimedia and interactivity capabilities. First studies on the use of the Web for teaching and learning showed better access to up-to-date information, greater student input into their own learning process and a more individual approach to learning and assessment (Sloane, 1997). This era of initial experiments using the Web for learning purposes is known as *web-based training*.

2.1.4 E-learning

Innovative educators who recognized the new possibilities presented by the World Wide Web initially started developing web-based training systems. One of such initiatives was the WebCT system developed in the computer science department at the University of British Columbia (Goldberg, 1997). Positive reactions to these first experiments led many universities to explore how the Web could be used for providing distant education and support for traditional courses at the institutional level. By the end of the 1990s, a number of universities had started developing special web platforms that supported and managed online learning. This coincided with the start of the "dot.com" boom, in which companies had high economic expectations of using the Web in all kind of areas, including education. This era of hopes, hypes and rapid development of online learning technologies is most commonly referred to as the *e-learning* era. Both universities and companies had developed high expectations regarding e-learning: it was believed that with e-learning it would be possible to provide consistent training, reduce delivery time and information overload, increase learner convenience, improve tracking of learning progress and lower expenses (Welsh, Wanberg, Brown, & Simmering, 2003).

The end of the 1990s and the beginning of the 2000s was a very active period both for the development of e-learning technologies and for the advancement of pedagogical practices. Some of the important technologies developed in that era include learning management systems (LMS), learning objects, learning object repositories, computer-based assessment tools, and video-conferencing tools. In parallel with the development of learning platforms, active work was being carried on with the underlying learning technology specifications and standards, that dealt with metadata, content packaging and other interoperability issues.

These technological advancements also caused changes in the pedagogical practices. While delivery of rich content, discussions and computer-based assessment were dominant it was also common practice to provide activities with which learners could construct new knowledge (Rubens, Emans, Leinonen, Skarmeta, & Simons, 2005; Stahl, 2000).

2.1.5 Technology-Enhanced Learning

The most recent important paradigm shift in learning technologies took place around 2005. On one hand it was related to the technical developments that led to new discussion about the impact of Web 2.0 (O'Reilly, 2005), social software (Shirky, 2003) and advances in the mobile technologies of teaching and learning (Sharples, Taylor, & Vavoula, 2005). On the other hand and in parallel with the technical developments there was also a growing dissatisfaction with the dominant pedagogical practices in e-learning (Downes, 2005; Friesen, 2004; Laanpere, Põldoja, & Kikkas, 2004). Chan et al. (2006) refer to this new phase in the evolution of learning technologies as technology-enhanced learning. While e-learning had a focus on institutional technologies, TEL can be characterized by the use of personal web technologies and one-to-one computing where each learner has at least one portable computing device. The use of social software and personal learning environments that are controlled by the learner was seen as an alternative to learning management systems (Klamma et al., 2007; Wilson et al., 2007). The research on learning content has shifted from learning objects to open educational resources (D'Antoni, 2009; Duval, Verbert, & Klerkx, 2011) and e-textbooks (Sun, Flores, & Tanguma, 2012). Some of the recent research trends in TEL include massive open online courses (Kop, Fournier, & Mak, 2011) and learning analytics (Siemens, 2012). The shift towards personalization has enriched the pedagogical practices used in the era of TEL. Common pedagogical practices include exploring, connecting, creating and evaluating. The use of personal learning environments is strongly connected to self-directed learning where learners plan their personal learning goals and reflect on their process and outcomes.

2.2 Open Education

Openness in education is related to a number of aspects such as free and open access to learning resources and courses, open architecture of physical and virtual learning spaces, open approaches to designing learning activities and assessing learning outcomes. The following sections will introduce the historical background of the open education movement and different aspects of openness in education.

2.2.1 The Historical and Philosophical Background of Open Education

Providing free and open access to education is not a new idea. Openness and sharing of knowledge lie in the essence of academic culture. This section will shed light on some of the earlier movements that are have influenced the development of the open education movement, such as the public libraries and library movement, free adult education, distance education and open universities, the open classroom movement, hacker culture and free software movement.

During the fifteenth century, when the printing press was invented, libraries were typically connected to some religious or academic institution and not open to the general public. Although the earliest notes about public libraries date back to 1464 in Bristol (Orme, 1978), the public library movement really took off in 1850s. According to Black (1997), the first public libraries of that era were developed in the industrial towns and targeted for “good citizens and skilled workers”. By the time of the First World War there was a well-established structure of public libraries in the cities of the United Kingdom. Black (1997) notes that both the poor and the middle class groups of people equally used public libraries. Other Western countries followed the public library movement in the United Kingdom.

While the public library movement enabled anybody to have basic access to information, it was soon seen that there is also a need for flexible learning arrangements that are accessible specifically for adults. One of the first examples of free adult education is the folk high school movement in the Nordic countries (Toiviainen, 1995). The first folk high school was established in 1844 by the Danish pastor, poet and philosopher N. F. S. Grundtvig. The aim of the folk high schools was to provide popular education for peasants and other people who did not have good access to the formal higher education. The schools were typically founded by the educated people who wanted to contribute to the development of the local community. The folk high school movement spread from Denmark to Sweden, Finland and several other countries where it was financially supported by the government.

Folk high schools opened up education for new groups but still required physical presence from the learners. By the end of the nineteenth century, a number of large universities started offering some courses as correspondence courses in which printed course materials were sent out using the postal service. Sumner (2000) differentiates between three generations of distance education. The first generation of distance education, correspondence courses, had mostly one-way communication, since the feedback via the postal service was slow. The second generation of distance education started using new technologies such as broadcast media, cassettes and some limited two-way communication. This also led to the establishment of special distance education universities. For example, The Open University (United Kingdom) was established in 1969 and the Athabasca University (Canada) in 1970.

The third generation of distance education is based on computers and the Web. The open universities still play an important role both in offering distance education courses and in doing research on distance education technologies. Also, all major universities today are providing distance education courses over the Web. However, courses provided by the open universities are typically not free and the enrollment fee may be a barrier for some learners.

Simultaneously with the establishment of open universities, there was also a movement to change the teaching and learning practices in schools towards greater openness and learner-centeredness. The open classroom movement originated from British schools but gained momentum in the United States between the late 1960s and late 1970s (Cuban, 2004). The open classroom movement tried to change both the teaching practices and the physical setup of the learning spaces. It promoted group work over whole-class lessons, blending of different subjects and discovery of new knowledge by the learners themselves. The classrooms were rearranged to have different group work areas instead of rows of desks. The open classroom movement is important in the context of this dissertation, since it had a wider perspective on openness in education. While earlier movements focused on providing free or improved access to education, the open classroom movement aimed to change the educational practices and the learning environment. However, the peak of the open classroom movement did not last for a long time. Cuban (2004) sees changes in American public opinion as a reason for the quick rise and decline of the open classroom movement. In the 1960s people felt a need for greater creativity in order to compete with the Soviet Union, while in the 1970s the society was divided because of the Vietnam War and became worried that the academic standards of schools had declined.

Some thinkers of that period were questioning the need for a school as an institution at all. The most radical critic of the educational system was an Austrian philosopher Ivan Illich who gained attention with his book “Deschooling Society” (Illich, 1971/2011). Illich argued that a good educational system should have the following three purposes: “it should provide all who want to learn with access to available resources at any time in their lives; empower all who want to share what they know to find those who want to learn it from them; and, finally, furnish all who want to present an issue to the public with the opportunity to make their challenge known." He proposed the idea of "learning webs" that would consist of four types of networks (Illich, 1971/2011, p. 78–79):

- reference services to educational objects;
- skill exchange networks for people who are willing to share their experience with others;
- peer-matching networks for finding other learners interested in the same topic;
- reference services to educators.

The open education movement is also influenced by the hacker culture that emerged in the 1960s in computer science departments where skilled students and staff tried to use the power of computing in new ways. Himanen (2001) discusses hackers' ethical understandings and concludes that for hackers, social motivations such as being part of a community and getting recognition for their contribution were more important than direct monetary benefit. Therefore, a lot of hackers were critical of the commercialization of software that made the software less affordable and limited possibilities to make modifications to the software.

The free software movement and the Free Software Foundation established by Richard Stallman in 1985 focuses on promoting universal freedoms related to creating, using, modifying and distributing the software. In 1998, the Open Source Initiative was established and a more business-friendly concept of *open source software* was taken into use. These two movements are often referred to together as *free/libre/open-source software*.

The hacker culture lead to a number of technical, sociocultural and legal innovations such as developing various competing versions of the software from the same code, using collaboration-based authoring models and releasing software under open licenses (Lin, 2007). Although hacker culture is mainly associated with free software, hackers also valued free access to knowledge. A good example is the Project Gutenberg[1] that was started in 1971 by Michael Hart at the University of Illinois (Hart, 1992). Hart used his access to a mainframe computer to set up a public archive of electronic books that were no longer under copyright. Project Gutenberg now hosts a collection of over 50,000 free e-books and can be seen as one of the inspirations for the open educational resources movement.

Since early 2000s there has emerged a number of loosely connected open movements and communities that all together form the free culture movement (Fuster Morell, 2011). In addition to the open education movement, these include movements and communities interested in open source, open data, open access, open science, open knowledge, and open policies. All of these movements share a common set of values and act independently and together to influence the authorities to reform the current intellectual property regime. The following sections will introduce the main initiatives of the open education movement.

[1] http://www.gutenberg.org

2.2.2 Open Educational Resources

While the main focus of learning objects research in the 1990s was on developing infrastructure for sharing and reuse of content (repositories, metadata specifications), some researchers also turned their attention to copyright issues that hindered the large scale reuse of learning objects. In 1998 David Wiley introduced the idea of *open content* and released the first OpenContent License[2]. According to Wiley and Gurrell (2009), "open content was an attempt to apply the pragmatic arguments made in favour of open source software to educational materials and other content, including scholarly research, music, literature and art."

In 2001 Lawrence Lessig and other open content activists founded Creative Commons. This organization created a set Creative Commons (CC) licenses that are used worldwide for sharing and remixing open content. There are six main licenses that allow authors to reserve a different extent of rights. For example, some CC licenses allow commercial use and some do not. While the CC licenses have provided a flexible framework for sharing open content, there are also issues such as license incompatibility and the unnecessary use of non-commercial restriction (Keats, 2006).

In 2002 UNESCO organized a meeting to discuss the recent developments related to free and open sharing of educational content. The participants of the meeting decided to use a term *open educational resources* to refer to educational resources that are free for use and adaptation (UNESCO, 2002). During the years a number of definitions have been proposed for OER (Gurell, 2008, p. 2; OECD, 2007, p. 30; Schaffert & Geser, 2008; UNESCO, 2002, p. 24; UNESCO, 2012; The William and Flora Hewlett Foundation, n.d.). This dissertation follows the latest definition from the UNESCO Paris 2012 OER Declaration which defines OER as "teaching, learning and research materials in any medium, digital or otherwise, that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions" (UNESCO, 2012).

David Wiley has attempted to define OER's through the rights that are granted for the user. Initially the framework included four 'R's of openness (Hilton, Wiley, Stein, & Johnson, 2010), later it was extended to include five 'R's (Wiley, 2014): retain, reuse, revise, remix, redistribute. These five R's should give the authors and users control over creating and using open educational resources. Wiley defined "reuse" as the most basic level of openness that allows anybody to use content in an unaltered way. "Revising" enables people to modify the content and "remixing" involves combining two or more resources. "Redistributing" covers the right to share copies of the original, revised and remixed versions. "Retaining" access to the content was added to the framework in 2014 since many online services make it difficult for authors and users to have a complete control over their content.

Common types of OER online initiatives include databases of full set of materials for a specific courses (also known as OpenCourseWare initiatives), re-

[2] http://web.archive.org/web/20140709203845/http://www.opencontent.org/opl.shtml

positories of individual OER's, and referatories that link to the OER's that are hosted elsewhere. Connexions[3] (now called OpenStax CNX) was one of the first OER repositories (established in 1999) that allowed users to create web-based content and provided limited features for collaborative authoring. MIT OpenCourseWare[4] (established in 2002) provides complete sets of course materials with learning resources, assignments, recommended readings, syllabus, and also in some cases, recorded video lectures. Other well-known initiatives include Curriki[5] repository (established in 2006) and OER Commons[6] that contains both a referatory and an authoring tool (established in 2007). WikiEducator[7] and Wikiversity[8] (both established in 2006) are attempts to use wiki as a collaboration platform for creating open educational resources, and Wikimedia Commons[9] is a repository of digital media for learning purposes.

A number of challenges for large-scale adoption of open educational resources can be identified from literature (Atkins et al., 2007; Browne, Holding, Howell, & Rodway-Dyer, 2010) and the experience of existing OER initiatives. These challenges are related to authoring, quality, legal issues, awareness, and sustainability of OER's. Regarding the authoring, OER's can be created either by institutions or by individuals. Weller (2010) refers to these as *big* (institutionally created) and *little* (individually created) OER's. Furthermore, it is possible to have peer-produced and individually created resources. However, the OER community lacks extensive examples of peer production such as Wikipedia. Collaborative features and processes of authoring tools have been found as critical issues for supporting the co-authoring of OER's (Petrides, Nguyen, Jimes, & Karaglani, 2008). There is also an issue of motivating educators to publish their existing resources as OER's. Creating learning resources by individuals and through peer production raises the question of quality. Camilleri, Ehlers, and Pawlowski (2014) see quality of OER's as a confluence of efficacy, impact, availability, accuracy, and excellence. On the one hand, it is challenging to incorporate quality assurance mechanisms into the peer production process without complicating the workflow. On the other hand, there is also the possibility of identifying high quality resources during the use time through learning analytics and social recommendations. A group of challenges is related to legal issues such as license incompatibility, checking for potential copyright infringements, and limited understanding of copyright principles among the educators. There is also a greater need to raise the awareness of learners, educators and policy makers about open educational resources. Finally, there is the challenge of sustainability. This is an issue both at the resource level where authors may neglect updating the resource and at the initiative level where a lack of funding may threaten the sustainability.

[3] http://cnx.org

[4] http://ocw.mit.edu

[5] http://www.curriki.org

[6] http://www.oercommons.org

[7] http://wikieducator.org

[8] http://www.wikiversity.org

[9] http://commons.wikimedia.org

2.2.3 Open and Personal Learning Environments

The initial focus of the open education movement was on making the learning resources openly available. However, learning content plays only a partial role in the learning process. With the growing interest in social software (Shirky, 2003) and Web 2.0 (O'Reilly, 2005) researchers and practitioners in education have started to reconsider more and more the practices of teaching and learning in the context of using the Internet. Blogs and wikis were seen as especially promising social software tools for learning (Augar, Raitman, & Zhou, 2004; Williams & Jacobs, 2004).

The growing use of social software in learning highlighted the pedagogical limitations of many learning management systems. LMS's were criticized because their design was often based on a simplistic understanding of teaching and learning (Coates, James, & Baldwin, 2005; Dalsgaard, 2006). In LMS, all the tools necessary for running the course were integrated into one standalone system. While this approach had certain benefits for managing the courses (course descriptions, student enrollment, course schedules, statistics about student activity, etc.), it also had important limitations by enforcing certain pedagogical practices. Often, the focus was on presenting sequenced content and providing simple assessment tests that can be automatically corrected. The social features of LMS's were typically limited to discussion forums. According to Dalsgaard (2006), learning management systems do not effectively support social constructivist learning in which learners take a higher responsibility in governing their learning and collaborative activities with other learners. For those kinds of learning scenarios, combining a set of social software tools that support the needs of specific learning activities would be a more flexible solution rather than using an LMS that provides a fixed structure for learning activities.

Wilson et al. (2007) proposed personal learning environments as an alternative design to the learning management systems. They described PLE as an open system where the focus is on coordinating connections between the user and services instead of integrating tools and data into a single system. This kind of learning environment would have symmetric relationships between users and does not position the teacher at the center. Technically, PLE's rely on open Internet standards and lightweight application programming interfaces (APIs) instead of complex e-learning standards. Regarding the learning content, PLE's would use open content and encourage remix culture. PLE's would have a personal and global scope instead of organizational scope that is typical for LMS's.

While a set of connected social software tools make up an important part of the PLE, the concept is wider than just a collection of software tools. Johnson and Liber (2008, p. 3) argue that personal learning environments could lead to "a learner-driven model of education, where the traditional provider-centric role of institutions is challenged." Väljataga and Laanpere (2010) see PLE's as a way to give a higher degree of control to learners over their learning process. They propose, that learners should not only be able to select tools for their

PLE, but also set their personal learning goals, decide on the required resources, learning strategies, and criteria for evaluating the learning outcomes.

In the context of open education, an important characteristic of personal learning environments is openness. When discussing the openness of learning environments and the Web in general, several authors have used the *walled garden* metaphor (Anderson & Wolff, 2010; Berners-Lee, 2010; Mott & Wiley, 2009). In a typical LMS, each course can be seen as a walled garden. Students need to be enrolled to access the course, there is little or no knowledge sharing between the courses and with the open Web. PLE's are based on social software tools where the communication and activities are often visible for everybody. However, the use of social software and Web 2.0 tools does not necessary guarantee openness. Large social networking sites have also become walled gardens that isolate the information posted by their users from the open Web. They break the principle of universality of the open Web, since often it is not possible to link to a specific piece of information in the social networking site.

Although the openness of learning environments raises some privacy concerns (Weippl & Ebner, 2008), there are a number of undeniable benefits. McLoughlin and Lee (2007) see the possibility to connect to other people anywhere in the world, collaborative information discovery and sharing, collaborative content creation, and the possibility of aggregating information, as the main benefits provided by the open nature of social software. Several authors have also used the concept of *open learning environments* (Baker & Surry, 2013; Conde, Garcia, Casany, & Alier, 2010). Baker & Surry (2013, p. 190) define the open learning environment as "an organic open system that is comprised of a variety of unique components found in the environment, the instructor, and the student." They argue that open learning environments could be used for opening up traditional education models, providing space for focusing on specific topics, and creating new alternative education models.

2.2.4 Open Online Courses

One way to challenge traditional education models is to use open learning environments to enable anybody to take part in formal higher education courses. In the fall of 2007, David Wiley was conducting the *Introduction to Open Education*[10] undergraduate course at the Utah State University. Wiley decided to experiment by allowing anybody who was interested in the topic to enroll to the course free of charge. The only requirement was to have a blog for posting the weekly assignments. Enrollment to the course was simply handled by a wiki page where people added their blog addresses. The course was offered in three different ways: for-credit, non-credit, and informal. For-credit participants had to agree with a professor in their home university to receive credits for the completion of the course. Non-credit students participated in the course without grading but were able to receive a certificate of completion in

[10] http://web.archive.org/web/20071215133745/http://opencontent.org/wiki/index.php?title=Intro_Open_Ed_Syllabus

the end. Informal participants attended the course completely on their own. All together, about 50 participants enrolled to the course (Fini et al., 2008).

For the spring term in 2008, this format was developed further separately by Alec Couros (Couros, 2010) and Teemu Leinonen (Leinonen, Vadén, & Suoranta, 2009). Couros, who was giving the *EC&I 831: Social Media & Open Education*[11] course at the University of Regina, identified that in these kind of open courses it is critical to support the development of the participants' personal learning networks. In order to do that, he introduced collaborative assignments in addition to individual blogging and synchronous sessions to build group identity. Leinonen, who was organizing the *Composing free and open online educational resources*[12] online course at the University of Art and Design Helsinki[13], used Wikiversity as a platform for developing and running the course. He encouraged the course participants to already have the course content, program and assignments co-edited prior to the start of the course. The author of this dissertation acted as a co-facilitator in Leinonen's course.

These first open online courses provided some insights both on the possibilities and limitations of blog-based open online courses. The genre of blog-based open online courses includes the teacher writing assignments to the wiki or course blog and students writing responses to these assignments in their personal blogs. Students obtain a wider perspective on the topic by reading and commenting on each other's blog posts. Blogs provide a simple way of opening up course participation and the learning environment for informal participants. Use of blogs has a number of pedagogical benefits such as motivating learners, fostering collaboration, enabling learners to get feedback to their ideas from peers, and enhancing critical thinking (Goktas & Demirel, 2012). However, the simple structure of a central wiki, course blog and personal blogs was not scalable for a large number of participants. Activities such as managing the lists of active participants and submitted assignments required extra work from the facilitator. Also, the discussions taking place in the comments were fragmented between the different blogs (Efimova & de Moor, 2005; Põldoja, Duval, & Leinonen, 2016).

An open online course with a large number of participants requires a different instructional design and a larger variety of tools. In the fall of 2008, George Siemens and Stephen Downes organized an open online course *Connectivism and Connective Knowledge*[14] (CCK08) that attracted approximately 2,200 participants. The course was based on connectivist design principles (McAuley, Stewart, Siemens, & Cormier, 2010), which focus on knowledge sharing between the participants instead of a fixed set of assignments. Due to the nature of the course, a large variety of online tools were used in addition to wiki and blogs (Fini, 2009). The participants started calling these types of courses MOOCs – massive open online courses. Later the MOOC format was

[11] https://eci831.wikispaces.com

[12] https://en.wikiversity.org/wiki/Composing_free_and_open_online_educational_resources

[13] In 2010, University of Art and Design Helsinki merged with two other universities and formed Aalto University. Currently the school is named Aalto University School of Arts, Design and Architecture

[14] http://web.archive.org/web/20090711085816/http://ltc.umanitoba.ca/wiki/Connectivism_2008

picked up by some of the leading universities. For example, the *CS221: Introduction to Artificial Intelligence*[15] course at the Stanford University had more than 160,000 enrolled participants (Rodriguez, 2012). This course did not use social software tools but had a special platform with lecture recordings and assignments. Since then, a number of special platforms such as Coursera[16], edX[17] and Udacity[18] have been developed for MOOCs. It can be argued, that courses running on these platforms are not "open" as traditionally thought of being open in the context of the open Web. On these MOOC platforms, learners have to enroll to access course content, which is often also not openly licensed. Also, these platforms have started to provide paid courses in addition to free MOOCs. Wiley (2015) has even criticized that "MOOCs, as popularized by Udacity and Coursera, have done more harm to the cause of open education than anything else in the history of the movement".

There is a growing body of research that focuses on the pedagogical, technological and organizational aspects of MOOCs (Liyanagunawardena, Adams, & Williams, 2013). Most often, the researchers distinguish between the connectivist cMOOCs and Stanford-like xMOOCs (Rodriguez, 2013). However, there are a wider variety of different types of open online courses. Conole (2014) has proposed a framework of 12 dimensions (openness, massiveness, use of multimedia, degree of communication, learning pathway, quality assurance, amount of reflection, certification, formal learning, autonomy, diversity) for classifying open online courses.

Two design cases included in this dissertation were developed in the context of blog-based open online courses in Tallinn University. Blog-based open online courses can be typically characterized by a high degree of openness and reflection, but a low degree of massiveness. In Tallinn University, these were formal university courses where the informal participants could participate in online activities by through their blogs. In the Estonian context, this typically meant a small number of informal participants in addition to the university students. In addition to online activities, there were typically also some face-to-face seminars for the university students. Design challenges related to this kind of blog-based open online courses are discussed by Väljataga, Põldoja, and Laanpere (2011). Due to a small number of participants, creating and sustaining community gravity needs a careful planning. The decentralized nature of blog-based learning environments raises challenges in monitoring participation and content flows. There is also the question as to what extent the learning content and activities can be developed beforehand. Finally, open online courses that take place in blogs require a different approach on feedback and assessment.

[15] http://web.archive.org/web/20111203044829/https://www.ai-class.com/

[16] https://www.coursera.org

[17] https://www.edx.org

[18] https://www.udacity.com

2.2.5 Assessment and Recognition of Open Learning

Open online courses and learning activities that take place in the open Web introduce new kinds of challenges for assessment and recognition. Learners have a flexible opportunity to take part in various open online courses. It is common for them to not complete the whole course but participate only in those activities that they find most relevant. Also, learners can study independently using open educational resources. These new learning opportunities raise a question of recognizing the skills and competencies obtained through open learning. Some xMOOC platforms have built in computer-based assessment tools and provide certificates for learners who have completed the course. MOOCs offered by universities may provide university credits at the completion of the course. There are also initiatives by institutions such as Saylor Academy[19] and OERu[20] that are working with partner universities to provide assessment and credits for open learning. These models mainly attempt to copy formal recognition mechanisms that are present in higher education.

Some assessment issues are specific to blog-based open online courses. Feedback for blog posts is typically given via comments. However, public comments are not suitable for grading students' work, since grades are private data. Students post their submissions typically as reflective blog posts. This means that blog-based open online courses cannot rely on computer-based assessment as it is done with xMOOCs. It is not realistic to expect the facilitator to give feedback for each blog post and therefore it is crucial to involve learners through peer-review and peer-assessment activities. Also, as it is common in other types of open online courses, informal participants often complete only some assignments.

One solution for assessing and recognizing open learning is the use of open badges (OBs) (Jovanovic & Devedzic, 2015). Open badges infrastructure allows any organization or educator to issue digital badges for learners who have completed the assessment tasks. Technically, badges are digital images that have a set of encrypted metadata such as the issuer, criteria, and evidence. Learners can collect earned badges to the digital backpack and display them on their social media profiles. As the OB technology is relatively new, there is still limited empirical research on using open badges. Some of these studies focus specifically on using open badges in blog-based open online courses. For example, the study of Santos et al. (2013) has revealed that the use of OBs together with a learning analytics dashboard helps to motivate learners. Haug, Wodzicki, Cress, and Moskaliuk (2014) also studied motivational issues and found out that those learners who aimed to earn badges had smaller decrease of activity during the course than learners who were not interested in badges. Põldoja and Laanpere (2014) concluded that the use of badges could solve some of the assessment issues such as private grading in blog-based courses and provide a greater choice of learning pathways.

[19] http://www.saylor.org

[20] http://wikieducator.org/OERu

Issuing certificates for completed MOOCs and providing open badges are organizational and technical solutions that are more related to recognition than assessment. As pointed out by Wiley (2015), there is still little done in the field of open assessment. Wiley sees sharing open competencies and performance assessment tasks as one solution for assessment related issues. The benefit of performance assessment tasks is that these cannot be cheated like computer-based assessment tasks, thus they can be openly shared.

From the pedagogical perspective, open assessment could be associated also with learner-centered assessment methods such as self-assessment and peer-assessment. For example, self-assessment could be used in combination with the personal learning contract method (Anderson, Boud, & Sampson, 1996) in blog-based open online courses. In this approach, learners set their personal goals and evaluation criteria in the learning contract and use these to evaluate their achievements at the end of the course. Peer-assessment has been suggested as a widely applicable assessment method for different types of open online courses. This is especially true with large MOOCs that where it is virtually impossible to get direct feedback from the facilitator (Suen, 2014).

2.3 Open Education as an Ecosystem

Early online platforms were typically self-contained independent systems, for example learning management systems such as WebCT. With the emergence of social software and Web 2.0 in mid 2000s, people started to talk about *ecosystems* in addition to *platforms*, when referring to digital systems. The ecosystem metaphor was taken into use to emphasize the possibility of integrating and connecting software with other services. The following sections will introduce the concept of *digital ecosystems* and present some examples from actual practice. More specifically, this theoretical overview will discuss technology-enhanced learning and open education from the perspective of digital ecosystems.

2.3.1 Digital Ecosystems

The concept of digital ecosystems appeared in mid 2000s. During that period, it was often discussed from the biological perspective, as the scholars drew parallels between natural and digital ecosystems. In order to understand, how digital ecosystems are similar to natural ecosystems, the main concepts of natural ecosystems have to be explained first.

Natural ecosystem could be defined as “the biological community together with the abiotic environment in which it is set” (Begon, Townsend, & Harper, 2006, p. 499). The natural environment is comprised of different ecosystems, for example seas, rivers, lakes, forests, fields, deserts and urban ecosystems. Each ecosystem consists of a *community* of living organisms and an area where they live. The area inhabited by the species is known as *habitat*. The community consists of *populations*, which are made of individuals of the same species. Each habitat could be divided to *microhabitats* where specific populations live. Populations together with the microhabitats in which they live form *niches*. A niche could be understood as a summary of the organism's tolerances and requirements. For example, a niche in the sea ecosystem could have a temperature, pH level and salinity, all of which are suitable for specific populations inhabiting this microhabitat (Begon et al., 2006). The community of living organisms is the biotic part of the ecosystem. Environment (e.g. air) and its characteristics (e.g. temperature, humidity) are the abiotic part of the ecosystem. The relationship between the main concepts related to natural ecosystems is presented in Figure 1.

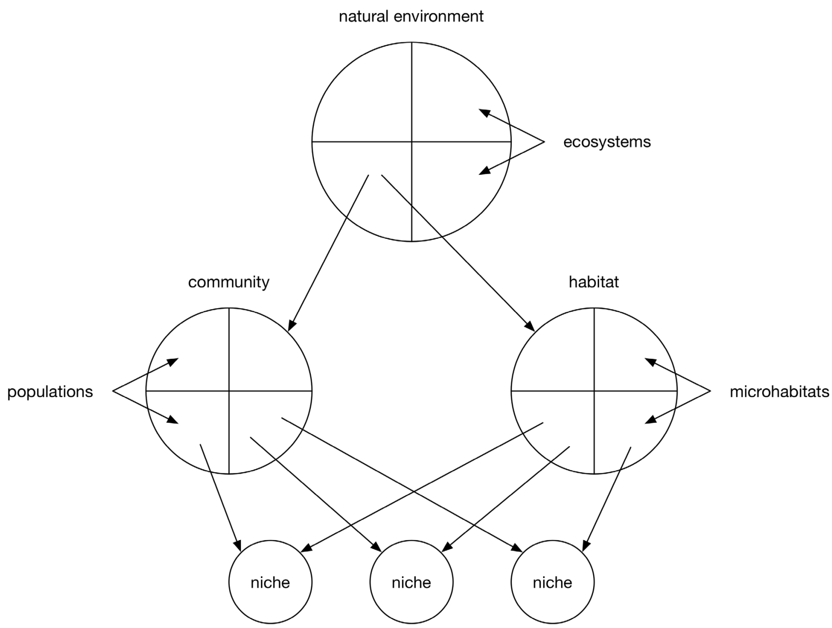

Figure 1. Main concepts of natural ecosystems (redrawn from Briscoe, Sadedin, & De Wilde, 2011)

In one of the early publications about digital ecosystems, Chang and West (2006) discuss the similarities between natural and digital ecosystems and summarize four essences of an ecosystem that are present in both types of ecosystems:

- interaction and engagement;
- balance;
- domain clustered and loosely coupled species;
- self-organization.

Interaction and engagement takes place between the species for mutual benefit. Ecosystems keep balance between the species in order to sustain harmony and stability. Species are domain clustered and loosely coupled groups, that have a similar culture, habits, interests and objectives. Finally, species have the ability to self-organize by being independent and having the self-defense mechanisms. Based on these essential characteristics, Chang and West (2006) proposed to define digital ecosystem as "an open, loosely coupled, domain clustered, demand-driven, self-organising agents' environment, where each specie is proactive and responsive for its own benefit or profit". Later, Brisco and De Wilde (2009) have proposed a more simplified definition that sees digital ecosystems as "distributed adaptive open socio-technical systems, with properties of self-organisation, scalability and sustainability, inspired by natural ecosystems".

Digital ecosystems are discussed in academic writings at various levels of detail. Some researchers go to great depths in analyzing digital ecosystems as digital counterparts of natural ecosystems (Briscoe et al., 2011), while many others remain at the metaphorical level. Pournaras and Miah (2012) distinguish between two types of research regarding digital ecosystems. *Metaphor-inspired* research areas have their own terminology but introduce some concepts inspired by the ecosystem metaphors. Examples of metaphor-inspired computing areas include peer-to-peer computing, cloud computing, agent-based computing, and grid computing. *Metaphor-defined* areas of computing rely more explicitly on biological concepts such as self-organization, self-healing, evolution and sustainability. Some metaphor-defined computing fields include autonomic computing, organic computing, evolutionary computing, and green computing.

This dissertation belongs to the metaphor-inspired approach, which has certain benefits for the design. Metaphors have been found useful in early phases of the design process, especially when dealing with wicked or ill-defined design problems. In these kinds of situations, metaphors help the understanding of unfamiliar problems in terms of known contexts. Thus, the use of metaphors could help to come up with innovative design solutions (Casakin, 2007).

From the cloud computing perspective, digital ecosystems can be associated with cloud services, user communities and big data. According to Blanke (2014, p. 22), "digital ecosystems describe the connections between networks of platforms, software and users". Blanke sees *crowds* as the equivalent of populations in natural ecosystems. The role of crowds is to make the large scale authoring, processing and analysis of digital content easier. Depending on the content, these are the tasks that cannot be easily done by the computers. This is associated with the idea of crowdsourcing (Howe, 2006), which means involving crowds of individuals in tasks that require a lot of time or other resources. Blanke suggests *clouds* as the equivalent of habitats and microhabitats in natural ecosystems. Clouds are not simply storage spaces but platforms on which various applications are built on. *Services and applications* in digital ecosystems are the same as niches in natural ecosystems. A service or application is built on a cloud platform and used by certain crowds. This conceptualization of digital ecosystems is depicted in Figure 2.

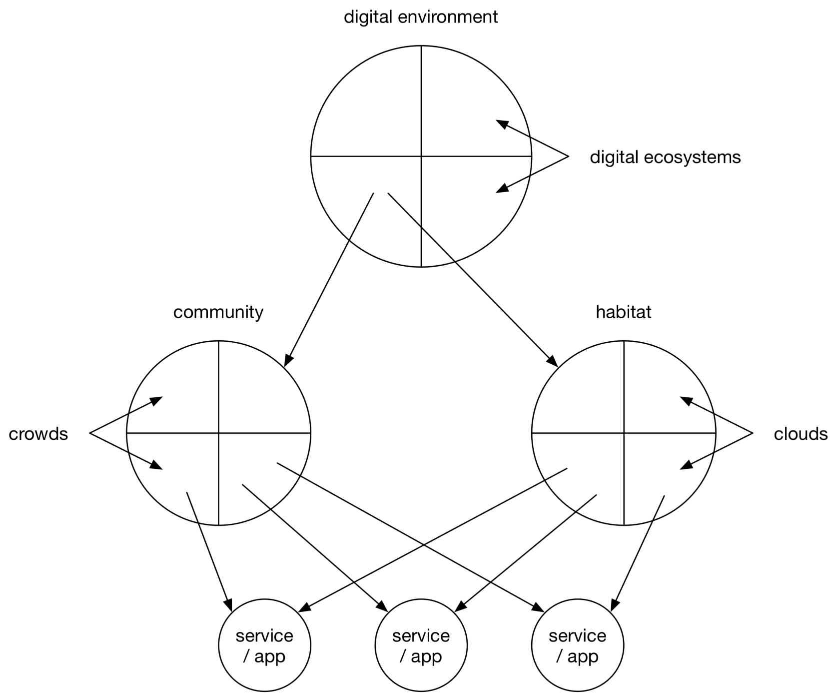

Figure 2. Main concepts of digital ecosystems (based on Blanke, 2014, p. 24)

This view on digital ecosystems also emphasizes the important role of digital content. Blanke (2014) uses the term *digital assets*, when referring to the content in digital ecosystems. At the generic level, digital assets can be understood as digital objects that have an economic, social or cultural value. In order to realize these values, digital assets are described with metadata and usage rights that enable their consumption. Open educational resource that is described with appropriate metadata, published under a Creative Commons license, and distributed through a repository, would be a good example of a digital asset.

Technically, digital ecosystems are related with service-oriented architecture (SOA) (Brisco et al., 2011). In service-oriented computing, services are used as fundamental components for developing software applications. Services can be understood as self-contained technology neutral software components that are used by other applications through a communication protocol (Papazoglou, 2003). SOA allows the combination and use of existing software components when creating new applications. Many Web 2.0 services provide APIs that enable other developers to build new applications for interacting with content and data. This may lead to an ecosystem of connected services and applications. A good example is Twitter, that has a large number of applications and services that use its APIs, both on Web and on mobile platforms.

On a practical level, many widely used online services could be discussed as digital ecosystems. For example, it is possible to talk about the “Google ecosystem”, “Facebook ecosystem”, “Apple ecosystem” or “Wikipedia ecosystem”. In the case of Google, there are a large number of individual applications that are all loosely joined. We can see, how Google is trying to keep balance in the ecosystem by coming up with new applications, redesigning existing applications and sometimes closing applications that do not fit anymore with their goals. Facebook is partly an example of a walled garden where user crowds contribute to the development of additional applications that work inside Facebook. However, some parts of Facebook are open to the Web and external services. The “Apple ecosystem” is built around the hardware, software and services developed by the company. This has enabled the company to achieve a high level of interoperability between the Apple devices and software. However, Apple could be also criticized for having built a closed ecosystem that intentionally limits interoperability with competitor services and devices. Wikipedia and other wiki-based communities run by the Wikimedia Foundation could be seen as an example of an open ecosystem. Wikimedia Foundation provides the infrastructure that enables user crowds to develop multilingual wiki projects. The developed content is available under a free license that allows reuse by other people and services.

2.3.2 Digital Learning Ecosystems

Ecosystem thinking has inspired the design of various types of information systems. In the context of this dissertation, it is important to look at the ecosystems approach on technology-enhanced learning. As pointed out by Gütl and Chang (2008), the increasing complexity of modern learning setups requires appropriate models and architectures for communicating conceptual ideas and turning them into practical implementations. It is common, that a number of different systems are used in a typical learning scenario for creating and distributing learning content, participating in group work and discussions, reflecting on the personal learning, and managing the course.

Several authors have proposed concepts such as *e-learning ecosystem* (Chang & Guetl, 2007; Uden et al., 2007), *digital learning ecosystem* (Ficheman & de Deus Lopes, 2008; Laanpere, Pata, Normak, & Põldoja, 2012) or *digital teaching and learning ecosystem* (Reyna, 2011). Their interpretations differ mostly in details, how they model the biotic and abiotic component of the ecosystem. From these studies, Chang and Guetl (2007) have a most systematic approach on modeling the e-learning ecosystem. Based on Pickett and Cadenasso (2002), they recommend five characteristics for describing particular instances of ecosystem models:

- the biotic and abiotic components and their level of aggregation;
- the temporal extent and the temporal and spatial scale of the system;
- the physical boundaries of the system;
- the type and extent of relations and interaction between the ecosystem components;
- constraints on system behaviors.

Following these characteristics, Chang and Guetl (2007) propose the concept of *learning ecosystem* that consists of learning stakeholders (learners, teachers, school administration, content providers, parents, etc.) and their communities as the biotic part and learning utilities (content, tools) as the abiotic part of the ecosystem. In order to describe the physical and logical borders of the system, Chang and Guetl (2007) use the concept of *learning environmental boundaries*[21]. For example, the boundaries of blog-based open online courses are defined by the use of blogs, feed readers, and external social media platforms that allow content to be embedded into blog posts. Both internal relations between the ecosystem components and external forces influence the behavior of the ecosystem. These internal and external influences are specified as *learning ecosystem conditions*. For each concrete model of the learning ecosystem, also the temporal extent and the temporal and spatial scale also have to be specified. Simplified representation of the learning ecosystem is presented in Figure 3. This representation could be used as a basis for visualizing learning ecosystems in different contexts, including open education.

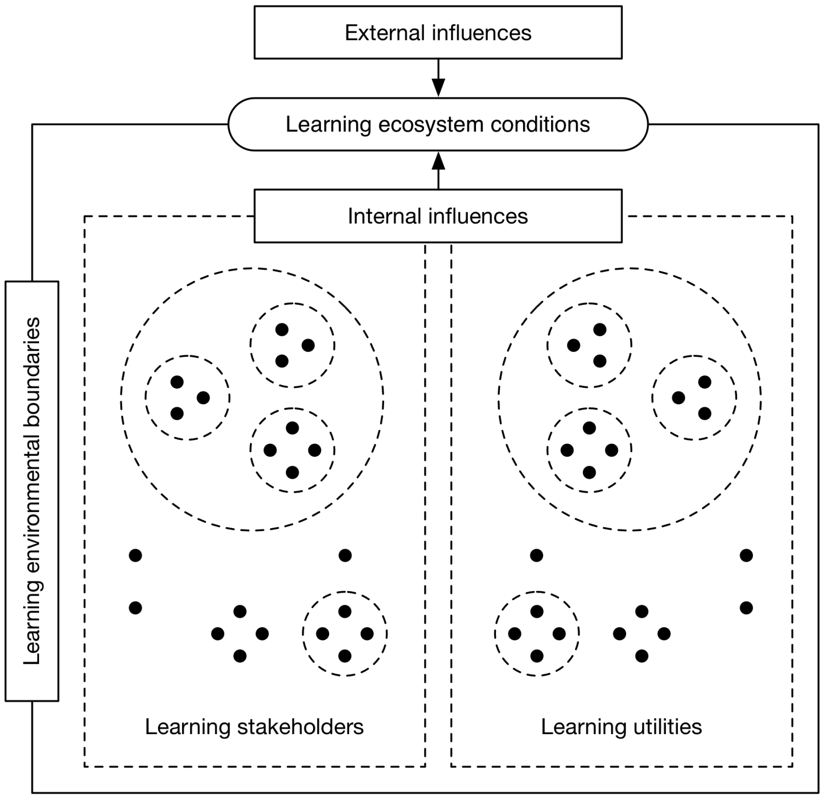

Figure 3. Simplified representation of the learning ecosystem (redrawn from Gütl & Chang, 2008)

Chang and Guetl (2007) suggest that while the concept of the learning ecosystem could be used to describe any physical or virtual learning setting, it is pos-

[21] In a later publication, Gütl & Chang (2008) use the concept of *learning environmental borders* in parallel with *learning environmental boundaries*. These two concepts should be understood as synonyms. For clarity, this dissertation is using the concept *learning environmental boundaries*.

sible to narrow it down to specific domains such as e-learning. In this context, they use the concept of e-learning ecosystem (ELES). This allows the identification and study of characteristics that are specific to ELES, such as learning communities and other stakeholders, digital learning tools and conditions specific to e-learning. This dissertation uses the *digital learning ecosystem* (DLE) as a general concept for describing learning ecosystems in TEL domain. This concept also covers e-learning ecosystems, but is more in line with recent developments in TEL.

Laanpere, Põldoja and Normak (2013) argue that DLE's represent the third generation of learning systems. In this interpretation, offline learning systems (educational desktop software, multimedia CD-ROM's) and virtual learning environments (LMS's, computer-based assessment tools, etc.) stand as previous generations of learning systems. Specific software architecture, pedagogical foundations, content management approach and affordances characterize all three generations of learning systems. These main characteristics are summarized in Table 2.

Table 2. Generations of learning systems (based on Laanpere et al., 2013)

Dimension	Offline learning systems	Virtual learning environments	Digital learning ecosystems
Software architecture	Desktop software	Single-server monolithic system	Cloud architecture, SOA, mobile clients
Pedagogical foundation	Operant conditioning	Pedagogical neutrality	Social constructivism, connectivism
Content management	Content was integrated	Separated from software, reusable	Web-based, embeddable, located outside, rich metadata, openly licensed
Dominant affordances	Presentation, drill, test	Presentation, assignments	Reflection, sharing, remixing, tagging, mashups, recommenders

While VLE's were typically built as single-server monolithic systems, DLE's consist of multiple could applications that are based on service-oriented architecture. Pedagogically, DLE's can be associated with social constructivism and connectivism (Anderson & Dron, 2011). Learning content is typically located in the open Web and can be embedded in different learning tools used in the ecosystem. Dominant affordances of DLE's include reflection, sharing, remixing, tagging, mashups and recommenders.

When looking at these characteristics, it is possible to argue that open education could be seen as one example of digital learning ecosystems. Also it is possible to look at specific areas of open education (open educational resources, open online courses) as independent examples of digital learning ecosystems. The following section discusses some of the ecosystem approaches in open education.

2.3.3 Ecosystem Perspectives on Open Education

In June 2007, a group of open education scholars and activists gathered for the education track at the iCommons Summit[22]. Among other topics, the participants discussed the open education movement, suggesting it could expand its focus beyond content. One of the concepts that evolved in the discussions was the open education ecosystem. Schmidt and Surman (2007) made a summary of these discussions. Based on the sketches drawn by the participants, they visualized the structure of the open education ecosystem. In this interpretation, key components of the open education ecosystem included people, content, tools, communities and organizations. In addition to these five key components, there were processes that described the relations and interactions between the components of the ecosystem. The behavior of the ecosystem is influenced by a loosely agreed set of common values. Schmidt and Surman (2007) do not refer to the research on digital ecosystems. However, their model of the open education ecosystem could be mapped according to the learning ecosystem model developed by Chang and Guetl (2007). This mapping is presented in Figure 4.

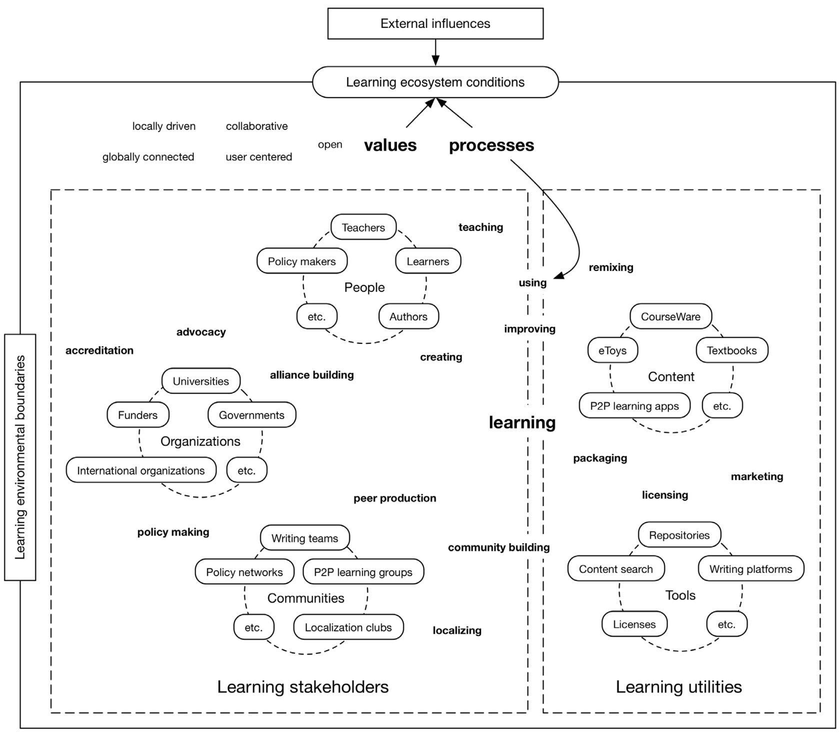

Figure 4. Open education ecosystem as a learning ecosystem (based on Schmidt & Surman, 2007; Gütl & Chang, 2008)

[22] iCommons Summit was the annual meeting of Creative Commons and other commons-oriented movements

When examining this scheme of open education ecosystem, it is important to keep in mind, that this was developed at the time when the open education movement focused mostly on content. People, organizations and communities would belong to the biotic part of the ecosystem. The abiotic part of the ecosystem is made up of content and tools. Schmidt and Surman (2007) did not discuss the borders of the open education ecosystem, but it can be argued that these borders could be defined by the shared values. Values and processes represent internal influences on the learning ecosystem conditions.

Several authors have used the concept of infrastructure, when discussing tools and services for open education. Infrastructure refers to fundamental services and facilities that are needed for a certain area to function, for example electrical grid, roads and communication networks. Infrastructure consists of human-made components that are built into the ecosystem. In the case of the open education ecosystem (see Figure 4), the learning utilities form an infrastructure. The digital ecosystem is a wider concept than infrastructure since it emphasizes the socio-technical, self-organizing and crowd-based aspects. Atkins et al. (2007) use the concept of *open participatory learning infrastructure*, which consists of organizational practices, technical infrastructure and social norms. However, they do not go into detail and discuss components of the technical infrastructure. Duval et al. (2011) have used the concept of *open learning infrastructure* for describing the tools and services developed for supporting the complete lifecycle of open educational resources.

The most holistic discussion of the infrastructure for open education is published by Wiley (2015). Wiley proposes four core components for the *open education infrastructure*: (1) open credentials, (2) open assessment, (3) open educational resources, and (4) open competencies. Wiley sees open competencies as the fundamental component, since all other components (OER, assessment tasks, credentials) should be connected to specific competence models. Open education infrastructure would need tools and services that support creating, sharing, reusing, revising and remixing of all four components. In the learning ecosystem model by Chang and Guetl (2007), these would be classified as learning utilities.

In addition looking at the open education ecosystem as a whole, it is also possible to distinguish several smaller ecosystems. A number of authors have discussed the OER ecosystem (Mackintosh, 2012; McAndrew & Farrow, 2013; Yuan, Robertson, Campbell, & Pegler, 2010). Also, open online courses could be seen as independent ecosystems (Pata & Bardone, 2014).

This dissertation is using the concept of *open education ecosystem* to refer to open education as a learning ecosystem. As pointed out by Brown and Adler (2008), ecosystem and infrastructure have different connotations. Infrastructure is often associated with heavyweight predesigned artifacts. Ecosystems, on the other hand, are associated with interaction between the components, loose connections, balance and self-organizing capabilities. Several scholars have used the concept of OEE (Mackintosh, 2012; Meiszner & Papadopoulos, 2012; Lesko, 2013; Schmidt, Geith, Håklev, & Thierstein, 2009). Most of them however have remained at the metaphorical level. Meiszner & Papadopoulos

(2012, p. 1) have defined the open education ecosystem as “the wider socio-technological system that might consist of a number of OEFs and the various resources of such OEFs, including the stakeholders that are populating this ecosystem”. This definition refers to open educational frameworks (OEF), which are understood as being organizational frameworks embedded within a technological system. For this dissertation, the open education ecosystem is defined as a learning ecosystem that consists of tools, services, resources and stakeholders who share a common set of values. The core value that defines the extent of the open education ecosystem is openness.

2.4 Design in Context

In the previous section we looked at open education as a digital ecosystem. Complex digital ecosystems consist of a number of tools and services which each have a specific role. These tools and services are used by learning stakeholders who have their personal goals and expectations of the tools they are using. Processes taking place in the open education ecosystem are influenced by various internal and external influences. Designing tools and services for this kind of digital ecosystem is a complex issue that requires a thoughtful approach from the designers. This section will discuss design in the context of digital learning ecosystems.

2.4.1 Design Approach

Design has been divided at various times into different design fields such as architecture, interior design, industrial design, graphic design, fashion design, etc. This dissertation focuses on the design of online learning tools, which is related to several contemporary design fields. The design of any digital artifact requires interaction design. In the case of learning tools, there are some underlying pedagogical ideas that are embedded in the design, and thus it is related to instructional design. A lot of technical decisions and compromises made during the design process are related to software design. Finally, educational systems design should be taken into account in order to understand how the design fits into a larger context.

Interaction design can be considered as the main design discipline for this dissertation, therefore the design approach is explained in the context of interaction design. In a basic sense, interaction design is about defining the structure and behavior of interactive systems. Löwgren and Stolterman (2007, p. 5) define interaction design as a “process that is arranged within existing resource constraints to create, shape, and decide all use-oriented qualities (structural, functional, ethical, and aesthetic) of a digital artifact for one or many clients”. This definition points out the broad scope of interaction design. Interaction design is related to a number of a number of academic disciplines (computer science, psychology, ergonomics, social sciences, etc.) and design practices (graphic design, industrial design, service design, etc.).

Nelson and Stolterman (2012, p. 225) argue that design should be seen as a third tradition, a midpoint between the sciences and the arts. Design is related to the applied side of arts (craft) and applied side of sciences (technology). While natural sciences investigate the world as it is, design has an intention of changing the world by introducing human-made artifacts. Löwgren and Stolterman (2007, p. 31) have summarized the essential difference between science and design as follows: “a researcher is interested in reality whereas a designer is interested in what reality could become”. Nelson and Stolterman (2012, p. 41) point out that one of the key characteristics of design is focus on service. Science and arts can be seen as *self-serving* areas where the scientists and artists are driven by their own curiosity and need for self-expression. Design is an *other-serving* field since there is a service relationship with the client.

Design is often discussed from the process perspective (Löwgren & Stolterman, 2007, Chapter 2). The design process takes place in a specific context known as the *design situation*. Two concepts that are related to the design process are the *problem* and the *solution*. The problem refers to how a designer currently understands the design situation. Often, design problems cannot be easily formulated, since they may have incomplete, contradictory, and changing requirements. These kinds of problems are known as *wicked problems* (Rittel & Webber, 1973). The design process is about exploring different possibilities and some authors see the design process as *informed guessing* (Leinonen, 2010, p. 67) The beginning of the design process can be seen as *divergence*, the situation in which the designer is looking in the wider context and considering a number of alternative solutions. In later phases of the design process, the designer has to narrow down the choices and focus on one specific solution or a synthesis of different ideas. This formation of a deeper understanding and more refined design proposal is known as *convergence* (Löwgren & Stolterman, 2007, p. 29–30).

There are a number of process models for interaction design (Brinck, Gergle, & Wood, 2002, p. 16; Cooper, Reimann, & Cronin, 2007, p. 24; Leinonen, Toikkanen, & Silfvast, 2008; Preece, Rogers, & Sharp, 2007, p. 444–463), but these cannot be taken as universal recipes. Each design situation is unique and requires thoughtful thinking to combine the most suitable design methods. Löwgren and Stolterman (2007) see the design of the design process as a vital aspect of design. The design cases included in this dissertation follow the research-based design model proposed by Leinonen et al. (2008). This model is based on four iterative stages: (1) contextual inquiry, (2) participatory design, (3) product design, and (4) the development of software prototype as hypothesis. The software prototype can be seen as hypothesis since it aims to answer the design challenges identified in the earlier phases of research. These four stages of the research-based design provide a general framework for the design process while leaving the designer a freedom to choose appropriate interaction design methods during each stage.

Design can be also seen as a form of communication in which the designer will externalize the design thinking through creating various representations of the designed artifact. Löwgren and Stolterman (2007, p. 28) discuss three basic purposes for creating representations during the design process: forming ideas, communicating with oneself, and communicating with others. Common representations and design artifacts created in interaction design include personas, scenarios, concept maps, user stories, paper prototypes, wireframes, site maps, and various functional prototypes. According to Schön (1991, p. 79), good design process requires reflective conversation with the design situation. This conversation allows the designer to realize consequences of the design decisions and changes in the design situation. Representations and artifacts created during the design process empower the designer to start this reflective conversation with oneself or with others.

One design approach, that emphasizes the active involvement of all stakeholders from the early design process is participatory design (Ehn, 1992). In software development, participatory design approach could be used in various phases. For example, scenario-based design (Carroll, 2000) could be done in a participatory way. The initial scenarios prepared by the designers will be discussed and revised with the stakeholders in the participatory design session. Participatory design approach could be also used with writing user stories and sketching paper prototypes.

When working with people, the designer has to take various roles. Dahlbom and Mathiassen (as cited in Löwgren & Stolterman, 2007, p. 36–37) distinguish between three possible roles for an interaction designer. The *computer expert* offers technical expertise but follows the requirements as specified by the clients and users. The *socio-technical expert* looks not only at the technical solutions, but envisions how the social and organizational factors could be redesigned together with the software design. The *political experts* do not see software design as a neutral activity, but argue that the design should empower a specific group of users. When choosing an appropriate role, the designers have to look not only at the specific project, but also think about their social and ethical responsibilities regarding the wider impact of their design.

2.4.2 Pattern Languages in Design

The previous section discussed that one of the fundamental aspects of design is communication. This communication involves designers and other stakeholders who come from various fields and might not be acquainted with design methods. Therefore, it is argued (Erickson, 2000) that design projects need a common language — *lingua franca* — that is co-created and understood by all the participants involved in the project.

One approach to establishing a common language is to use pattern languages. In the late 1970s, the architect Christopher Alexander and his colleagues developed the original idea of pattern languages (Alexander, 1979; Alexander, Ishikawa, & Silverstein, 1977). According to Alexander, every building and every town is made up of certain recurring entities which he calls patterns. Alexander argues that the use of patterns would support the design of environments that have a quality that is difficult to express in words, a quality that could be called “the quality without a name”. The use of a pattern language makes it possible to create an infinite variety of unique buildings and places, just like ordinary language makes it possible to compose an infinite variety of sentences. Alexander composed a network of 253 patterns that describe spaces and buildings at different levels, from regional level (INDEPENDENT REGION) to small things like family pictures and travel souvenirs that make the place alive (THINGS FROM YOUR LIFE)(Alexander et al., 1977). Alexander's patterns are not just descriptions of the spaces and buildings, but they are closely connected to the events that take place in these spaces. Each pattern consists of three parts: description of the *context*, *conflicting forces* and recommended *configuration*. None of the individual patterns are isolated, but each pattern is loosely connected to the smaller patterns it contains and the larger patterns within which it is contained. For example, STREET CAFE belongs to larger patterns of IDENTIFIABLE NEIGHBORHOOD, ACTIVITY NODES and SMALL PUBLIC SQUARES. The street cafe pattern contains a number of smaller patterns, for example OPENING TO THE STREET, A PLACE TO WAIT, DIFFERENT CHAIRS, and a CANVAS ROOF (Alexander et al., 1977, p. 436–439). The power of Alexander's pattern language lies in the fact that the patterns are simple enough to share from person to person. In this way it enables non-architects to participate in the design of their environments.

The idea of dissecting complex solutions into a network of reusable patterns can also be applied in other fields besides architecture. In the 1990s, the design patterns became used in software engineering to describe recurring solutions to common problems in software design (Gamma, Helm, Johnson, & Vlissides, 1994). The pattern languages have attracted interest also in the human-computer interaction community (Dearden & Finlay, 2006; van Welie & van der Veer, 2003). More widely known practical examples of pattern languages are the web design patterns (van Duyne, Landay, & Hong, 2007).

The design patterns approach has also been explored in technology-enhanced learning for more than a decade. Some of the first publications on this topic suggested that patterns could provide a simple and understandable format to capture and share effective learning designs between the practitioners and with the researchers of TEL (Baggetun, Rusman, & Poggi, 2004; Derntl & Motschnig-Pitrik, 2003). Goodyear et al. (2004) discussed the possible pattern language for networked learning and compared it with Alexander's patterns. They suggested the PROGRAMME OF STUDY as the largest independent pattern for networked learning (equal to Alexander's INDEPENDENT REGION pattern). Lower level patterns would include building blocks of courses such as UNIT OF STUDY and MODULE, but also individual pedagogical techniques such as DISCUSSION GROUP or ROLE PLAY. In a later publication, Goodyear (2005) proposed that patterns for networked learning could be divided in three categories: tasks, organizational forms, and learning environment. Rohse and Anderson (2006) see adaptation, self-organization, emergence, and expression of values as key characteristics that make pattern languages valuable for education. Typically, the patterns are written in a way that they must be interpreted and adapted to specific context. The self-organizing aspect of patterns is related to the interdependencies between the patterns. The emergence of new patterns results from the repeated use of good patterns.

Finally, the patterns should not be pedagogically neutral but should carry certain educational values.

An important issue related to pattern languages is the process of identifying design patterns. For Alexander and his colleagues it took years of collaboration to compose their pattern language. In the context of education, Baggetun et al. (2004) suggest combining inductive (from specifics to generalizations) and deductive (from generalizations to specifics) approaches for identifying patterns. Brouns et al. (2005) discuss the possibility of using IMS Learning Design to detect patterns in existing courses. However, this approach would require that the courses are structured in a machine interpretable way. Retalis, Georgiakakis, and Dimitriadis (2007) have suggested a four step approach for identifying design patterns for e-learning systems: an analysis of the functionality offered by the existing systems, developing scenarios for learning activities, comparing how the existing systems support these learning activities, and constructing a pattern language for a specific genre of e-learning systems. This approach can be considered too tool-centered. In the educational context it is important to recognize also these patterns that are not necessary mediated by the use of technology. Gibbons (2014) proposed the most advanced method for identifying patterns in educational context. He argues that any instructional design could be divided to a number of independent layers that influence each other. Gibbons (2014, p. 34) proposed a set of seven layers for common instructional designs: content, strategy, message, control, representation, data management, and media-logic layers. Instructional design patterns should be identified according to layers and taking into account the activities that take place on a certain layer and the influences the layer has on other layers. The order of going through the layers is depending on the context and is not fixed. As an example, Gibbons (2010) analyzed the activity of conversation and identified 77 patterns. Gibbons' approach was considered for this study, but it would have resulted in too large a number of small patterns. Therefore, this study follows Alexander's approach of moving from larger patterns towards smaller patterns.

The use of patterns helps to generalize recommended design decisions in a specific context. Design patterns can be seen as a democratic tool that allows the involvement of various stakeholders in the design process.

2.5 Summary

This chapter outlined the theoretical framework of the dissertation. In order to contextualize this research, I gave an overview of the historical development of technology-enhanced learning and open education. Although open education is commonly associated with open educational resources and MOOCs, there is a wider variety of open approaches to learning. Understanding the main research directions of TEL and different approaches to open education is important for discussing the designed tools in Chapter 4. This dissertation argues that open education could be seen as a digital ecosystem — the *open education ecosystem*. Theoretical underpinnings of digital ecosystems were presented in order to propose the structure of the open education ecosystem in Chapter 6. The final section of the theoretical framework chapter discussed the role of design in the context of this research with special emphasis on pattern languages. A set of design patterns for the open education ecosystem will be presented and discussed in Chapter 6.

3. Methodological Considerations

Combining design practice and research in a methodologically sound way is difficult. One approach to address the challenge is *constructive design research* in which new knowledge is developed through constructing actual design artifacts such as products, systems, spaces or media (Koskinen et al., 2011). This thesis studies the design of online learning tools and the open education ecosystem through designing and constructing five software prototypes. According to Koskinen et al. (2011), constructive design research aims to address limitations of earlier approaches such as user-centered design methodologies. People are often conservative and have difficulties in imagining things that do not exist yet. Therefore, relying only on user studies would result in small improvements rather than in breakthrough ideas. In constructive design research, designers build mockups and prototypes that help people to open up their imagination.

Fallman (2008) has proposed a model of interaction design research that places any design research activity between three interconnected activity areas: *design practice*, *design exploration*, and *design studies*. Fallman illustrates the model as a triangle where each activity area is in one corner (see Figure 5). *Design practice* covers design activities where the interaction design researcher takes a proactive role in the process for designing and developing practical and usable design solutions for a specific context and client. Design practice activities are similar to interaction design activities outside academic research. In design practice, the designed artifact is the primary outcome of the process. The role of research is to support the design decisions. *Design exploration* involves similar interaction design methods to design practice, but has different intentions. It mainly serves the researcher's own research agenda instead of an external client. Design exploration examines the possibilities outside of the current paradigms of use, technology, and economical boundaries. The activity area of *design studies* resembles more traditional fields of academic research. The goal of design studies is to contribute to the body of knowledge about design and to build an intellectual tradition within the field of design research. Unlike the other two activity areas, the focus of design studies is on describing and understanding rather than on creating and changing.

Fallman (2008) argues that an important part of this model is the possibility to move between different activity areas. While the actual methods and techniques used in these activity areas can be quite similar, each area takes a different perspective on design. Fallman uses three concepts to describe the movement within the model: *trajectories*, *loops*, and *dimensions*. Trajectories refer to planned moves or unintentional drifting between two or more activity areas or inside of a single activity area. In the model, trajectories can be drawn as simple lines with an arrow indicating the direction of the movement. Loops describe continuous movements between different activity areas. Dimensions are used to describe tensions between two or three activity areas. They are typically written outside the model. One possible dimension between three activity areas is True—Real—Possible. Design practice deals with what is real, design exploration explores what is possible, and design studies aim to describe what is true.

Fallman's interaction design research triangle provided a methodological framework for the research activities within this doctoral study. In general, this study can be divided into two phases operating in all three areas of activity:

1. *design practice* and *design exploration* on online learning tools;
2. *design studies* on challenges, patterns and structure for the open education ecosystem.

The first phase of the study consisted of five design cases in which online learning tools were designed and constructed. The design cases focused on three different contexts: authoring and sharing platforms for open educational resources, blog-based open online courses, and assessment and recognition of competencies. A more detailed description of the design cases follows in Chapter 5. The aim in the second phase of the study was to make generalizations from the design cases. These generalizations focused on summarizing the design challenges, identifying the design patterns, and analyzing the structure and components of the open education ecosystem.

In Fallman's interaction design research model, the design cases belong to the loop between design practice and design exploration (see Figure 5). OER authoring tool LeMill is closest to the area of design practice, as it was designed with a larger project taking into account the current practices of European teachers. However, the design of LeMill also explored new possibilities related to collaborative authoring and remixing of open educational resources. PILOT and LeContract explored the use of novel pedagogical methods such as progressive inquiry and learning contracts. Thus, these projects could be positioned in the area of design exploration. EduFeedr and DigiMina fall between design practice and design exploration. Both projects were initiated as a result of a practical need, but also explored new ways to support online learning.

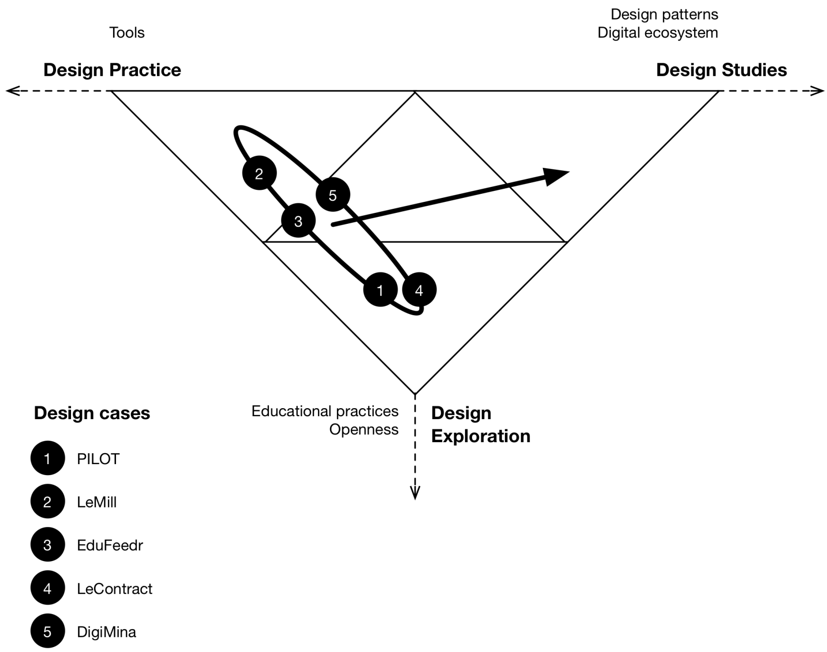

Figure 5. Activity areas of research (based on Fallman, 2008)

In the second phase of the study, the focus of research shifted towards design studies. This move between the activity areas is presented as a trajectory line in Figure 5. In this study, two dimensions can be identified between the activity areas:

- *Tools—Educational practices—Design patterns*. The activity area of design practice covers practical interaction design of online learning tools. The design of tools has to meet both teachers' everyday needs and my personal research interest in changing current educational practices. Challenges relating to new educational practices can be explored through designing prototypes that support these practices. The activity area of design studies aims to provide generalizations that can be applied in designing other online learning tools for a similar context. These generalizations are presented in a form of design patterns.
- *Tools—Digital ecosystem—Openness*. The second dimension of tensions is related to designing online learning tools as part of a digital ecosystem. The activity area of design practice focuses on the interaction design of individual tools. The activity area of design studies, on the other hand, is mainly interested in the relationships and interactions between the tools that form the open education ecosystem. Openness is an important factor both for designing the individual tools and structuring the open education ecosystem. Issues related to openness are examined in the activity area of design exploration.

The following sections discuss the concrete design and research methods used in the two phases of the study in more detail.

3.1 Design Practice and Design Exploration of Online Learning Tools

The first phase of the study involved a number of interaction design methods that were applied in the design cases. As discussed earlier in Section 2.4.1, interaction design can be seen both as a *process* and as a *communication*. The design cases upon which this study is built followed the research-based design model by Leinonen et al. (2008). In fact, LeMill was one of the design cases that contributed to the development of Leinonen's research-based design process model. This model divides the design process into four iterative phases: (1) contextual inquiry, (2) participatory design, (3) product design, and (4) production of software prototype.

The *contextual inquiry* phase aims to define the context and preliminary design challenges. This is done through answering questions such as "who", "what", "why" and "where". The outcomes of the contextual inquiry were documented using the persona method (Cooper et al., 2007). Personas are fictional characters that represent archetypical users of designed tool or service. Personas have a special focus on the goals that these users have related to the designed product. In this study, personas were used internally to build a common understanding of the target group within the design team. An example of a persona is presented in Publication 4.

The *participatory design* phase focuses on defining preliminary concepts. In this study, the scenario-based design method (Carroll, 2000) was used to formulate initial design ideas and to gather feedback from the stakeholders. Scenarios are short stories that describe how users interact with a system in a specific setting to complete their goals. Scenarios are evaluated with stakeholders (who often represent archetypical personas) in participatory design sessions. Scenarios in interaction design have some similarities to use cases in software engineering. Use cases describe alternative ways of reaching the goal, unwanted endings and reactions to possible exceptions (Salinesi, 2004). However, use cases are mainly used for specifying software requirements, while scenarios are used to envision the possibilities. Example scenarios are presented in Publications 1, 3, and 4. Concept mapping method (Novak, 2010) was used to summarize the results of the design sessions and to establish the user interface vocabulary for the next phases of design. Concept maps from the design cases are presented in Sections 5.2, 5.4, and 5.5.

The *product design* phase aims to define use cases, system architecture, and basic interaction with the system. The *user stories* method (Cohn, 2004) is used to document basic functions of the system by describing each software requirement in one or few sentences from the end user perspective. User stories provide textual description of the features but omit the details of the user interface. Paper prototypes (Snyder, 2003) or wireframes (Brown, 2010) were developed to create the preliminary user interface design. In the case of the DigiMina project, flow charts (Brown, 2010) were also created for planning interactions related to the assessment process.

The final phase of Leinonen's research-based design model is the *production of software prototype*, in which the functional prototype is built. Prototypes are potential solutions to the design challenges that were defined earlier in the design process. Functional prototypes were built in four of the design cases. The only exception was the LeContract project that only reached the product design phase.

The exact choice of interaction design methods is always dependent on the design situation. Fallman and Stolterman (2010) see the choice of methods as a consequence of designer's practice and experience. Yee (2010) argues that the "pick and mix" approach, in which established research methods are combined with practice-based methods, has become an established paradigm for design research. The experience from this study shows that the choice of methods is also dependent on the available resources such as team size and the division of roles.

3.2 Design Studies on Challenges, Patterns and Structure of the Open Education Ecosystem

The second phase of the study took a different perspective of the online learning tools and services that were designed. With a shift to the activity area of design studies, the focus changed from individual tools to the open education ecosystem. The general aims of this phase are described in Section 1.3 — understanding the structure of the open education ecosystem and providing research-based insights for designing online learning tools for open education. The research questions that frame this study (see Section 1.5) were reformulated several times during the process, as each new design case provided a better understanding of the context. Generalizations that were made from the design cases include a summary of design challenges (Q1), descriptions of recommended design patterns (Q2), and the structure of the open education ecosystem (Q3).

A multiple case study approach was used to capture new knowledge from the design cases. Yin (2014, p. 16) defines a case study as an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-world context. Case studies can be divided into single and multiple case studies, which may be holistic or embedded. This doctoral research deals with a multiple case study that involves five design cases. All the design cases are holistic, meaning that they do not include several units of analysis within a single case.

The process of content analysis (Berg, 2001) was used to study the design challenges related to open education. In each study reported in the publications, various challenges were recognized. The challenges were categorized into three groups by reconsidering, combining and encoding them (see Section 6.1).

The identification of design patterns combined inductive and deductive approaches, as recommended by Baggetun et al. (2004). The inductive pattern mining approach was used to identify the majority of the design patterns. These were generalizations from the specific instances of how the design challenges were addressed with the implementation of software prototypes or with the design of learning activities. Some patterns were based also on the deductive pattern mining approach. For example, one of the design patterns was derived from the *lurking* metaphor, which refers to the passive participation in online communities. Two sets of patterns were developed using Alexander's (1979, Chapter 16) approach for constructing pattern languages (see Section 6.2).

Modeling the structure of the open education ecosystem is based on the synthesis of all previous steps in this study. The use of multiple methods for developing the conceptual model of the open education ecosystem can be seen as a methodological triangulation (Cohen, Manion, & Morrison, 2007). The design and development of software prototypes contributed to the understanding of the components of the open education ecosystem and relations between them. Design studies about the design challenges and patterns helped in the conception of the general structure of the open education ecosystem (see Section 6.3).

4. Original Publications

This dissertation is based on five research publications, of which four were published in peer-reviewed journals (Publications 1, 2, 3, and 5) and one in the proceedings of an international conference (Publication 4). The publications are listed and discussed in the order in which the actual design work was started and not in the order of publishing the results. All five publications describe the design process of a different online learning tool for open education. The publiccations included present different phases of the design research. Publications 1 and 4 present the concept and early design phase of two novel online learning tools — *PILOT's* and *LeContract*. Publication 2 discusses an open educational resources authoring tool *LeMill*[23] that is already in use by thousands of teachers. Publications 3 and 5 present both the design process and a small-scale evaluation of *EduFeedr*[24] and *DigiMina*.

This chapter explains the context within which the research was carried out, describes the aims and main contributions of each publication and outlines my own role in both in the design process and in writing the publication. The designed online learning tools itself are discussed in details in Chapter 5.

4.1 Publication 1: Progressive Inquiry Learning Object Templates (PILOT)

Publication 1 presents the concept and discusses the design process of progressive inquiry learning object templates (PILOT's). The original idea of PILOT's emerged in discussions with my supervisor Teemu Leinonen. It is based on our earlier work with the Fle3 learning environment (Leinonen, Kligyte, Toikkanen, Pietarila, & Dean, 2003) and IVA learning management system (Laanpere et al., 2004). The use of these learning environments indicated that teachers and learners had difficulties with setting up authentic and challenging study topics for online discussions. Also, our aim was to alter the situation in which learning objects were used mainly for individual learning (reading, looking, playing, quizzes) or for presentations by teachers. As a solution we proposed a template for creating rich media learning objects that can be used for engaging learners in the collaborative knowledge building processes. The design of PILOT's started initially as a small-scale research experiment that was

[23] http://lemill.net

[24] http://www.edufeedr.net

not part of any officially funded research project. Publication 1 summarizes the outcomes of the initial design and prototyping that was carried out during 2004–2005. The work was later continued in a large-scale European research project called Calibrating eLearning in Schools (CALIBRATE) (2005–2008). My role in this work was to formulate the structure of PILOT's, to design the visual representation and to develop the first rich media prototypes. In later phases during the CALIBRATE project I was responsible for prototyping the authoring interface, writing the design specification for software developers and testing the implementation.

The pedagogical concept of PILOT's is based on the theoretical model of progressive inquiry (Muukkonen et al., 2004). Progressive inquiry is an iterative learning process in which the teacher creates the context, assists learners in setting up research questions, constructing working theories, evaluating their theories critically, and searching for scientific knowledge. This leads to establishing new questions, developing new working theories, and gaining shared expertise. The technical implementation of PILOT's is influenced by the learning objects approach in late 1990s and early 2000s. The publication discusses important issues in teaching with PILOT's, such as the importance of authentic context (Bransford, Sherwood, Hasselbring, Kinzer, & Williams, 1990; Christiansen & Anderson, 2004) in editing and reusing PILOT's.

The main contribution of Publication 1 to this dissertation is that it introduces a number of themes that are present in each of the five design cases and also partly in the publications as well. These themes include social constructivist learning approaches, user generated content and scenario-based design methodology (Carroll, 2000).

In the writing of Publication 1, I was responsible for describing the design and development of PILOT's. Teemu Leinonen assisted me with structuring the paper and formulating the research problems. Sections relating to the pedagogical foundations and research problems were written together by us. The other authors contributed to the design process of PILOT's.

4.2 Publication 2: Information Architecture and Design Solutions Scaffolding Authoring of Open Educational Resources

Publication 2 discusses the design of an online authoring tool for creating and sharing open educational resources. The LeMill tool presented in Publication 2 was designed and developed in a large-scale European research project called Calibrating eLearning in Schools (CALIBRATE) (2005–2008). After the end of the CALIBRATE project we continued the development and dissemination of LeMill within the context of local projects in Finland and in Estonia. In the LeMill project, I played multiple roles. My main responsibility was the user interface and interaction design of the LeMill tool. In order to understand teachers' needs, I run the participatory design sessions with the Estonian teachers and carried out a large number of teacher training workshops in Estonia and in several other countries. Also, I was active in testing the system and documenting the defects.

This publication continues the theme of digital learning resources that was started in Publication 1. Instead of focusing on one very specific type of learning resource, it takes a wider perspective on how digital learning resources could be co-authored and shared online. At that time, the focus of research in technology-enhanced learning was shifting from learning objects to *open educational resources*. Publication 2 studies the question of how a web service design can promote the use and creation of open educational resources. It defines five design challenges that hinder the use of OER's in European schools and presents the design solutions that have been implemented in LeMill to address these challenges. Theoretically, this paper deals with the design methodology (Leinonen et al., 2008), social and legal issues related to the reuse of OER's (Möller, 2007; Schaffert & Geser, 2008), and topics related to learning objects (Friesen, 2004; Parrish, 2004), learning object metadata (Duval & Hodgins, 2004) and interoperability (Nilsson, Johnston, Naeve, & Powell, 2007).

Both, the Publication 2 and the LeMill tool both play an important role in this dissertation. Publication 2 introduces the main theme of the dissertation — *open education*. It also introduces the concept of the *OER ecosystem,* when discussing tools and practices related to use of OER's. The design solutions presented in the paper illustrate the way in which we have relied on the ecosystem thinking that sees the open Web formed from small pieces loosely joined (Weinberger, 2002). Furthermore, Publication 2 introduces the research-based design methodology (Leinonen et al., 2008) that has also been applied in the later design cases.

In the process of writing Publication 2, I contributed mostly to the sections that described the design process and the implementation of design solutions in the LeMill software. I also wrote the section related to the licensing of OER's, created the concept map of LeMill and made minor edits to other sections.

4.3 Publication 3: Design and Evaluation of an Online Tool for Open Learning with Blogs

Publication 3 presents the design and evaluation of an online tool for open learning with blogs. Initial motivation for designing and developing the EduFeedr tool came from an open online course that we organized together with Teemu Leinonen in the spring of 2008 (Leinonen et al., 2009). The aim of the course was to promote the use of open educational resources and LeMill. The course was designed so that each participant used their personal blog to reflect on the course topics. Our experience with using blogs in course context led me to the conclusion that there is a need for a coordination tool that would simplify the management of such courses and monitoring them. In the EduFeedr project, I was the author of the original concept, interaction designer, manager of the project and software tester. The first prototype of EduFeedr was launched in 2010. A number of publications were also written about the initial design and implementation of EduFeedr (Põldoja, 2010; Põldoja &

Laanpere, 2009; Põldoja, Savitski, & Laanpere, 2010). Publication 3 explains the reasoning behind the design decisions and discusses the results of an evaluation study in 10 courses that was carried out in 2013.

Publication 3 provides an overview of some of the recent research on using blogs in online courses (Kim, 2008; Sim & Hew, 2010). It discusses some of the critical issues in blog-based courses such as fragmented discussions, lack of coordination structures, poor support for awareness and the danger of overscripting. The main aim of the paper is to study how and to what extent can an online tool address these issues. The theoretical basis of these issues lies in the coordination theory (Malone & Crowston, 1994), awareness (Carroll, Neale, Isenhour, Rosson, & McCrickard, 2003) and pedagogical scripting (Dillenbourg, 2002). Publication 3 continues the theme of open education by relating our work to the contemporary discussion about MOOCs (Fini, 2009; Kop et al., 2011; Rodriguez, 2013).

The main contribution of Publication 3 in the dissertation is that it extends the focus of the study from open educational resources to open learning environments. Blog-based learning environments and the wider blogosphere are discussed as examples of digital ecosystems.

I was the main author of Publication 3. My co-authors assisted me with formulating the research questions, planning the evaluation study and discussing the results of the evaluation.

4.4 Publication 4: Externalization of a PLE: Conceptual Design of LeContract

Publication 4 presents the design process and the conceptual design of the LeContract tool, which attempts to support the personal learning contract procedure. The motivation for designing the LeContract tool came from my experiences in teaching open online courses. One of the challenges in these types of courses is to keep learners motivated and goal-oriented. One possible approach to achieve this is to encourage learners to write learning contracts, where they set their personal learning goals, resources and strategies needed to reach the goals, and criteria to evaluate their performance. So far, my colleagues and I have asked learners to use their blogs for writing learning contracts. However, having a special online tool would provide additional opportunities for writing learning contracts and connecting to other learners with similar learning goals. I developed the idea of LeContract in 2010. The initial idea was developed further in our discussions with my colleague Terje Väljataga. I created the personas and scenarios, organized participatory design sessions and developed a set of paper prototypes. However, LeContract is still in the design phase and we have not started with the actual software development.

The pedagogical concept of LeContract is based on the learning contract method (Anderson et al., 1996). The pedagogical and technical implementations are both influenced by the personal learning environments approach (Johnson & Liber, 2008). This approach allows learners to take control of their learning goals and their learning environment (Väljataga & Laanpere, 2010). Technically, LeContract was designed as a piece of social software that allows learners to connect with each other and to form a distributed learning environment (Fiedler & Pata, 2009) in which learning contracts are embedded in learners' PLE's.

The main contribution of Publication 4 for this dissertation is that it addresses some of the pedagogical issues related to open learning environments. Also, it introduces the topic of self-assessment, that is developed further in Publication 5.

As the main author of Publication 4, I was responsible for structuring the paper, reporting the design process and presenting the conceptual design of LeContract. Terje Väljataga wrote the introduction, proposed the structure of the learning contract template and provided some insights into other sections of the paper.

4.5 Publication 5: Web-based self- and peer-assessment of teachers' digital competencies

Publication 5 presents the design and evaluation of a web-based system for assessing teachers' digital competencies. The system called DigiMina (*DigitalMe* in Estonian) was designed and developed in 2011 within the framework of the Estonian national development program for education sciences and teacher education (Eduko). The rapid technological changes in society require that teachers acquire new kind of digital competencies. Our aim in DigiMina project was to develop an assessment framework and to design an online tool that allows teachers' to assess their digital competencies. In the DigiMina project, I was responsible for leading the design and development of the software prototype.

The paper compares a number of frameworks for digital competencies and explains reasons for choosing NETS-T (National Educational Technology Standards for Teachers) framework developed by the International Society for Technology in Education (ISTE)(ISTE, 2008) as the most appropriate for the Estonian context. The assessment framework is based on the previous studies of competency assessment in the clinical context (Miller, 1990) as well as in the educational context (Calvani, Cartelli, Fini, & Ranieri, 2008; Cumming & Maxwell, 1999; Gulikers, Bastiaens, & Kirschner, 2004). The assessment framework developed in Publication 5 is not focused strictly on open education but in technology-enhanced learning in general. However, the design of DigiMina follows the principles of openness and digital ecosystems.

The main contribution of Publication 5 for this dissertation is that it explores how peer-assessment and public competency profiles could make the teachers' professional development more open.

In Publication 5, I wrote the sections on the design methodology, conceptual design, and software implementation of DigiMina. Also, I contributed to the introduction, conclusions, and the validation study. The paper was structured together with co-authors. My co-authors also wrote sections related to teacher's digital competencies and earlier studies on measuring digital competencies.

5. Tools Designed

The previous chapter briefly described the research publications included in this dissertation. Each of the publications is based on the design process of one specific online tool for supporting open education. This chapter will provide more detailed descriptions of the tools designed. Understanding the design of these tools is important for discussing the related design challenges, the role of these tools in the open education ecosystem, and the design patterns that could be identified based on these design cases.

The tools were designed and developed during the years 2004 to 2012. The chronological timeline of design research is presented in Figure 6. During 2004–2007, the main design context was authoring and sharing platforms for open educational resources. Two tools designed during this period were the PILOT learning resource template and the LeMill platform for authoring and sharing open educational resources. The PILOT template was integrated into the LeMill platform. Between 2008 and 2010 the design context expanded from OER to other open educational practices such as open online courses. Two tools were designed during that time: EduFeedr for managing and monitoring blog-based open online courses and LeContract, for supporting the use of the learning contract method. Organizing blog-based open online courses with teachers revealed the differences in teachers' educational technology competency. During 2011–2012, this led to the design and development of the DigiMina platform for assessing teachers' educational technology competencies. After 2012 the focus of research shifted from developing individual tools to studying how the designed tools form a digital ecosystem and identifying recommended design patterns.

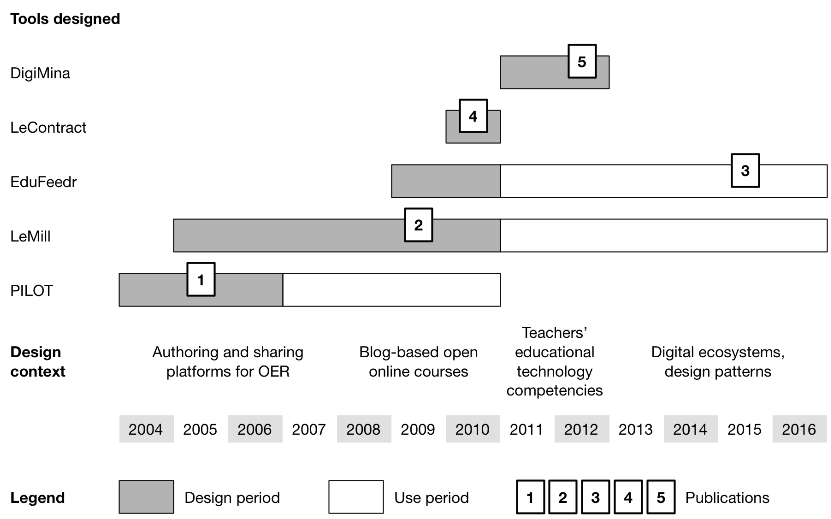

Figure 6. Chronological timeline of design research

The designed tools reached a different level of maturity. Two of the designed tools — LeMill and EduFeedr — gained a wider popularity among the teachers and are still in use. The PILOT template was available for LeMill users between 2006 and 2010. LeContract remained as a design concept that was not developed into actual software product. DigiMina software was developed and evaluated in teacher trainings. For various reasons it was not taken into wider use. Figure 6 also lists the research publications included in this dissertation. Publications are added to the timeline on the years they were submitted and accepted. In some cases the publications do not reflect the final design of the tools as the design process has continued after submitting the publication.

5.1 PILOT

PILOT (Progressive Inquiry Learning Object Template) is a multimedia learning object template for supporting the use of progressive inquiry method. The template is used to create multimedia clip consisting of a number of slides that present the new topic. Each slide in the created multimedia clip has a voiceover recording in which the teacher is explaining the topic and background image that helps learners to visualize the topic, and important keywords that are displayed to anchor new knowledge. The final slide has a list of initial research questions. After watching the PILOT multimedia clip, learners have an initial idea of the topic they are going to study and are able to come up with additional research questions that they are interested in.

The first prototype of PILOT was implemented in 2004 using Macromedia Flash 7. The original idea was that it should be possible to use PILOT as a template that teachers can customize according to their students' needs. However, editing PILOT's with Flash multimedia authoring platform was not a feasible solution for wider use of PILOT's in schools, since Flash is a commercial piece of software and requires a certain level of skill to use. In 2006, it was therefore decided to include PILOT as one of the learning resource authoring templates in LeMill. The structure of the PILOT template is presented in Table 3. Each PILOT has one or more content scenes and a final scene with research questions.

Table 3. Structure of the PILOT template

Element	Scene element	Explanation
Title		Title of the PILOT resource
Short description		Short description of the topic
Full description		Full description of the topic, typically script of the recorded voiceover
Scene		One or more content scenes
	Background image	Background image for the scene
	Voiceover audio	Voiceover audio for the scene
	Keywords	Up to 3 keywords displayed during the scene
Final scene		
	Background image	Background image for the scene
	Voiceover audio	Voiceover audio with research questions
	Research questions	Up to 7 research questions displayed in the final scene and under the PILOT resource

The first version of PILOT authoring template was implemented in the LeMill version 1.1 released in October 2006. It was available until the release of LeMill 3.0 in November 2010. LeMill 3.0 was a major refactoring of the code and the PILOT template was not included due to limited resources. During a period of 4 years, teachers created 32 PILOT learning resources. The progressive inquiry method is especially suitable for subject areas that engage students in an in-depth inquiry. Therefore the most popular subject for PILOT's was biology, but there were also a number of PILOT resources for basic education, special education, and other subjects. An example of PILOT with research questions (in Estonian) is presented in Figure 7[25].

[25] Research questions in Figure 7 are in Estonian. The translation to English is as follows: Which kind of forests have you visited? What is a forest? Why different types of forests grow in particular places? Which layers of plants occur in forests? Which animals live in forests?

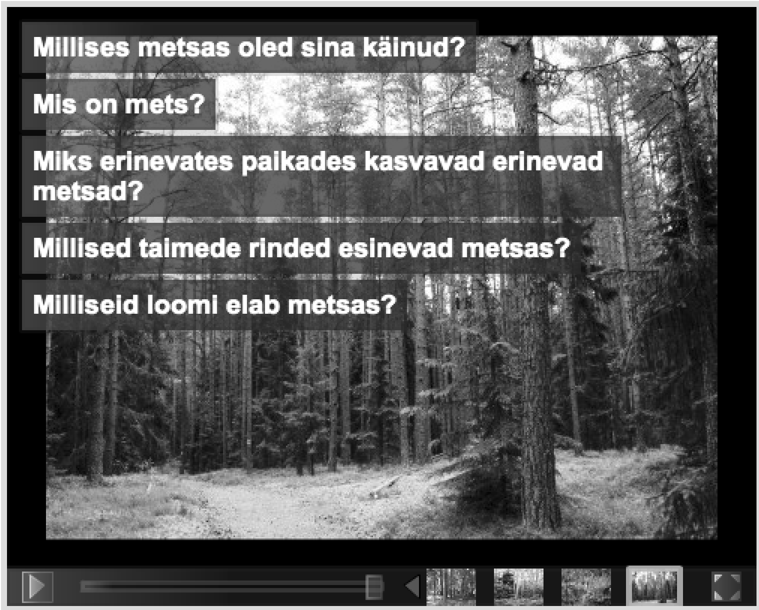

Figure 7. PILOT movie with research questions

The PILOT player includes scroll bar that allows users to scroll to a specific moment in the resource, thumbnail images that link to the beginning of each scene, and a possibility to watch the movie in full screen. The PILOT resources were intended for use in the Fle3 learning environment that had a special discussion area based on the progressive inquiry method. However, feedback from the teachers revealed that in many cases PILOT resources were used in the classroom to introduce a new topic and encourage students' discussions. There are also cases where students were involved in creating PILOT resources. For example, a group of basic school students prepared a play based on "Little Red Riding Hood" by Charles Perrault, took photos of the play, recorded audio clips and compiled the PILOT resource.

5.2 LeMill

LeMill is a software tool and a web community for finding, authoring and sharing open educational resources. The design of LeMill began in fall 2005 and the first prototype was launched in May 2006. At that time, most of the learning object repositories were designed as database systems where teachers could upload learning resources as files or add links to resources in external sites. The design of LeMill was inspired by collaborative authoring platforms such as Wikipedia and social networking services. The aim was to establish a community of teachers who can collaborate on creating and improving learning resources. The design and development of LeMill lasted for a number of years with the last major release being in 2010.

LeMill software was divided into four sections: *content*, *methods*, *tools*, and *community*. The content section provided several templates for creating learning resources, such as *web page*, *presentation*, *exercise*, *lesson plan*, *school project*, and *PILOT*. The purpose of templates is to scaffold the authoring process and achieve consistency between learning resources. In addition to using these templates it was possible to upload *media pieces* (images, sound clips, movie clips, Flash animations) and add *references* to external resources. To enrich the possibilities of LeMill, it was possible to embed external content into web pages and exercises. This allowed teachers to integrate various content such as videos, presentations, quizzes, interactive mind maps and timelines with LeMill resources. In order to enable remixing of content, all the resources created inside LeMill were published under Creative Commons Attribution-ShareAlike license. The front page of the content section is presented in Figure 8.

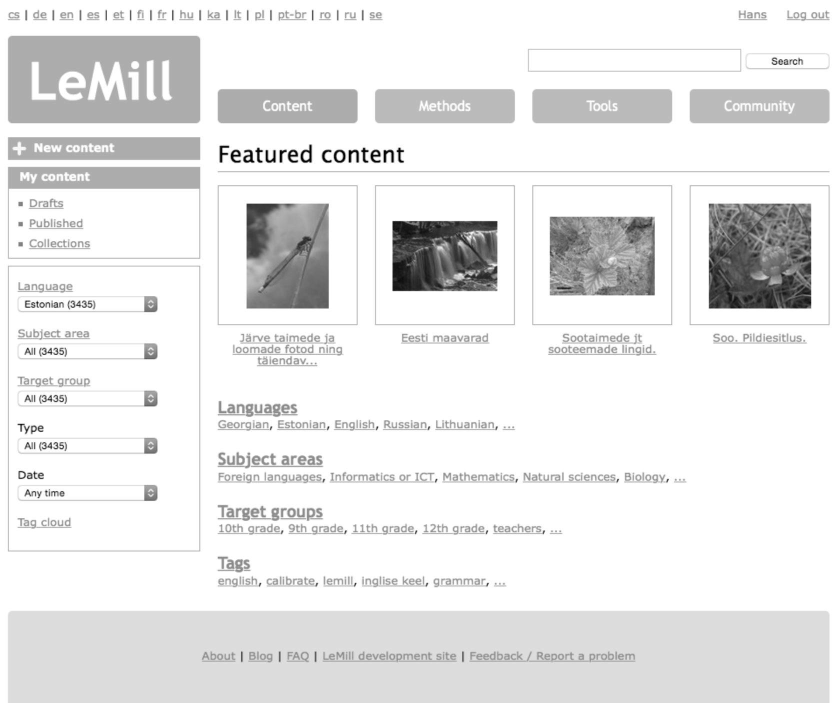

Figure 8. Front page of the content section of LeMill

To emphasize the importance of pedagogical practices with using open educational resources, there were separate sections for descriptions of pedagogical methods and educational tools. Teachers were able to group together related content, methods and tools into *collections*. With the collection, it was also possible to write a *teaching and learning story* that provided pedagogical guidelines and teacher's reflection about using the collection. In the community section, teachers were able to form groups and communicate with their peers. The structure and main concepts of LeMill are presented in Figure 9. Important design decisions behind LeMill are presented as design patterns for collaborative authoring of OER's in Section 6.2.1.

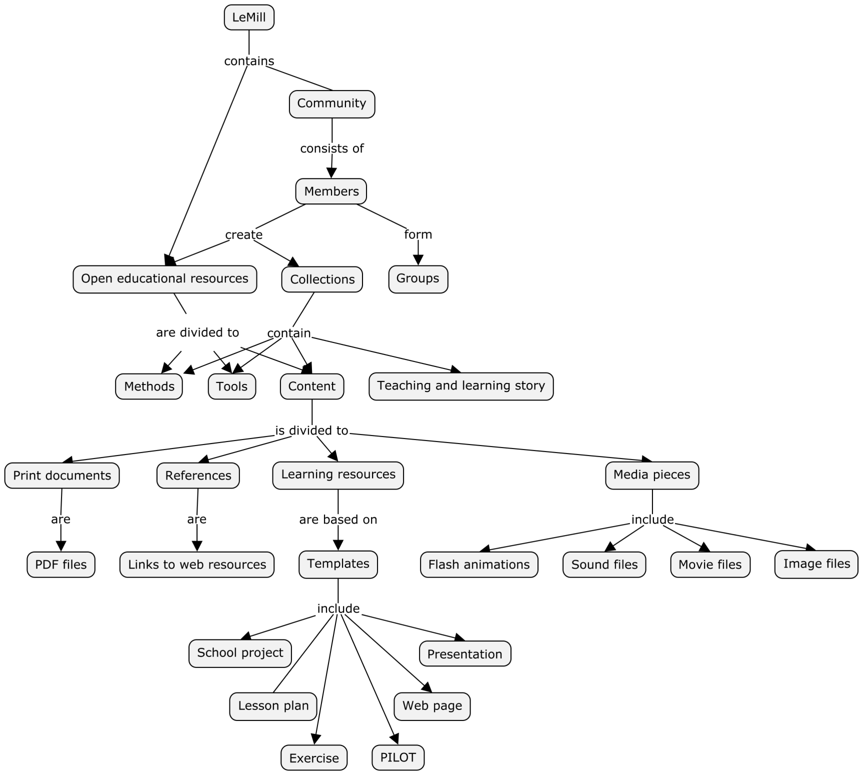

Figure 9. Main concepts of LeMill

LeMill software was translated into 15 languages and used by teachers in a number of countries. At the time of writing, there were 43,000 registered members from 82 countries. All together, they have published 73,000 learning resources in 88 languages. However, the majority of LeMill users are from two countries where it has reached critical mass of members and content. Approximately 70% of LeMill visitors are from Georgia and 15% from Estonia. The remaining 15% is from all other countries.

5.3 EduFeedr

EduFeedr is an online tool for managing and following open online courses where learners use their personal blogs. While the use of blogs has a number of pedagogical benefits (Goktas & Demirel, 2012), blog-based learning environments lack a number of coordination features that are common in learning management systems, such as enrollment in the course and the management of assignments. The distributed nature of blog-based learning environments makes it also more complicated to follow the discussions and be aware of updates. EduFeedr aims to solve these issues.

EduFeedr software was designed and developed mostly during 2009 and 2010, some of the features have been added or improved later. EduFeedr focuses on providing platform for running open online courses. Any EduFeedr user can set up a course by specifying the location of the course blog and important dates (enrollment deadline, beginning and ending date for the course). Learners can enroll to the course by submitting their blog address and e-mail. Since EduFeedr is designed for open online courses, any learner who has a blog on a supported blogging platform can enroll in the courses. Currently, EduFeedr supports two of the most widely used blogging services — WordPress[26] and Blogger[27].

Each course is divided into six sections. *Course feed* page displays the latest blog posts and comments from course blog and learners' blogs. *Course info* page displays general information about the course. *Participants* page displays a list of participants and provides combined RSS (Rich Site Summary) feeds for all course blogs in OPML (Outline Processor Markup Language) format. A logged-in facilitator can also access participants' e-mail addresses and download a list of participants in various formats (vCard for importing into address book, spreadsheet for grading the assignments). In the *assignments* page the facilitator can specify assignments and deadlines. Assignments are published as blog posts in the course blog. Two last sections of EduFeedr display visualizations based on aggregated data. *Progress* page visualizes submitted assignments and *social network* page displays the social network between the learners. Connections mean that a learner has linked or commented another learner. Course feed and progress pages are presented in Figure 10.

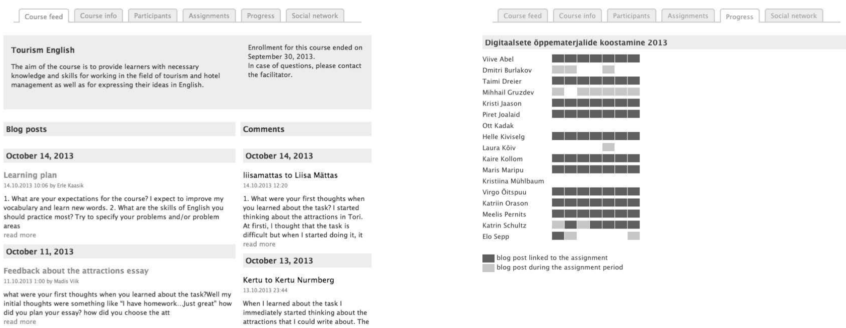

Figure 10. Course feed page (left) and progress page (right) of EduFeedr

EduFeedr has been used in more that 80 courses. Most of the courses have been organized in Estonia, but there are courses also from Spain, Portugal and Finland. Most of the courses are formal higher education courses that are open for external participants. The largest courses have had more than 60 participants, but the average number of participants is 20. All together, EduFeedr has been used by a total of more than 1,700 learners.

[26] https://wordpress.com

[27] https://www.blogger.com

5.4 LeContract

The fourth online learning tool discussed in this study is also designed in the context of open online courses. It is different from other design cases since it remained at the level of contextual design and the actual software prototype was not developed. The tool named LeContract was designed to support the use of the learning contract method in blog-based open online courses. Learners develop learning contracts to specify their personal learning goals, resources they are planning to use, strategy to achieve their goals, and expected outcomes to evaluate their learning. Learning contracts can be revised several times during the study project, based on the guidance from the facilitator and learners' deepened understanding of their learning. At the end of the study project, the leaning contract can be used for writing a personal reflection of the learning process. So far, the author has used blogs for writing learning contracts. However, with blog posts it is not complicated to store different versions of the learning contract and give feedback on the specific parts of the learning contract.

LeContract was designed as an online social networking tool, which enables learners to write *learning contracts* and connect to learners with similar goals. In order to scaffold the process of writing learning contracts, the tool would provide a template for learners. The structure of the default learning contract template is presented in Table 4. Each section in the learning contract has guiding questions that assist the learner in writing their learning contract.

Table 4. Structure of the default learning contract template

Section	Guiding questions
Topic	What is the topic I wish to learn about?
Purpose	What is the purpose of my task? Why do I wish to learn about or learn to do a particular task?
Resources	What kind of technological, material and human resources do I need? How can I get access to these?
Strategy	How do I intend to go about learning this particular topic/task? What action may be involved and in what order will these be carried out?
Outcome evaluation	How will I know when I have completed the task/topic successfully? How shall I judge success?
Reflection	How well did I do? What has worked? What has not worked? Why? What remains to be learnt? What are my strengths and what are my weaknesses? What shall I do next?
Tags	What do I want to learn? My main learning objectives as tags, separated by commas.

LeContract would allow learners to create different versions of the learning contract, thus making it possible to see how learners' goals and strategies have been refined during the study project. Comments given by the facilitator or other learners are attached to the specific version of the learning contract. It is possible to group learning contracts from the same study project by adding them to the *courses*. There are no different user roles for learners and facilitators and any LeContract user could create a course. Furthermore, LeContract would allow the creation of additional *learning contract templates* for specific purposes. The main concepts of the system are presented in Figure 11.

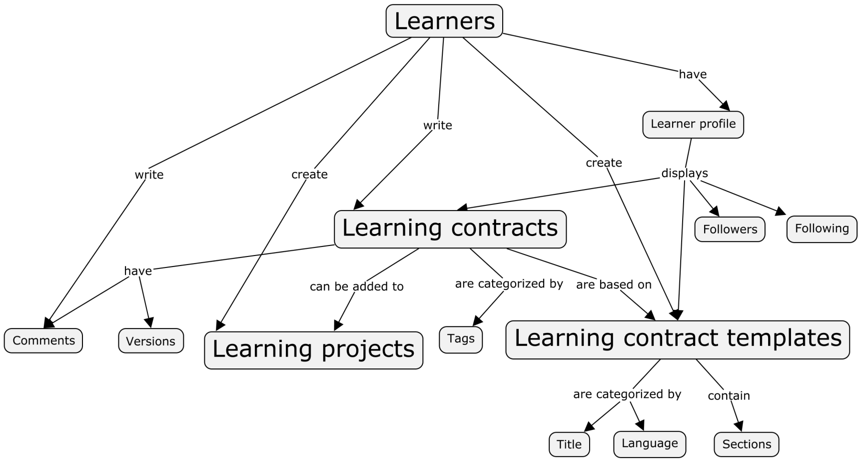

Figure 11. Main concepts of LeContract

The social features of LeContract were designed to include *learner profiles* that show all learning contracts written by the learner and a possibility to follow other learners. Learning contracts are described with tags that make it possible to connect learners with similar learning goals. It was also planned to have a compact view of the learning contract that could be embedded to learners' blog.

The conceptual design of LeContract is documented through various design artifacts. Four personas describe the intended users of the system and their goals. Five scenarios focus on typical use situations such as first experience with LeContract, writing a learning contract, reviewing the learning contracts, creating a new template, and browsing the learning contracts. A more detailed description of the system is in a form of user stories and paper prototypes. The design process of LeContract was carried out in 2010. In recent years there have been several new developments that could influence the design of LeContract. It would be interesting to connect planning one's personal learning with open badges that could be earned for learning activities. Having a large set of learning contracts together with revisions, comments and learners' reflections also opens up various possibilities for learning analytics.

5.5 DigiMina

Blog-based open online courses with teachers revealed that there are important differences in teachers' level of digital competencies. This directed the research towards assessment and recognition of competencies. In 2011 and 2012, the DigiMina tool was designed and developed for web-based assessment of teachers' educational technology competencies. Typically, competencies are assessed using automated computer-based assessment. DigiMina took a different approach by exploring how the assessment process could be made more open by involving teachers through self- and peer-assessment.

The central feature of DigiMina system is a competency test that the users can take. The structure of the competency test depends on the competency model that is used. The educational technology competency model for Estonian teachers was based on ISTE NETS-T framework (ISTE, 2008). This competency model consists of 20 competencies that are divided into 5 groups. Each competency is assessed on a 5-level scale, meaning that there are five assessment tasks for each competency. When taking the competency test, users can estimate their existing competency level and start with an assessment task on that level. Depending on the result, they will be directed to another assessment task on a higher or lower level.

DigiMina supports three types of assessment tasks: (1) automatically assessed self-test items, (2) peer-assessment tasks, and (3) self-reflection tasks. Contextual inquiry indicated that only part of the educational technology competencies could be assessed with automated assessment tasks. Therefore, part of the competencies is assessed through self- and peer-assessment. In case of self-reflection tasks, the users will choose a description of competency level that most appropriately describes their current knowledge and skills. Other DigiMina users who have already completed that specific competency level carry out peer-assessment tasks. Tasks must be created using an external authoring tool that supports IMS Question & Test Interoperability[28] specification.

After completing the competency test for at least one group of competencies, a competency profile will be generated for the user (see Figure 12). Teachers can make their competency profile public and link it to their personal website, social networking profiles or e-portfolio. It is also possible to create groups for teachers from the same school, area or subject. Teachers who are not ready to share their competency profile in public can make it accessible only for members of the same group. Main concepts of the DigiMina system are presented in Figure 13. Although DigiMina was designed in the context of educational technology competencies for Estonian teachers, it could be used also in other settings that have a competency model and a set of assessment tasks.

[28] https://www.imsglobal.org/question/

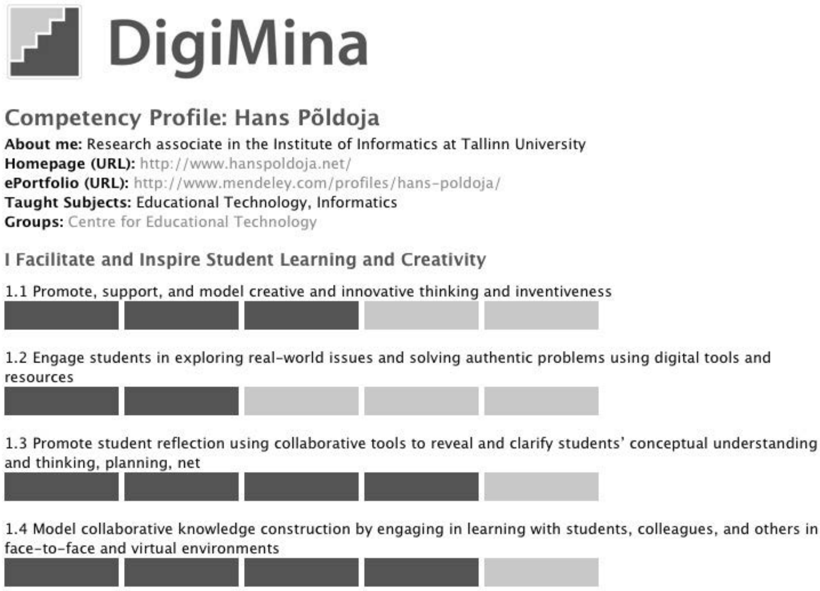

Figure 12. Competency profile page in DigiMina

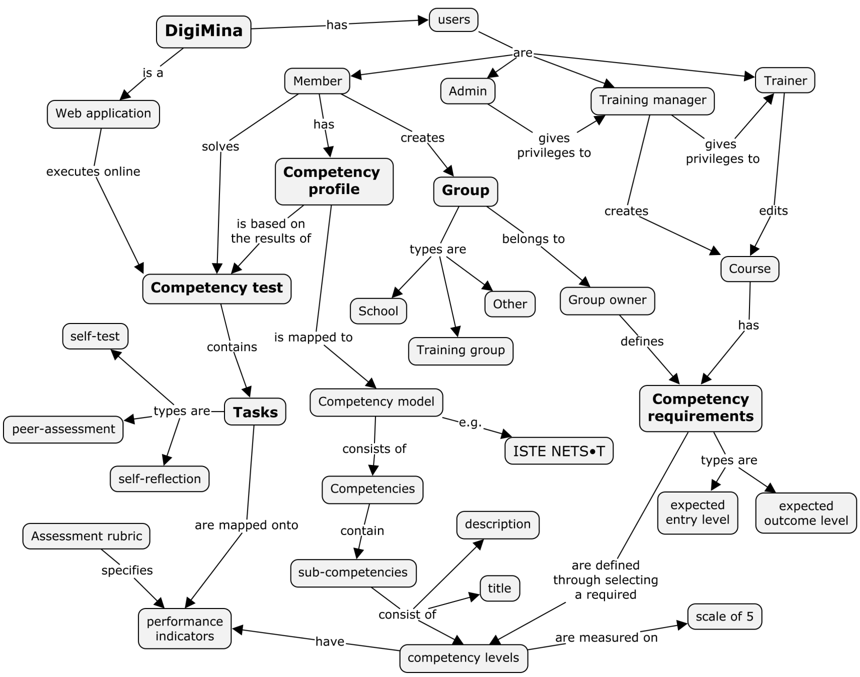

Figure 13. Main concepts of DigiMina

The prototype of DigiMina system was evaluated by a group of 50 teachers. For the evaluation purposes, assessment tasks were prepared for one group of competencies. In general, the teachers who participated the evaluation study were satisfied both with the approach of combining self- and peer-assessment to assessing the educational competencies and with the implementation of the prototype. However, the majority of respondents also believed that teachers would need extrinsic motivation to use such a service (Põldoja, Väljataga, Laanpere, & Tammets, 2014). For a wider adoption at the national level, assessment of educational technology competencies should be integrated into teacher training programs.

6. Results

The tools presented in the previous chapter are practical results of this study. This chapter presents the theoretical outcomes of the study that have been generalized from the design cases. These results respond to the three research questions formulated in Section 1.5. With this study, my aim was to define the main design challenges related to the open education ecosystem (Q1) and to identify and recommend design patterns for addressing these challenges (Q2). Furthermore, I have tried to recognize what kind of structure and components are needed for creating the open education ecosystem (Q3). This chapter is divided into three subchapters that address each of the research questions.

6.1 Design Challenges for the Open Education Ecosystem

The main design challenges related to the open education ecosystem are presented and discussed in three different contexts: open educational resources, blog-based open online courses, and assessment and recognition of competencies. The design challenges are categorized into three groups: pedagogical, socio-cultural, and technical design challenges. It is important to note that design challenges are always dependent on the context within which the design and its results are intended to have an impact. It is not possible to provide a complete and detailed list of design challenges related to the open education ecosystem. The length of such a list would be infinite. Therefore, this dissertation discusses the design challenges that were revealed during this study where the focus has been on open education resources, blog-based open online courses, and assessment and recognition of competencies. These challenges are explained more in depth in the research publications included in this dissertation. In addition to summarizing these, this chapter presents also some additional design challenges that were revealed and generalized in the later phases of the study and thus are not included in the publications. A total of twenty-two (22) design challenges are reported in this dissertation.

6.1.1 Challenges for Open Educational Resources

The context of open educational resources was studied through two online learning tools and services that were designed between 2004 and 2010 — the PILOT learning resource template and the LeMill online community. The main context for both projects was school education in European countries. The design challenges were identified through participatory design sessions with teachers, researchers' observations and literature review. Pedagogical design challenges are related to supporting the use of new pedagogical methods and assuring the quality of open educational resources. Socio-cultural design challenges are related to an assumption that the European teachers do not share their learning resources and do not improve them in a collaborative way. Technical design challenges identified in this study were related to the limitations of existing learning object repositories and challenges related to localization and reuse of learning resources. While a number of new the tools developed in the last decade have addressed many of the technical challenges, it may be argued that the pedagogical and socio-cultural challenges identified in this research remain unchanged.

Pedagogical design challenges

Challenge 1: Digital learning resources are mainly used for individual learning and for presentations
In many cases digital learning resources are used by students for individual learning (reading, looking, playing, quizzes) or by teachers in their classes (presentations). It is a challenge to design OER tools and services that guide teachers away from the acquisition of knowledge paradigm to the participation and knowledge creation paradigms (Paavola et al., 2004).

Challenge 2: Scaffolding the use of new pedagogical methods
Adopting new pedagogical methods might also require new skills from teachers and learners. One specific pedagogical method related to the PILOT project was the progressive inquiry model (Muukkonen et al., 2004). As this model is not well known among the teachers, it was a challenge to design the PILOTs so that they provide pedagogical scaffolding for teachers and learners who are not acquainted with the progressive inquiry.

Challenge 3: Assuring the quality of collaboratively created open educational resources
Collaborative authoring of open educational resources raises issues related to assuring the quality of learning resources. In LeMill, any user may publish a learning resource or edit an existing resource. It requires a critical mass of active users in a certain language and subject area to keep an eye on the quality of learning resources and make necessary changes. One specific area of quality that presents problems is the area of copyright issues related to the use of third party content such as images.

Socio-cultural design challenges

Challenge 4: Lack of collaboration and peer production of learning materials
European teachers are not used to sharing their learning resources with other teachers. Often teachers think that their resources are not good enough for sharing in public. Also, teachers are worried about copyright issues. Some teachers would need external motivation to share their resources. Publishing a

learning resource in the repository is an extra step that is often missed because of lack of time. There is always a threshold for joining an online community and starting to collaborate with other people. Most of the learning object repositories are designed for searching and publishing resources, not for collaboration.

Challenge 5: Lack of reuse, revising and remixing
It is not clear how much the resources from existing learning object repositories are actually reused by the teachers. Teachers who reuse and adapt existing learning resources often do not share their revised versions again with the teacher community. Reusing, revising and remixing of resources are related to copyright. Depending on the license, certain actions may not be permitted or certain resources may not be remixed with each other.

Challenge 6: Multilingualism
In the European Union, there are 24 official languages and a number of semi-official and minority languages. This makes multilingualism a challenge for sharing learning resources throughout Europe. The design of a multilingual learning resource sharing platform should empower smaller language communities within one repository. Providing translation tools may encourage transferring good resources between the languages. Multilingualism also raises challenges related to metadata, because resources may combine multiple languages. It is also important to identify resources that could be reused in different languages without a need for translation (images, simulations, etc.).

Technical design challenges

Challenge 7: Providing localization and reusability while retaining authentic context
Localizing learning resources does not mean simply translating the content from one language to another. It is important that the learning resources provide authentic context for the target group. In the PILOT project, it was a challenge to design a template structure that would allow flexibility in localization, so that the teacher could decide which textual content and media elements should be edited or replaced in the localization process. From the technical perspective, localization is also related to versioning of learning resources.

Challenge 8: Limited findability and poor usability
In the beginning of the LeMill project, limited findability of resources and poor usability of learning resource tools were common issues. Two main options for finding learning resources are using search forms and browsing resources by metadata. Using only search forms limits access to the resources because users can discover only results for their search queries. It is a challenge to design meaningful browsing and recommendation structures based on metadata. Poor usability was an especially critical issue with authoring interfaces. Most of the authoring tools did not emphasize collaboration and social aspects.

Challenge 9: Poor use of the underlying principles of the Web
In mid 2000s, many learning object repositories did not use the underlying principles of the Web, such as openness and "linkedness" to the full extent. In the context of learning object repositories, openness has a wider meaning than open educational resources published under open licenses. Anyone should have the possibility of joining the system, creating new learning resources, and improving existing learning resources. Any resource, collection, and other important view in the system should have a unique and permanent link that can be openly linked to.

6.1.2 Challenges for Blog-based Open Online Courses

Pedagogical design challenges

Challenge 10: Supporting learners with setting up their personal learning goals and strategies
Personal learning contracts allow learners to describe their personal learning objectives, plan the resources and strategies needed to achieve their goals, and set up the evaluation criteria. While the use of personal learning contracts is associated with improving learner motivation (Chyung, 2007), setting up a personal learning contract requires certain scaffolding. Learners would benefit from having a clear structure for the learning contract and access to good examples from other learners.

Challenge 11: Keeping the learner motivation throughout the course
Keeping learners motivated throughout the course is a common challenge in open online courses. Typically, only a part of the learners who sign up for the course actually start participating in the course activities. Open online courses have also a relatively high rate of learners that drop out during the course. This phenomenon has been described as the "funnel of participation" (Clow, 2013). Reinforcing learner motivation is especially complicated when there are little or no face-to-face meetings.

Challenge 12: The danger of over-scripting
The format of blog-based open online courses is more learner-centered than typical online courses, therefore it is critical to find balance between predefining the course activities and leaving control to the learners. Too rigid structuring of course activities is known as over-scripting. Over-scripting may disturb natural interactions and problem solving processes, increase learners' cognitive load, emphasize teacher-controlled learning processes, and impede learners from setting up and achieving their personal learning goals (Dillenbourg, 2002).

Socio-cultural design challenges

Challenge 13: Establishing and keeping the community gravity
The main socio-cultural design challenge related to blog-based open online courses is creating and sustaining the community gravity (Väljataga et al.,

2011). The concept of community gravity was first introduced in the context of social networking sites, where it is used to measure how strongly a user is attracted to a community (Matsuo & Yamamoto, 2009). As with pedagogical challenges, community gravity can be increased both by the design of learning tools and by instructional design.

Technical design challenges

Challenge 14: The fragmentation of discussions in blog-based courses
The structure of conversations in blog-based learning environments is different to that of the typical learning management systems that have a single central discussion area. In blog-based courses, the conversation is fragmented between different blogs. Responses to interesting blog posts may be posted as comments to the original post or as new posts in another blog. It is common that participants visit certain blogs more often than others. Thus, some blog posts and discussions may remain unnoticed. Therefore, there is a need for central aggregation tools that would combine fragmented discussions.

Challenge 15: Lack of coordination structures for managing blog-based courses
Blog-based learning environments lack certain coordination structures that are common in learning management systems. These features include enrollment to the courses, management of assignments, overview of learners' activity, and grading. Lack of these coordination tools increases the facilitator's workload in managing course activities.

Challenge 16: Lack of awareness support mechanisms
Coordination is related to awareness support mechanisms that are typically implemented as notification systems or visualizations. In the context of blog-based courses, there could be notifications of new participants, assignments, blog posts, comments, and trackback links. Various visualizations could increase learners' awareness about their progress in the course and provide comparison with other learners. Awareness mechanisms are also important for facilitators in order to have an overview of the learning process and identify learners who need additional support.

Challenge 17: Commenting and versioning of learning contracts
Currently, the learning contract method is used so that learners publish their learning contract as a blog post in a personal blog. This limits how learning contracts could be elaborated during the course and how others could give feedback to the learning contract. When learners edit their existing learning contract, only the latest saved version of the blog post would be visible. It should be possible to create new versions of learning contracts so that what has been changed and which sections of the learning contract have been edited is clearly visible. Regarding commenting, it would be beneficial to have the ability to add comments to specific sections of the learning contract.

6.1.3 Challenges for Assessment and Recognition of Competencies

The third context examined in this study is assessment and recognition of competencies. During the last decade there have been a number of socio-technical developments that provide new opportunities for enhancing learning, but also require new kinds of digital competencies from the teachers. Competency frameworks such as ISTE NETS-T address these new requirements for teachers' digital competencies but do not provide standardized assessment instruments. Authentic assessment is also related to a specific context. This study was carried out with Estonian teachers. The main design challenges identified in the study are related to defining the performance indicators and test items, opening up the assessment process, and finding a balance between authentic assessment and limitations of computer-based assessment tools.

Pedagogical design challenges

Challenge 18: Defining measurable performance indicators of all the competencies
ISTE NETS-T competency model consists of 5 core competencies which each include 4 detailed sub-competencies. For assessing the level of competencies, there is a need for more detailed performance indicators for each sub-competency. Miller (1990) has proposed four levels for competency assessment: (1) knows, (2) knows how, (3) shows how, and (4) does. With computer-based assessment it is difficult to assess higher level competencies (shows how, does). Therefore, a competency model should include performance indicators on the "knows how" level on assessing applied knowledge for solving problems and making decisions in specific contexts. In the context of the educational technology competency model for Estonian teachers, it was decided to assess each competency on a five-level scale. The resulting assessment rubrics should contain 100 performance indicators (20 sub-competencies, each assessed on 5 levels).

Challenge 19: Defining test items for each performance indicator
For each performance indicator, there must be one or more test items that are presented for the teacher who is assessing his/her educational technology competencies. Depending on the performance indicator, these can either be automatically assessed self-test items, peer-assessment tasks, or self-reflection tasks. For making the assessment process faster, self-test items should be preferred whenever possible. Test items should present real-life problems, be clearly understandable for the teachers, have a reasonable level of complexity, and be situated in an authentic context.

Socio-cultural design challenges

Challenge 20: Encouraging peer-assessment
The possibilities of automated computer-based assessment are limited to certain types of tasks. Assessing higher-level competencies would require human feedback. It is a challenge to design a system that would motivate people to

give feedback to their peers. Related to this, it is important to guarantee the quality of peer-assessment by requiring a certain level of competency from the reviewers and involving multiple reviewers for each peer-assessment tasks.

Challenge 21: Making the competency data open
The level of ones' skills and competencies is traditionally considered sensitive information that is kept private. Sharing competency profiles inside a small group (e.g. teachers from the same school) could open up possibilities for peer learning. Expert teachers could make their competency profiles open for a wider audience. Having open but anonymous competency data at the national level would provide various opportunities for making policy level decisions, planning teacher trainings, and performing learning analytics. It is a challenge to design a system in which people could see the benefit of sharing their competency information.

Technical design challenges

Challenge 22: Combining authentic assessment with limitations of online assessment tools
Authentic assessment tasks should be implemented within the limitations of online assessment tools. Gulikers et al. (2004) have proposed five aspects for enhancing the authenticity of assessment: assessment tasks, physical context, social context, form of assessment, and assessment criteria. The design of assessment tasks and assessment criteria is directly dependent on the limitations of the assessment tool. Online assessment tools could accentuate the social context by providing some collaborative features. The form of assessment could be made more authentic by including videos and simulations. The authenticity of the physical context cannot be influenced directly by the design of assessment tools.

6.1.4 Summarizing the Design Challenges

This section described 22 design challenges that were identified in five design projects. Due to the focus of the projects, the design challenges were grouped under three different contexts: collaborative authoring of OER's, blog-based open online courses, and assessment and recognition of competencies. Furthermore, the design challenges were classified as pedagogical, socio-cultural, or technical. The next section provides an overview of how these design challenges have been addressed. In the following text, design challenges are referred to with numbers C1–C22.

6.2 Design Patterns for the Open Education Ecosystem

Solutions to the design challenges discussed earlier are presented in a form of design patterns. It was decided to identify design patterns separately in two contexts — collaborative authoring of open educational resources and blog-based open online courses. In both contexts, two of the designed tools (LeMill and EduFeedr) were used for several years with a large number of people. This allowed observation of how the design solutions work in real life and the process of making necessary changes to the design. Real life use also highlighted how the designed tools are related to other tools and services that are used in the same contexts. This allowed the identification of design patterns that position design solutions developed in this study into a larger open education ecosystem. It may be considered that the third context — assessment and recognition of open competencies — is still emerging. Solutions such as open badges are not yet widely used in education. Therefore, it was decided not to propose a connected set of patterns for this context.

6.2.1 Collaborative Authoring of Open Educational Resources

A set of 12 design patterns is identified for collaborative authoring of OER's. Figure 14 presents a pattern network that shows connections between the patterns. Alexander (1979, p. 314) gave inspiration to this visualization of patterns.

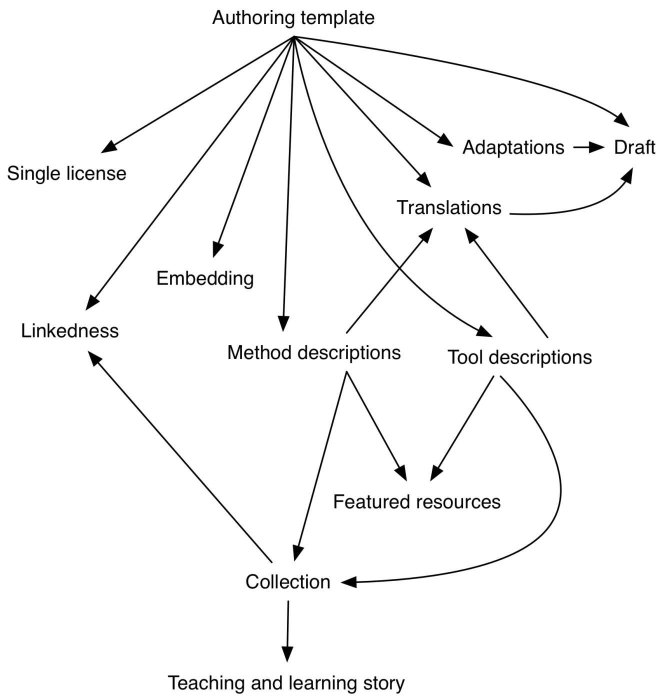

Figure 14. Pattern network for collaborative authoring of OER's

A central pattern in this network is the AUTHORING TEMPLATE (1). Other larger patterns that contain other patterns are METHOD DESCRIPTIONS (8), TOOL DESCRIPTIONS (9), COLLECTION (10), and TRANSLATIONS (6). There are certain similarities between the main concepts of the LeMill system (see Figure 9) and the identified design patterns. However, some of the main concepts of LeMill were too generic for developing into design patterns (e.g.

learning resource). Also it was decided to focus only on these design patterns that are specific for collaborative authoring of OER's. This study does not discuss social software design patterns that are common for various online platforms (user profile, dashboard, groups, tagging, etc.).

In pattern descriptions, I follow the format used by Alexander et al. (1977). Each pattern starts with a short description of the context that specifies larger patterns connected to this pattern. This is followed by a discussion of conflicting forces and description of the recommended configuration. Finally, other connected patterns are referred to. As this study has identified design challenges, each pattern also refers to the addressed design challenges.

Design Patterns

Pattern 1: Authoring template
This pattern deals with providing a clear structure for creating new learning resources.

It may be difficult to start creating a new learning resource from the scratch. Having a certain predefined structure for new learning resources would help teachers to get started. A large collection of peer produced learning resources would benefit from having a consistent structure and layout. Consistent structure contributes to the quality of learning resources. On the other hand, it is important to achieve balance between predefined structure and flexibility for the authors.

Therefore: The learning resource authoring tool should provide a set of pedagogical templates that scaffold teachers and content producers in creating new resources. LeMill provided six pedagogical templates for creating learning resources: web page, presentation, exercise, lesson plan, school project, and PILOT. Web page is a generic template while other templates provide a more predefined structure. Authoring templates consist of different types of sections that are called blocks in LeMill. For example, web pages in LeMill consist of text blocks, media pieces and embed blocks. The exercise template has additional blocks for various question types. Templates may also scaffold the use of new pedagogical methods, such as the PILOT template in LeMill.

This is a central design pattern, that is related to a number of smaller design patterns. Learning resources based on authoring templates have a DRAFT (2) status, support EMBEDDING (3) and LINKEDNESS (4), are published under a SINGLE LICENSE (5), and could be developed into TRANSLATIONS (6) or ADAPTATIONS (7). Two special types of authoring templates are METHOD DESCRIPTIONS (8) and TOOL DESCRIPTIONS (9). As a central design pattern, authoring template is addressing a number of design challenges: (C3) assuring the quality of collaboratively created open educational resources; (C4) lack of collaboration and peer production of learning materials, (C5) lack of reuse, revising and remixing, and (C2) scaffolding the use of new pedagogical methods.

Pattern 2: Draft

This pattern deals with distinguishing resources that are under development from resources that are completed. Draft status is an attribute of certain AUTHORING TEMPLATES (1).

When a learning resource is developed using an open online platform, each saved version of the resources is accessible. It means that anybody may find resources that are under development. On one hand it is good, since people will see which new resources are currently under development. On the other hand, finding incomplete resources might be confusing. Therefore it is important to make a clear distinction between resources that have been completed and resources that are under development. Also, some authors are not comfortable with showing their incomplete works.

Therefore: Incomplete resources should be clearly distinguished from complete resources. In LeMill, this separation is implemented as a draft status. All draft resources have a default cover image that shows the type of the resources (web page, exercise, lesson plan, etc.). Draft resources can be either public or private. Author names are not displayed on the resource page when the resource is in draft status. However, the information about authors can be accessed from the editing history. When the resource is ready for publishing, the first author can publish the resource. During the publishing process the author must choose or add a cover image for the resource. Published resources can be easily distinguished from draft resources by having a cover image. Also, author names are displayed with published resources. In search results, draft resources are displayed only after published resources.

Draft status is addressing two design challenges: (C3) assuring the quality of collaboratively created open educational resources and (C4) lack of collaboration and peer production of learning materials.

Pattern 3: Embedding

This pattern deals with using external media content in learning resources. Embedding supported in some AUTHORING TEMPLATES (1).

It is often not feasible for a learning resource authoring tool to provide a large feature set and to support a wide variety of content types. It is common that web sites focus on a specific type of content, e.g. YouTube focuses on movies and SlideShare on presentations. In many cases these web sites provide an embedding code that allows the reuse of their content on other web pages. From the authors' perspective, there is a need to use a media content to enrich their learning resources. In case the content is under copyright, they cannot copy the actual content to their resource, but can use an embedded player that plays the content from the original location.

Therefore: Limitations of the authoring tool can be addressed by enabling users to embed external content from other online systems that provide an embedding code. Examples of content that could be embedded include movie clips, audio clips, presentations, maps, mind maps, interactive timelines, quizzes, simulations, simple educational games and other types of resources. Good examples of authoring tools that rely on embedding are blogging platforms

WordPress and Blogger. LeMill allows embedding of external resources on the *web page* and *exercise* templates.

Embedding is addressing two design challenges: (C5) lack of reuse, revising and remixing, and (C9) poor use of the underlying principles of the Web.

Pattern 4: Linkedness

This pattern deals with making hypermedia connections between the resources. Linkedness is supported by AUTHORING TEMPLATES (1) and COLLECTIONS (10).

Many learning resources in traditional learning object repositories have to be downloaded for viewing and using (text documents, presentations, etc.). Also, some repositories restrict access to resources only to logged in members. LeMill took a different approach and limited its focus on web-based learning resources that are openly accessible and can be viewed and edited using a standard web browser. One of the main benefits of web-based resources is that they can be linked with each other. Search engines follow links between the resources and highly linked resources are more visible in search results.

Therefore: Learning resource authoring platform should focus on web-based learning resources that are highly interlinked. Resources should be openly accessible to anybody and have a permanent location that can be linked to from any other web page. The design of the platform and community guidelines should encourage internal linking between the resources, so that there are no dead-end resources. Some of the interlinking can be achieved automatically. For example, authors' name should link to a profile page, metadata fields such as a subject area should link to a browsing page showing other resources from that subject, etc. The authors should create other internal links such as links to related resources manually.

This pattern addresses the limited findability (C4) and poor use of the underlying principles of the Web (C9).

Pattern 5: Single license

This pattern deals with legal issues related to combining learning resources with each other. License is attached to all resources based on AUTHORING TEMPLATES (1).

There are six different Creative Commons licenses and a number of other open content licenses that could be used for open educational resources. It is important to understand that when creating adaptations, not all works under Creative Commons licenses could be combined with each other. The most liberal license is Creative Commons Attribution license. Works under this license may be combined with works under any other Creative Commons license when creating adaptations. Works under Attribution and Attribution-ShareAlike licenses are considered Free Cultural Works. Licenses that have Non-Commercial or NoDerivatives restriction are considered non-free licenses. If users are free to choose any of the six licenses for their works, it will result in separate pools of content that cannot be combined with each other when creating adaptations.

Therefore: Use a single license for all works created on the same authoring platform. This allows users to combine different works into adaptations. The choice of license is dependent on the requirements, but licenses acknowledged as Free Cultural Works are preferred. LeMill uses Creative Commons Attribution-ShareAlike license for all learning resources created inside LeMill. The same license is also used in Wikipedia.

This pattern addresses the lack of reuse, revising and remixing (C5).

Pattern 6: Translations

This pattern deals with translating learning resources based on AUTHORING TEMPLATES (1) from one language to another.

In the European context, multilingualism is an important design consideration. Learning resource sharing platforms should be designed so that they support transfer of resources between different language communities. This process should not be seen as a mere translation of resources, but localization and adaption to another socio-cultural context. It is possible to allow a single translation in each language or multiple translations that supplement each other. In order to keep the focus of the community, it was decided to allow a single translation into each language in LeMill. One of the issues that became evident with translations was a large number of incomplete translations. Often people started the translation process without completing the translation.

Therefore: Learning resource authoring tool should provide the ability to translate existing learning resources into another language. When starting a new translation, users should be able to specify the language of the translation. Original text should be displayed next to the translation form. If a resource is divided into separate sections, it should be possible to translate each section separately. Partial translations should be initially saved in DRAFT (2) mode to distinguish them from completed translations. Translated versions should be linked to the original resources.

Translations are related to the DRAFT (2) pattern and address two design challenges: (C6) multilingualism and (C7) providing localization and reusability while retaining authentic context.

Pattern 7: Adaptations

This pattern deals with adapting learning resources based on AUTHORING TEMPLATES (1) to a specific target group and learning context.

Adaptation of learning resources is related to the five 'R's of openness (Wiley, 2014) discussed earlier in Section 2.2.2. These involve revising and remixing of resources. Teachers should be able to revise learning resources according to their learners' needs and specific context. Also, it should be possible to combine several resources through remixing. Providing a flexible way for making adaptations is a challenging task. Wiki-based online collaboration platforms such as Wikipedia allow members to edit and improve a single instance of the resource. Learning resources are different from encyclopedia articles — there could be several alternative learning resources in the same topic. A challenge with adaptations is that people would too easily create revised versions that have very little differences with the original resource. On the other hand, it is also possible, that the adaptations could become improved or significantly different from the original version.

Therefore: Learning resource authoring platform should provide the ability to create adaptations (revised or remixed versions of the original resource). New adaptations are initially in DRAFT (2) status. Adaptations should be linked to the original resource. Original versions and significantly improved adaptations should be displayed in a more prominent position than adaptations with minor changes. In LeMill, users editing the resource are required to identify whether they performed a major or minor edit.

Adaptations are related to the DRAFT (2) pattern and the design challenge regarding the lack of reuse, revising and remixing (C5).

Pattern 8: Method descriptions

This patterns deals with sharing descriptions of pedagogical methods using a simple AUTHORING TEMPLATE (1).

Teachers are not only looking for resources that could be used with students, but also for good ideas regarding innovative learning activities, educational practices and other pedagogical methods. Methods should be seen as generic descriptions of activities that could be reused in different contexts.

Therefore: The learning resource authoring platform should provide tools for describing and sharing descriptions of pedagogical methods. To emphasize the importance of methods, LeMill included a separate section for method descriptions. Adding method descriptions was made a straightforward process by having a simple template for the textual description of the method. Similar to learning resources, it was possible to create TRANSLATIONS (6) of method descriptions.

Method descriptions are related to a number of smaller patterns. They can be developed into TRANSLATIONS (6), added into COLLECTIONS (10), and displayed under FEATURED RESOURCES (12). This pattern addresses two design challenges: (C1) digital learning resources are mainly used for individual learning and for presentations and (C2) scaffolding the use of new pedagogical methods.

Pattern 9: Tool descriptions

This pattern deals with a simple AUTHORING TEMPLATE (1) for sharing descriptions of tools that could be used for teaching and learning.

Teachers use various digital and non-digital tools in their lessons, for creating learning resources and for communicating with other teachers, students and parents. Learning resource platform would benefit from sharing descriptions of these tools.

Therefore: The learning resource authoring platform should enable the sharing of descriptions of educational tools. Tools could be seen as a third important component in addition to learning resources and methods, therefore LeMill had a separate section for tool descriptions. Similar to methods, tool descriptions were based on a simple template that had a textual description and location of the tool. Also, it was possible to translate tool descriptions to other languages.

Tool descriptions can be developed into TRANSLATIONS (6), added into COLLECTIONS (10), and displayed under FEATURED RESOURCES (12). This pattern addresses the challenge that digital learning resources are mainly used for individual learning and for presentations (C1).

Pattern 10: Collection

This pattern deals with presenting related resources in context. Collections may contain learning resources, METHOD DESCRIPTIONS (8) and TOOL DESCRIPTIONS (9).

There is a need for a simple way to combine and present related resources in context. In the simplest case, teachers could group together learning resources, tools and methods used in one lesson or one study project. Collections could be also used for presenting resources dealing with the same topic as well as resources created in the same teacher training or otherwise related resources. Collections could enhance the findability of resources and highlight high quality content.

Therefore: The learning resource platform should enable users to create collections. Users should be able to add to collections both their own resources and resources created by others. It should be possible to rearrange the order of resources added to a collection. In LeMill, the content, method descriptions and tool descriptions are grouped together in a collection. It is also possible to add other collections into a single collection. This is useful for creating a course collection and separate collections for each lesson. All collections are public.

Collections support LINKEDNESS (4) of resources and can be described with a TEACHING AND LEARNING STORY (11). This pattern addresses the following design challenges: (C2) scaffolding the use of new pedagogical methods, (C5) lack of reuse, revising and remixing, and (C8) limited findability and poor usability.

Pattern 11: Teaching and learning story

This pattern deals with sharing experiences from using a COLLECTION (10) of resources in the learning process.

In order to share best practices from using learning resources, teachers and learners should be able to document their experiences. One approach is to add comments to specific resources. Although LeMill had a commenting page for each resource, this feature was not widely used. Another approach is to add reflection to a collection of related resources. This would provide a more contextual way of sharing experiences.

Therefore: The learning resource platform should enable users to reflect on their experience from using learning resources. In LeMill, it was decided to connect these reflections to collections. The author of the collection can write a “teaching and learning story” that describes her experiences from using a collection of related content, method and tools in the actual learning setting. It is possible to have only one teaching and learning story for each collection. The story could be edited over time, if the teacher has additional tips to share. Collections with teaching and learning stories should be presented so that users will easily notice them.

This pattern addresses two design challenges: (C1) digital learning resources are used mainly for individual learning and for presentations and (C2) scaffolding the use of new pedagogical methods.

Pattern 12: Featured resources

This pattern deals with highlighting good learning resources, METHOD DESCRIPTIONS (8) and TOOL DESCRIPTIONS (9).

Making good resources easily findable is a challenge for learning resource sharing platforms that have a large number of resources. To address this challenge, one approach is to display featured resources that are recommended for users. These recommendations could be either manually selected by the editors of the platform or automatically selected based on learning analytics (number of times the resource has been marked as a favorite, added to collection, translated to another language, etc.). In LeMill, learning analytics was preferred since the managers of the portal only understood some of the languages used. Depending on the amount of high quality resources, it should be decided how personalized the featured content is. For example, it is possible to personalize the displayed items based on users' language, subject areas or location.

Therefore: The learning resource platform should highlight high quality resources. In LeMill, this is implemented as featured resources. The front page of LeMill always displays a collection that has a teaching and learning story. Front pages of the content, methods and tools section display three featured content items, method descriptions or tool descriptions. The front page of the community section highlights three active members of LeMill. The language of the displayed resources is dependent on the user interface language that is used for browsing LeMill.

This pattern addresses three design challenges: (C8) limited findability and poor usability, (C5) lack of reuse, revising and remixing, and (C3) assuring the quality of collaboratively created open educational resources.

Summary

All of the previously described design patterns were identified by studying the implementation of the LeMill tool. The only pattern that eventually became problematic in actual use was ADAPTATIONS (7). It was implemented in a way that allowed authors to lock their resource so that other people were only able to edit copies of the resource. This resulted in a number of very similar copies. Therefore it was decided to remove this feature from LeMill. However, creating adapted versions is an important feature that should be carefully considered for the learning resource authoring platform.

These 12 patterns addressed all of the design challenges related to collaborative authoring of OER's. The mapping of design challenges and design patterns is presented in Figure 15.

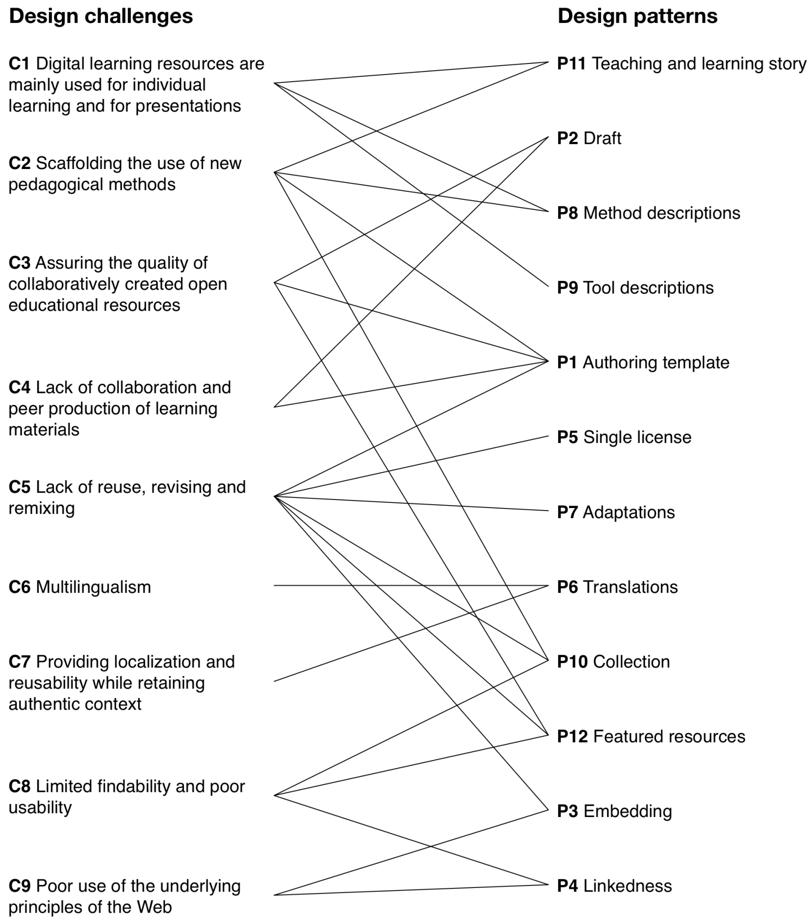

Figure 15. Mapping of design challenges and patterns for collaborative authoring of OER's

As can be seen from Figure 15, certain design challenges have been addressed more thoroughly than others in this study. These central design challenges include (C5) lack of reuse, revising and remixing, and (C2) scaffolding the use of new pedagogical methods. Most of the design challenges are related to two or three patterns, while two design challenges are only addressed by the TRANSLATIONS (6) pattern.

These patterns can also be discussed from the digital ecosystems perspective. Open educational resources can be seen as a niche in the open education ecosystem. In natural ecosystems, populations form niches in the microhabitats in which they live. The OER niche consists of learning utilities (OER tools and OER's) and learning stakeholders. In a more narrow perspective, it is also possible to refer to the OER ecosystem as a stand-alone digital ecosystem. However, OER tools are connected to other parts of the open education ecosystem and the same learning stakeholders could also be active in other niches of the open education ecosystem.

As discussed earlier in Section 2.3.1, the essential characteristics of digital ecosystems are interaction and engagement, balance, clustered and loosely coupled relationships, and self-organization between the species (Chang & West, 2006). These characteristics are all present in the patterns presented in this chapter. AUTHORING TEMPLATES (1) frame the interaction possibilities between the learning stakeholders who create OER's. Interaction with other OER tools and online platforms is achieved through EMBEDDING (3) and LINKEDNESS (4). Patterns that contribute to achieving balance include DRAFT (2) status for incomplete resources and a SINGLE LICENSE (5) that enables remixing of content within one authoring platform and between other online communities using the same license. Loosely coupled open educational resources can be connected through COLLECTIONS (10) and LINKEDNESS (4). OER authoring platforms also needs a certain level of self-organization. For example, FEATURED RESOURCES (12) are based on learning analytics data and users organize the resources into COLLECTIONS (10). Self-organization is also needed for using features such as ADAPTATIONS (7) in a way that benefits the development of the ecosystem.

In a similar way, other niches of the open education ecosystem could be described through design patterns and discussed as a digital ecosystem. The following section presents a network of design patterns for blog-based open online courses.

6.2.2 Blog-based Open Online Courses

Studying the solutions for coordinating blog-based open online courses also resulted in 12 design patterns. The pattern network that shows the relationships between the patterns is presented in Figure 16.

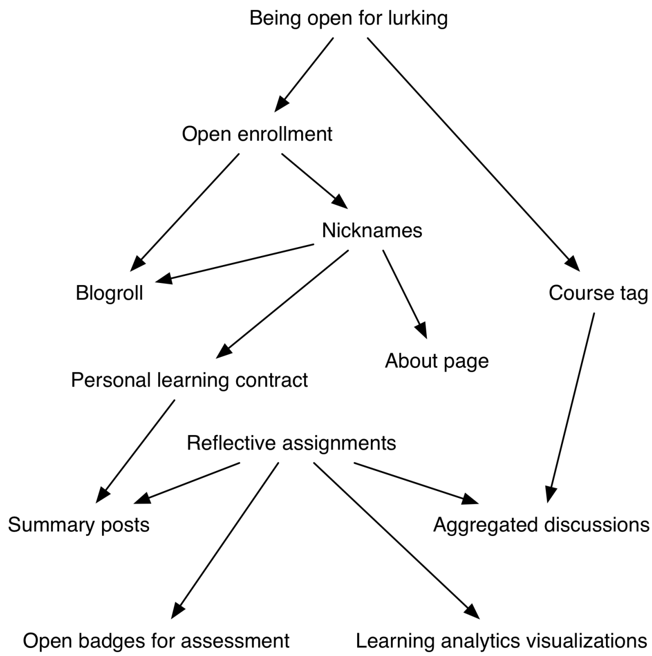

Figure 16. Pattern network for blog-based open online courses

In this context, the design patterns describe not only software implementations but also pedagogical approaches for addressing the identified design challenges. Two central patterns of this network are BEING OPEN FOR LURKING (13) and REFLECTIVE ASSIGNMENTS (21). While the former emphasizes the open nature of the courses, the latter describes main learning activities. Other larger patterns include OPEN ENROLLMENT (14), NICKNAMES (15), and PERSONAL LEARNING CONTRACT (17). Brief descriptions of the patterns are provided in the following section.

Design Patterns

Pattern 13: Being open for lurking
This pattern describes the open nature of blog-based online courses.

Online courses that take place in traditional learning management systems are typically accessible only for enrolled students. Also, many xMOOCs require learners to enroll to the course to see learning resources and course discussions. This limits learners access to the course, makes it more difficult to decide if the course would comply with their learning goals, and artificially raises the number of enrolled students. Having the ability to observe the learning activities would also be helpful to other teachers who could use experiences from open online courses as an initiative to improve their own courses.

Therefore: Open online courses should enable anyone to observe course discussions and access learning resources without enrolling to the course or logging in to the learning environment. In Internet culture, lurking is a common way of participating in online forums and other communities.

This is a central design pattern that is related to smaller patterns such as OPEN ENROLLMENT (14) and COURSE TAG (19) that is used in various online platforms. Being open for lurking is a general characteristic of open online courses that is not directly related to any of the specific design challenges.

Pattern 14: Open enrollment
This pattern deals with enrollment in the courses. It is related to the possibility of BEING OPEN FOR LURKING (13).

Blog-based open learning environments require a central coordination platform for managing enrollment to the course. In a simple case, people interested in participating the course could add their blog addresses to a wiki page. However, this requires a lot of manual work for subscribing to participant blogs. In many cases blog-based open online courses are run as extensions of formal higher education courses. It is possible, that too large number of informal participants would make it difficult to follow and support learners. It is important to find balance between massive openness and a functional learning community.

Therefore: Coordination platforms for blog-based open online courses should enable open enrollment. The facilitator of the course should be able to specify how long the course is open for enrollments. In a more advanced case, the coordination platform might also distinguish between different types of enrollments (formal participants, informal participants).

Open enrollment is related to two smaller patterns: learners should be able to use NICKNAMES (15) and the list of enrolled participants should be able to be copied as a BLOGROLL (18). This pattern addresses the lack of coordination structures for managing blog-based courses (C15).

Pattern 15: Nicknames
This pattern deals with privacy issues related to blog-based open online courses. The use of nicknames is part of OPEN ENROLLMENT (14).

In blog-based learning environments, anyone can read the discussions that take place in blogs. Typically learners write under their own name and blog posts written during the course become part of their online identity. However, this is not suitable for discussing sensitive topics. Also, some students do not want their learning process to be found with search engines. One option for these problems is to protect blog posts with a password that is known only to the facilitator. Unfortunately, this limits the possibility for other learners to read and comment on blog posts. Another option is to use a nickname that is known for the facilitator.

Therefore: It should be recommended for learners to write under a nickname, if the course involves sensitive discussion topics. The nickname should be known to the facilitator and depending on the context also for other learners.

Nicknames (or learners' real names, if preferred) are displayed in BLOGROLL (18). Other patterns related to the learners' identity are ABOUT PAGE

(16) and PERSONAL LEARNING CONTRACT (17). This pattern addresses the challenge of establishing and keeping the community gravity (C13).

Pattern 16: About page

This pattern deals with introducing learners to each other. It is connected to other identity-related pattern of using NICKNAMES (15).

Blog-based open online course may have a large number of participants that do not know each other. One option to introduce learners to each other is to write a blog post with a personal introduction. However, this post will soon become hidden behind more recent posts. Also, learners often use the same blog for several courses. This would result in multiple personal introduction posts. Another option is to write a personal introduction on a page that is displayed separately from blog posts. The WordPress blogging platform has an example page named *About* that is set up with every new installation.

Therefore: Learners should be guided to use the *About* page for writing their personal introduction. This personal introduction should also include their photo or avatar. As blog pages support embedding, this could also feature a short video greeting from the learner. This pattern is named after a feature in WordPress blogging platform. Some other blogging platforms may have a different place for writing a short personal introduction (e.g. sidebar and profile page in Blogger).

This pattern addresses the challenge of establishing and keeping the community gravity (C13).

Pattern 17: Personal learning contract

This pattern deals with supporting learners to set up their personal learning goals and strategies. It is linked to the other identity-related pattern of using NICKNAMES (15).

Blog-based open online courses attract a variety of participants with different goals. Learner-centered approaches are needed to keep learners motivated. One possible method to engage learners in planning their personal learning is to use learning contracts. Knowing learners' goals helps the facilitator to direct the course according to learner needs. Having a large set of learning contracts would also open up possibilities for connecting learners with similar goals, providing visualizations of learning contract data and performing learning analytics.

Therefore: Participants should be encouraged to establish their personal learning goals and strategies. This could be done through writing personal learning contracts. The facilitator and other learners should be able to give feedback to learning contracts. Learning contracts are typically elaborated and revised during the course. At the end of the course, learning contracts are used for self-evaluation. The tool used for writing learning contracts should support versioning and commenting of specific parts of learning contracts.

The facilitator would write a SUMMARY POST (22) based on personal learning contracts. This pattern is related to two design challenges: supporting learners with setting up their personal learning goals and strategies (C10) and commenting and versioning of learning contracts (C17).

Pattern 18: Blogroll

This pattern deals with providing access to other learners' blogs. It is related to two broader patterns: OPEN ENROLLMENT (14) and NICKNAMES (15).

In blogs, a common way of listing related blogs is using a links menu that is displayed on the sidebar. This links menu is known as *blogroll*. In open online courses, blogroll could be used for listing course participants and their blogs. However, with a large number of participants, it is not feasible to manage the blogroll manually.

Therefore: Blogroll should be used in course blog for providing access to all participant blogs. The coordination platform for blog-based open online courses should support keeping the blogroll updated. EduFeedr provides a blogroll code, that could be copied to the sidebar widget in the WordPress blog. A more advanced coordination platform could provide an embeddable blogroll widget that is updated automatically.

Blogroll pattern addresses the lack of coordination structures for managing blog-based courses (C15).

Pattern 19: Course tag

This pattern deals with annotating course-related resources in various online platforms. It is related to a larger pattern about BEING OPEN FOR LURKING (13).

In a typical blog-based open online course, a selection of other online platforms are used in addition to blogs. Common examples include Twitter for microblogging, SlideShare for presentations and YouTube for videos. Many of these platforms allow users to describe published content with tags. It is possible to link to a page that lists all resources having the same tag. Some of the platforms also provide RSS feed for each tag.

Therefore: The facilitator should suggest a course tag and guide participants to use this tag when publishing course related content in various online platforms. The course blog should link to a tag page in commonly used online platforms. In a more advanced case, a course coordination platform could also aggregate new resources using RSS feeds.

Resources tagged with a course tag could be presented in a similar way as AGGREGATED DISCUSSIONS (20). This pattern is related to the lack of coordination structures for managing blog-based courses (C15).

Pattern 20: Aggregated discussions

This pattern deals with combining online discussions that are fragmented between different platforms. It is related to broader patterns such as REFLECTIVE ASSIGNMENTS (21) and COURSE TAG (19).

One of the challenges of blog-based learning environments is the fragmentation of discussions. A coordination tool for blog-based courses could aggregate blog posts and comments from the course blog. A simple approach would mean displaying a fixed amount of most recent content. Depending on the number of participants and activity of discussion, there may be a need for highlighting certain posts or displaying only a selection of content. It is also important to consider that some people prefer to use their own feed reader.

Therefore: The coordination platform for blog-based open online courses should aggregate new blog posts and comments from participants' blogs. EduFeedr displays aggregated posts and comments in the course front page. In addition to displaying aggregated comments, the coordination tool should provide RSS feeds that allow learners to use their preferred feed reader for following course discussions. EduFeedr provides combined RSS feeds in OPML format for all course blogs.

This pattern addresses two design challenges: the fragmentation of discussions in blog-based courses (C14) and lack of awareness support mechanisms (C16).

Pattern 21: Reflective assignments

This pattern deals with assignments in blog-based open online courses.

Assignments are more typically associated more with formal education rather than with informal learning. However, they provide a way in which to frame the learning activities in blog-based courses. It is a challenge to come up with assignments that prompt all learners to submit original and valuable ideas related to the same problem. Assignments that are too strictly defined may compromise the originality of the learners' posts.

Therefore: Blog-based open online courses should have an individual blogging assignment with each major topic. Assignments should be posted with a regular interval, typically weekly or bi-weekly. The nature of assignments should encourage discovery learning, reflection and discussion. Often the assignment may consist of a theoretical and practical part, both of which should be reflected in a blog post. Learners' posts in blog-based courses should be seen as an important part of the learning content.

As one of the central patterns, it is related to four smaller patterns. Learners' blog posts submitted for assignments are displayed under AGGREGATED DISCUSSIONS (20) and provide data for LEARNING ANALYTICS VISUALIZATIONS (23). The facilitator will write SUMMARY POSTS (22) based on learners' work and use OPEN BADGES FOR ASSESSMENT (24). This pattern addresses the pedagogical design challenge regarding the danger of overscripting (C12).

Pattern 22: Summary posts

This pattern deals with summarizing course topics. It is related to broader patterns regarding REFLECTIVE ASSIGNMENTS (21) and PERSONAL LEARNING CONTRACTS (17).

It is not realistic for the course facilitator to comment on all blog posts that evoke thoughts. Also, the facilitator has to keep in mind that he/she should create opportunities for discussion, not have a leading role in the discussion. On the other hand, learners see comments and feedback as a motivating factor. Some simple ways to acknowledge learners' for their blog posts is to like good posts (feature available in WordPress) and to write a summary that contains links to the best learners' posts.

Therefore: The course facilitator should write a summary post for each assignment. This summary post should outline the main themes from the blog posts, cite interesting thoughts, link to the most active comment discussions, and point out possible controversies or misunderstandings. When mentioning specific learners, the summary should contain a link to their blog posts. The course coordination platform could track links to learner blogs and use this information for learning analytics and visualizations.

Summary posts address three design challenges: keeping the learner motivation throughout the learning project (C11), establishing and keeping the community gravity (C13), and the lack of awareness support mechanisms (C16).

Pattern 23: Learning analytics visualizations

This pattern deals with visualizing the data about REFLECTIVE ASSIGNMENTS (21) and other learning activities.

Blog posts, comments and links between the blogs provide an interesting data set that could be used for learning analytics and visualizations. Learners would benefit from the possibility of being able to compare themselves with their peers. Following a large number of participants is easier if it is known which ones are still actively participating in course activities. The facilitators would also benefit from identifying learners who are alone in the community and might need support. As the learning activities in blog-based courses are public, then the learning analytics based on this data could also be public. Privacy concerns could be addressed by other measures such as by using NICKNAMES (15).

Therefore: The coordination platform for blog-based open online courses should provide learning analytics based on blog posts, comments and links between the blogs. EduFeedr provides a progress visualization that displays submitted assignments and social network visualization that is based on comments and links between learners' blog posts. All these visualizations are public. Depending on the capabilities of the coordination platform there could be various additional visualizations, as discussed in Põldoja et al. (2016).

This pattern addresses the lack of awareness support mechanisms (C16).

Pattern 24: Open badges for assessment

This pattern deals with assessment and recognition of learners' competencies acquired through REFLECTIVE ASSIGNMENTS (21).

Blog-based open online courses raise a number of assessment issues such as private grading and recognizing the work of informal participants (Põldoja & Laanpere, 2014). One solution for these issues is the use of open badges. A badge scheme for the course should be developed so that it motivates learners and provides a choice of learning activities. Badges could be awarded manually by the facilitator or automatically based on learning analytics.

Therefore: Open badges should be used for assessing learners' posts and recognizing any achieved competencies in blog-based open online courses. In order to distinguish exceptional works, there should be several levels of badges (for example a "Gold" badge that is awarded for outstanding blog posts). Learners should have multiple possible paths for doing the assignments and acquiring badges. In addition to badges awarded for blogging assignments, there could be other types of badges for recognizing a learners' contribution to the course (activity in discussions, providing support for other learners, etc.).

The use of open badges for assessment is related to the following pedagogical design challenges: supporting learners with setting up their personal learning goals and strategies (C10), keeping the learner motivation throughout the learning project (C11), and the danger of over-scripting (C12).

Summary

In the context of blog-based open online courses, only the technical design challenges were addressed with patterns identified from the implementation of the EduFeedr tool. EduFeedr supports OPEN ENROLLMENT (14), PROVIDES BLOGROLL (18), AGGREGATED DISCUSSIONS (20) and LEARNING ANALYTICS VISUALIZATIONS (23). Support for COURSE TAG (19) is partly implemented; the actual aggregation of content from Web 2.0 platforms that provide RSS feeds for tags is not implemented. Pedagogical and socio-cultural design challenges were addressed with patterns that described pedagogical approaches and the use of other online tools such as blogging platforms.

The mapping of design challenges and design patterns for blog-based open online courses is presented in Figure 17. In this context, the central design challenges were (C15) lack of coordination structures for managing blog-based courses, (C16) lack of awareness support mechanisms, and (C13) establishing and keeping the community gravity.

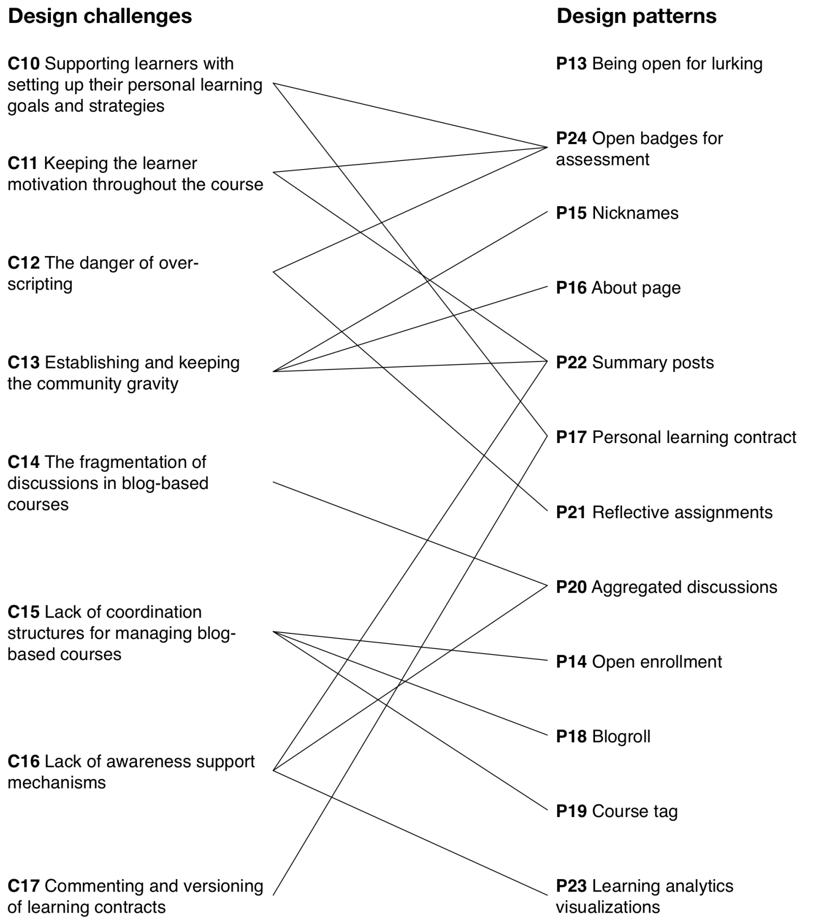

Figure 17. Mapping of design challenges and patterns for blog-based open online courses

From the digital ecosystems perspective, blog-based open online courses have certain differences when compared with OER authoring platforms. Whereas collaborative authoring of OER's takes place in a central authoring platform, blog-based open online courses are organized in a distributed learning environment that consists from a number of blogs and other online tools. Interaction between the blogs and other online tools used in the course is achieved through AGGREGATED DISCUSSIONS (20) and the use of a COURSE TAG (19). In the context of blog-based open online courses, a balance must be achieved between the learners' different expectations, goals and contributions to the course. BEING OPEN FOR LURKING (13) means that learners do not have to enroll in the course if they only want to access the content or follow course discussions. Encouraging learners to write PERSONAL LEARNING CONTRACTS (17) and providing different learning paths through using OPEN BADGES FOR ASSESSMENT (24) supports the balance between different learning goals. Balance in the learning community can be also strengthened through carefully written SUMMARY POSTS (22) that refer to the learners' blog posts. Blogs and blog posts are loosely connected through BLOGROLL (18), AGGREGATED DISCUSSIONS (20), and SUMMARY POSTS (22). The most obvious example of self-organization in blog-based open online courses is open enrollment (14). Having public LEARNING ANALYTICS VISUALIZATIONS (23) also contributes to learners' self-organization.

Some of the patterns identified in the context of collaborative authoring of OER's could be also used in blog-based open online courses. For example, it is possible to add external content to blog posts through EMBEDDING (3). LINKEDNESS (4) is also a more general pattern that is used in many online contexts. Design patterns identified in this study provide input for discussing the general structure and components of the open education ecosystem.

6.3 The Structure and Components of the Open Education Ecosystem

Previous sections examined the design challenges and recommended design patterns for two specific contexts of open education. These patterns approached open education as a digital ecosystem that consists of connected online learning tools and various stakeholders. In order to successfully apply these patterns, it is also important to understand the general structure and components of the open education ecosystem. The Oxford English Dictionary defines structure as "the arrangement and organization of mutually connected and dependent elements in a system or construct" ("structure, n.", 2014). Structure and components are commonly used concepts when describing ecosystems (Begon et al., 2006). Generally, the structure of an ecosystem is composed of biotic and abiotic components that share relationships and influences between them.

In Section 2.3.3, the open education ecosystem is defined as a learning ecosystem that consists of tools, services, resources and stakeholders who share a common set of values. The core value that defines the extent of the OEE is openness. The dissertation adopts the concept and representation of the learning ecosystem (Chang & Guetl, 2007; Gütl & Chang, 2008) as a basis for presenting the structure of the open education ecosystem. The approach of these researchers (elaborated in Section 2.3.3) defined the biotic components of the ecosystem as learning stakeholders and abiotic components as learning utilities. Conditions of the ecosystem were influenced by internal and external influences. The extent of the ecosystem was limited by the learning environmental boundaries. A simplified representation of the open education ecosystem is presented in Figure 18.

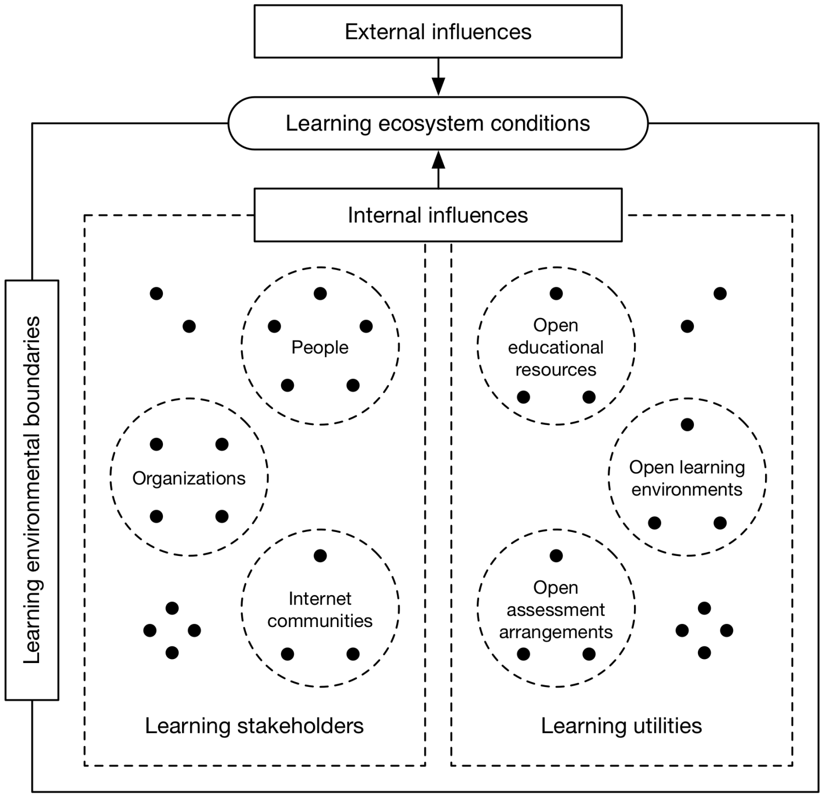

Figure 18. Simplified representation of the open education ecosystem (based on Gütl & Chang, 2008)

Design cases included in this dissertation focused on three contexts: authoring and sharing platforms for open educational resources, blog-based open online courses, and assessment and recognition of competencies. These three contexts identify the three types of learning utilities for the open education ecosystem. Generally, these types of learning utilities could be defined as open educational resources, open learning environments, and open assessment arrangements. Learning stakeholders include different people, organizations and Internet communities who are using the learning utilities or influence the ecosystem in some other way.

This study is approaching the open education ecosystem as one global digital learning ecosystem. In order to understand the extent of the OEE, its boundaries must be defined more precisely. As stated earlier, the core value that limits the extent of the OEE is openness. However, as the theoretical overview in Section 2.2 demonstrates, openness in education can be understood from multiple perspectives. In this study, the learning environmental boundaries of the open education ecosystem are defined through three characteristics: (1) open access, (2) open licensing, and (3) open participation. At the very basic level, there must be no-cost access that enables the reuse of educational content. Open licensing enables revising, remixing and redistributing of educational resources. In addition to content, open education covers various educational activities and practices. The general characteristic of these activities is free and open participation. There are also situations where these boundaries may be disputed. Is it an open educational resource that is published under a Creative Commons license that does not allow the creation of derivative works? Nowadays, many courses that are called MOOCs provide only free participation and access to learning resources, but the learning resources itself are not published under open licenses. In that case it is possible to argue that learning activities in the course belong to the open education ecosystem, but the educational resources are outside the boundaries of the OEE. Behind the boundaries of the OEE there are other digital learning ecosystems that are not based on the principles of openness (e.g. xMOOC platforms, iTunes U[29]).

To discuss the internal and external influences on the open education ecosystem, we must look more precisely on the learning stakeholders and learning utilities that belong to the OEE. A better understanding of learning stakeholders involved in the open education ecosystem can be achieved through the design process. As discussed in Section 2.4.1, design can be seen both as a process and as a communication. This communication involves various stakeholders that are described in design artifacts such as personas and scenarios. In participatory design approach, these stakeholders are also involved in various phases of the design process. A set of stakeholders can be derived from personas and scenarios developed in five design projects included in this dissertation. Additional stakeholders were identified during the actual use of software prototypes. However, it must be stated that this study does not provide a complete list of learning stakeholders for the open education ecosystem. Designing for different contexts of open education may reveal additional learning stakeholders. A more detailed representation of learning stakeholders is presented in Figure 19.

[29] http://www.apple.com/education/itunes-u/

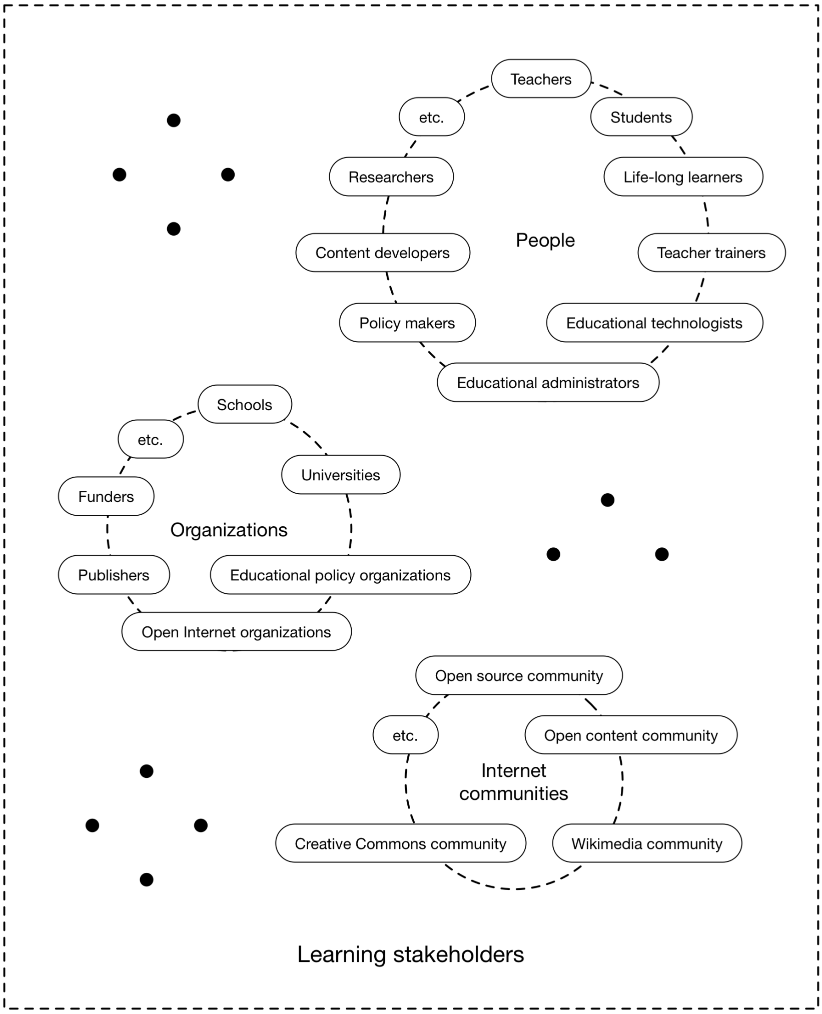

Figure 19. Learning stakeholders of the open education ecosystem

The target group of online learning designed tools in this study includes teachers and students from schools and from higher education. The OER tools LeMill and PILOT were designed with a focus on schools, while EduFeedr and LeContract were targeting higher education and life-long learning. DigiMina was aimed at school teachers and teacher education students. Assessment of teachers' educational technology competencies is a complex issue that involves additional stakeholders such as teacher trainers, educational technologists and school administration, educational policy makers, and researchers. For OER tools, professional content developers were also seen as possible contributors. Schools, universities, educational policy organizations, publishers, funders, and open Internet organizations are all organizations that can be seen as important stakeholders in the open education ecosystem. Thirdly, there are various communities that are involved in shaping the open education ecosystem. These include open source community, specific open content communities such as Creative Commons and Wikimedia communities, and a wider community of amateur authors who publish their works under open licenses. Taking into consideration the interests of various learning stakeholders is crucial for achieving the balance and sustainability of the open education ecosystem.

The learning utilities part of the open education ecosystem includes tools and resources that are used in various areas of open education. This study identified three core areas of learning utilities: (1) open educational resources, (2) open learning environments, and (3) open assessment arrangements. These areas of learning utilities are presented in Figure 20.

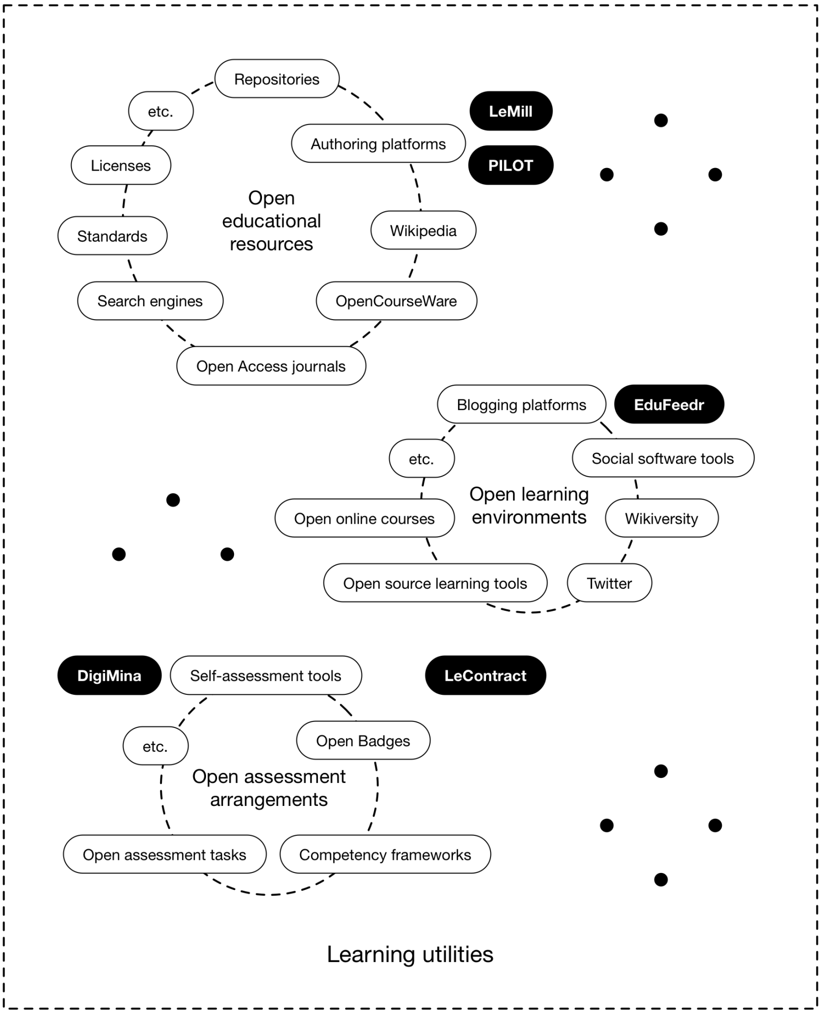

Figure 20. Learning stakeholders of the open education ecosystem

Open educational resources have been the main area of development in open education. A number of repositories have been set up for sharing OER's. There are both special authoring platforms for OER's and generic learning resource authoring tools that are used for open education. LeMill and the PILOT template are examples of authoring tools. Several universities have set up OpenCourseWare portals for distributing full courses. A lot of valuable content for open education is developed in Wikipedia and other wikis run by the Wikimedia Foundation. At higher levels of education, research publications are also an important component of educational content. Outcomes of scientific research can be published in open access journals and preprint versions of publications can be made openly available. In order to find and reuse resources there is a need for search engines, interoperability standards, and open licenses.

Open learning environments are an area of the open education ecosystem where open online courses and various other learning activities take place. Tools used for setting up open learning environments include blogging platforms, microblogging platforms such as Twitter, educational wikis, and other social software tools. There is a variety of open source learning tools that could be used in open learning environments. Depending on the way they are set up and used, learning management systems such as Moodle could also be part of an open learning environment. From the tools designed in this study, EduFeedr belongs clearly to open learning environments. LeContract is related both to open learning environments and to open assessment arrangements.

Open assessment arrangements include self-assessment tools that can be used by the learners, competency frameworks, assessment tasks and task authoring tools, and tools for creating, issuing, storing and displaying Open Badges. DigiMina is a self- and peer-assessment tool that was implemented for assessing teachers' educational technology competencies. However, with a different competency model and assessment tasks it could be used for assessing other types of competencies. Assessment tasks published under open licenses could be also considered as open educational resources.

The interoperability between the learning utilities is enabled by following the standards and design principles of the open web. For example, blog-based courses coordinated with EduFeedr may refer to learning resources published in LeMill. These learning resources may include embedded media content from other web sites. Information about new blog posts, comments or learning resources is aggregated using RSS feeds.

In addition to specific learning tools, design patterns that these tools are based on, can also be seen as components of the ecosystem. These design patterns can be reused for addressing similar design challenges when designing other learning tools for open education.

This structure of learning utilities can be related to earlier discussions on tools and services for open education. In the early 1970s, Illich (1971/2011, p. 78–79) proposed the idea of learning webs that had four types of networks: reference services to educational objects, skill exchange networks, peer-matching networks for finding similar learners, and reference services to educators. LeMill and other OER tools can be seen as reference services to educational objects. DigiMina is an example of a skill exchange network that allows teachers to create public competency profiles. LeContract should help learners to find peers with similar learning goals. Illich's idea of listing educators who are willing to offer their services has been realized in a form of open online courses that are offered through various platforms, including EduFeedr. Wiley (2015) proposed four parts for the open education infrastructure: open credentials, open assessments, open educational resources, and open competencies. In this thesis, open credentials (Open Badges) and open competencies are both seen as part of open assessment arrangements. By listing these as separate parts of the infrastructure, Wiley emphasized that the focus of research and development should expand from OER's to these areas of open education. Notably, Wiley's interpretation missed open learning environments, the area where the actual social learning activities take place.

Learning ecosystem conditions depend on internal and external influences. These influences are related to design challenges described in Section 6.1. Typically, the design challenges cannot be categorized strictly as internal or external influences. For example, challenges such as establishing the community gravity (C13) and keeping learners motivated (C11) are influenced both by internal and external factors. Technical design challenges can be seen as internal influences, when they are related to the tools used only for open education. However, in many cases learning tools are used in different contexts. Challenges related to new pedagogical methods (C2) and competency frameworks (C18, C19) can be considered as external influences. There are additional internal and external influences that are not identified as design challenges in this study. These internal influences are related to business models and sustainability of the ecosystem. External influences include also educational policies and funding.

6.4 Summary

This dissertation studied three areas of open education through five design cases. The contexts studied include collaborative authoring of OER's, blog-based open online courses, and assessment and recognition of competencies. In each design case, important design challenges were identified. As a first result, this dissertation summarizes 22 design challenges for open education. Secondly, this study focused on two contexts where the designed tools were taken into long-term use by a larger group of teachers and learners. As a second result, 24 design patterns were identified for collaborative authoring of OER's and blog-based open online courses. These design patterns address the design challenges identified in this study. The third result of the dissertation is the conceptual model of the open education ecosystem. This model describes the biotic and abiotic part of the ecosystem, its boundaries, and influences affecting the conditions of the ecosystem. Three main types of learning utilities in the open education ecosystem include open educational resources, open learning environments, and open assessment arrangements. Both design patterns and design challenges are also components of the ecosystem. The theoretical and practical value of these results will be discussed in the next chapter.

7. Discussion

The final chapter discusses the theoretical and practical implications of this study. Discussing the validity, reliability and limitations of the study provides a critical assessment of the research outcomes. The chapter ends with providing possible directions for further research.

7.1 Theoretical Implications

In recent years there has been a number of doctoral dissertations on open education. The majority of these works approach open education from the theoretical research perspective and focus on a specific area of open education such as open educational resources (Algers, 2015; Kozinska, 2013; Porter, 2013), open courses and learning environments (Meiszner, 2010; Spoelstra, 2015), and economical issues (Liu, 2011; Ondercin, 2011). While some of these works involve the design of pedagogical interventions for open online courses (Meiszner, 2010; Spoelstra, 2015) and open educational resources (Algers, 2015), none of these works establish design research as the main approach for studying open education.

My dissertation has combined design practice with theoretical design studies. Basing the study on interaction design projects has made it possible to involve teachers, learners and other stakeholders from the early phases of the design process to the actual use of the designed prototypes. Observing the actual use of designed prototypes has provided an important input for understanding how these tools relate to other components of the open education ecosystem. Furthermore, focusing on different aspects of open education has been important for recognizing the general structure of the open education ecosystem. Thus, the value of this dissertation lies in taking a wider perspective on open education and studying it through the design practice.

The theoretical results of the dissertation contribute mainly to the field of open education by providing a deeper understanding of the open education phenomena in the era of digital ecosystems. Some of the results are valuable also for other related fields of research. For example, some of the identified design challenges and patterns may also be useful in other contexts of technology-enhanced learning such as designing virtual learning environments.

Another theoretical result is in the area of design challenges for open education. Although there are earlier studies about the design challenges for open educational resources (Conole & McAndrew, 2010) and MOOCs (Beaven, Hauck, Comas-Quinn, Lewis, & de los Arcos, 2014), my research provides a comprehensive set of design challenges. Current research on design patterns for open education focuses mainly on pedagogical patterns for reuse of OER (Conole, McAndrew, & Dimitriadis, 2011) and design of MOOCs (Hatzipanagos, 2015; Koppe et al., 2015; Lackner, Ebner, & Khalil, 2015; Littlejohn & Milligan, 2015; Liyanagunawardena, Kennedy, & Cuffe, 2015; Mor & Warburton, 2015). This study differs from the related work by providing a set of patterns that cover both pedagogical practices and their implementation in software.

7.2 Practical Implications

The results of this study provide practical value for designers and other stakeholders involved in designing online learning tools for technology-enhanced learning in general and open education in particular.

At first, this study helps in the understanding of complex and interlinked design challenges related to collaborative authoring of OER, blog-based open online courses, and assessment of competencies. While every design context has its own specific design challenges, the set of challenges identified in this study provides guidance and examples that help designers to translate the wicked problems common in technology-enhanced learning field to more specific design challenges in their design situation.

Design patterns about collaborative authoring of OER are valuable for interaction designers who design authoring tools, repositories and other software for creating, sharing and reusing learning resources. While this study focused specifically on open educational resources, many of these patterns are also relevant for non-open digital learning resources. Several patterns that were successful in LeMill have been later implemented in other online learning platforms developed in Estonia (Koolielu[30], e-Koolikott[31]), for example TOOL DESCRIPTIONS (9), COLLECTION (10), and TEACHING AND LEARNING STORY (11).

Design patterns about blog-based open online courses are valuable both for interaction designers as well as teachers and instructional designers developing online courses. Open online courses applying the design patterns described in this study end up to be as recipe books that allow other educators to learn from good pedagogical practices and use them in their own courses. Design patterns provide a structured way of documenting these practices.

The practical value for many teachers and learners are the actual online learning tools designed and developed during this study. Two tools in particular — LeMill and EduFeedr — have been taken into a wider use. These tools have not been designed to support teachers' existing practices, but to influence teachers in changing their practices towards more open and personal learning. Therefore, this study has contributed to the educational change.

[30] http://koolielu.ee

[31] https://e-koolikott.ee

The results of this study are important also for policy making. Ecosystem thinking would help policy makers to understand which learning stakeholders should be involved in design and decision making processes, what are the learning utilities needed to support open education, and how different components of open education are related to each other. It is also necessary to think about how open education fits into a larger digital ecosystem that is an important part of daily life for modern learners.

7.3 (In)validity and (Un)reliability

Academic research is assessed through qualities such as *validity* and *reliability*. In a basic level, validity can be described as the degree to which a particular research instrument measures what it is supposed to measure (Cohen et al., 2007, p. 133). Reliability means that two or more researchers studying the same phenomenon should achieve compatible results when following the same procedures with a similar group of participants in a similar context. Cohen et al. (2007, p. 148) point out that in qualitative research the strict replication of research procedures is sometimes problematic or even undesirable, thus reliability cannot be approached in a same way as in quantitative research. This is also true in design research. Fallman and Stolterman (2010) argue that it is very unlikely that two designers would come up with exactly the same result, even if they would have the same design context, materials, tools and users. They dispute the fact that in case of design research, one could value the "invalidity" and "unreliability" that comes from the creative design process and different ways of seeing things.

According to Fallman and Stolterman (2010), the three forms of interaction design research (discussed in Chapter 3) should be assessed in a different way, as each form of research has its own purposes, methods, internal logic and outcomes. In design practice, the most important assessment criteria are the relevance of the final design for the client and users — it has to be useful and make sense. The process of design exploration is assessed by how well it opens up critical and creative approaches that challenge the mainstream design solutions. The degree to which the results can be generalized provides the assessment of the design studies.

This study has used multiple approaches to achieve validity and reliability. In order to increase the internal validity, the design cases involved in this study have used multiple design researchers, involved participants as designers, and applied peer-examination of research data, as recommended by Cohen et al. (2007, p. 135). The design processes themselves involve multiple methods and types of data, which has increased the validity of the design decisions. The use of the triangulation of multiple methods and data sources, as discussed in Section 3.2, supported the validity of the design studies phase.

7.4 Limitations of the Study

This study has also a number of limitations that should be discussed. The long time frame that was required to complete the study can be seen both as a limitation and as an advantage. The design challenges for open educational resources were identified a decade ago. Some of these challenges are not that critical today, for example the usability of OER authoring tools has improved (challenge 8). On the other hand, the long duration of the study helped to take a wider perspective on open education and witness the rise of new areas in open education such as open online courses and open badges.

The second limitation is related to the fifth design case about web-based self- and peer-assessment of teachers' educational technology competencies. The DigiMina tool was not taken into wider use as the initial plans to integrate it with the Estonian national education portal did not succeed. Therefore this tool was evaluated only in a pilot study with 50 teachers and part of the assessment tasks. Due to lack of real life use it was not possible to identify design patterns for assessment and recognition of competencies.

Thirdly, the design patterns have not been validated in participatory design workshops. Mor and Warburton (2015) have proposed the participatory pattern workshop methodology, in which design patterns are developed in a collaborative way through a series of workshops. In my study, the participatory design sessions were organized in the early phases of each design case to discuss and evaluate the scenarios about the designed tools. Successful design patterns were identified and documented by me after the tools were taken into actual use. Thus, the patterns are based on stakeholders' feedback and end users activities. Validating the patterns through participatory design workshops is one possible task for future research.

7.5 Recommendations for Further Research

This study covered a selection of topics related to open education, such as open educational resources, open learning environments, and open assessment. Having a wider perspective of the area studied opens up a number of possible directions for future research.

As mentioned in the previous section, the set of design patterns developed in this study could be validated through participatory pattern workshops with various learning stakeholders. These workshops would also provide the possibility of identifying additional patterns and extending the pattern language.

Regarding open educational resources, the most interesting direction for future research is related to creating adaptations of OER's. As discussed in Section 6.2.1, the current implementation of the ADAPTATIONS (7) pattern in LeMill was not successful. The increasing number of open educational resources makes reuse an important issue. Thus, there is a need for flexible and user-friendly solutions for adapting the learning resources to a specific context.

With open learning environments, two possible future directions are related to learning analytics and the danger of over-scripting. The current implementation of EduFeedr had some basic learning analytics visualizations such as learner progress and social network. However, detailed analysis of the aggregated blog posts and comments opens up a number of additional possibilities for learning analytics. Visual representation of this data provides awareness support for learners and facilitators regarding their personal learning and ongoing learning activities. The danger of over-scripting in blog-based courses is a more pedagogical issue that needs further research. Suitable pedagogical practices for blog-based open online courses could be described as additional patterns.

For me personally, the most interesting future direction is to move back to the areas of design practice and design exploration. I am interested in exploring the possibility of combining personal learning contracts, self- and peer-assessment, and open badges. The future prototype of LeContract could provide a visual learning path in which learners can specify their personal learning goals and open badges that they plan to achieve. The assessment could involve some aspects of self- and peer-assessment. Implementing such a system in practice would make it possible to identify a set of design patterns for open assessment.

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Aalto-DD 175/2016

ISBN 978-952-60-6994-4 (printed)
ISBN 978-952-60-6993-7 (pdf)
ISSN-L 1799-4934
ISSN 1799-4934 (printed)
ISSN 1799-4942 (pdf)

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