Fostering governmental support for open educational resources

The 2012 World OER Congress[1]

Sir John Daniel

Introduction

Open Educational Resources (OER) are part of a wider trend towards greater openness and sharing that has been gathering momentum for over 20 years. It is helpful to divide its manifestations in education into three elements, all of which figure prominently in UNESCO's work and are inter-related.

The term 'open access' is usually used to refer to open access to research results, especially where the research has been supported by public funds. The open access movement is thriving and controversies about access to research journals have been in the news recently, with major universities refusing to pay the high prices demanded for commercially published scientific journals.

Box 1

The Commonwealth, UNESCO and OER

The Commonwealth of Learning (COL) is an intergovernmental organisation that helps Commonwealth governments and institutions use various technologies to improve and expand education, training and learning in support of development. Thirty-two member states of the Commonwealth are actively engaged in developing OER under COL's Virtual University of the Small States of the Commonwealth (VUSSC) initiative.

Fostering Governmental Support for Open Educational Resources Internationally was implemented by a partnership between the COL and UNESCO with partial support from the William and Flora Hewlett Foundation.

The project had four elements:

1. A survey of the world's governments to determine whether they have, or intend to develop, policies for the use of OER.
2. The holding of regional policy forums in six world regions.
3. The World OER Congress held in Paris from 20–22 June 2012.
4. The Paris Declaration presented at the Congress.

The 2012 World OER Congress was partly a celebration of the tenth anniversary of the 2002 Forum that created a global movement for the open licensing of educational and creative works. Since that first event, UNESCO has continued to promote the OER movement globally. In 2009, the UNESCO World Conference on Higher Education brought together close to 2,000 participants representing higher education worldwide.

OER are defined as educational materials that may be freely accessed, reused, modified and shared. I make the point that this includes materials in all formats. While nearly all OER are generated through digital technology, they are often used in print format. This is the case, for example, in what is probably the largest international OER project, Teacher Education in Sub-Saharan Africa (TESSA), where OER are used by hundreds of thousands of teachers annually in at least 12 African countries.

The term Open Educational Resources, or OER, was coined at a forum held at UNESCO in 2002. The topic was the *Impact of Open Courseware for Higher Education in Developing Countries* and reflected the growing movement to make educational materials freely available for adaptation and reuse. Participants declared 'their wish to develop together a universal educational resource for the whole of humanity, to be referred to henceforth as Open Educational Resources'.

When the OER movement began it was motivated primarily by the ideal that knowledge is the common wealth of humankind and should be freely shared. Most institutions that decided to implement the ideal by creating OER relied on donor funding, notably from the William and Flora Hewlett Foundation. But as the OER movement developed, questions about its sustainability became increasingly pressing. It could not rely indefinitely on donor funding. Institutions and governments began to review the economics of OER in order to determine whether there was a business case for investing in them.

It was not the purpose of this project to propose particular approaches to open licensing but governments and institutions should give attention to this issue (see Box 1 for project stages).

Survey of governments

With awareness of the importance of OER steadily increasing, a first step was to discover more about the expectations of governments for OER and whether they were developing policies for their use. So we conducted a questionnaire survey of all governments. The 82 responses received before the cut-off date of 16 April 2012 were analysed by consultant Sarah Hoosen in South Africa, whose report concluded:

> There appears to be great interest in OER across all regions of the world, with several countries embarking on notable OER initiatives. Indeed, the survey itself raised interest and awareness of OER in countries that may not have had much prior exposure to the concept. However, different regions face

different obstacles to OER adoption, while few explicit OER policies exist and there appears to be some confusion regarding understanding of the concept and potential of OER. Many projects are geared to allowing online access to digitized educational content, but the materials themselves do not appear to be explicitly stated as OER. Where licences are open, the Creative Commons framework appears to be the most widely used licensing framework, but licensing options varies between countries.

Regional policy forums

The second element of the project has been the holding of regional policy forums in six regions. Although the questionnaire survey was very useful, we also wanted to promote dialogue between government policy-makers and OER practitioners around the world.

The first forum was held in January 2012 for the Anglophone **Caribbean** in conjunction with an ICT in Education Leadership Forum based on UNESCO's Competency Framework for ICT for Teachers. Most Caribbean countries are introducing computers into their schools, and the lack of good learning materials for this purpose made them very receptive to the notion of Open Educational Resources.

Our next forum, for **Africa**, took place in February in South Africa at the University of South Africa (UNISA). Seventeen African nations reported on the status of OER in their countries. Although none, with the exception of South Africa, has a distinct governmental policy on OER, the majority are active in the OER movement, mainly through institutions and individuals. In the minds of most respondents, OER are closely associated with the introduction of ICT in education or with the development of open and distance learning, or both.

These results from Africa showed the progress that has been made since the 2009 World Conference on Higher Education at which there was a vigorous debate between two South Africans.

Professor Brenda Gourley, then Vice-Chancellor of the UK Open University (UKOU), explained how the UKOU was making much of its course material available as OER on its OpenLearn website. However, Professor Barney Pityana, then Principal of UNISA asked if OER were not potentially a form of neo-colonialism, with the north pushing its intellectual products at the south. It now seems that this was one occasion when flagging a potential problem early helped the world to avoid it.

At the Africa forum, we found a vibrant culture of creation, re-use and re-purposing of OER. UNISA now has a proactive institutional strategy in favour of OER.

The flow of OER is also becoming truly multi-directional and global. For example, OER created at the Kwame Nkrumah University of Science and Technology in Ghana are used at the University of Michigan. Similarly, medical OER from Malawi have found their way into teaching in a number of other countries.

For the forum for **Latin America**, we went to Rio de Janeiro, where ten countries reported on the status of OER. The majority said that they have some governmental strategy or policy related to OER or intend to develop one. Many of the countries have educational portals and also a range of policy documents that cover ICTs and Open and Distance Learning, some of which include OER.

The forum for the **Europe** region was held at Cambridge University. Eighteen countries in the Europe region responded to our survey. Of these, Austria, Finland, Hungary, the Netherlands, Poland and Slovenia are the most active in taking advantage of OER. Some, such as Austria and the Netherlands, would like to see an EU directive on OER to encourage a pan-European approach. These governments have invested significant funds in the development of OER, often through higher education institutions that then have an obligation to share their OER products.

The **Asia-Pacific region** is large and diverse, which was reflected in the responses to our survey from 19 countries. Five of these countries report that they have government policies on OER in place. Most of these refer explicitly to the open licensing of educational materials. Australia, for example, places OER in the wider context of its policy of opening up public data and resources through the government's Open Access and Licensing Framework. In this context, a number of Australian states reported on their different approaches to OER. In China, the Ministry of Education has an OER policy, within which it has developed several OER action plans. Examples involving Chinese universities are the Video Open Courseware project and Open Digital Learning Resources for Continuing Education. Korea has a governmental policy called the Korean Open Courseware Information Strategy Plan and an ISP for a National OER repository.

The Government of Oman hosted the regional policy forum for the **Arab states** in Muscat. Eleven countries reported on the status of OER. Although none have explicit governmental policies on OER, five have a strategy related to e-Education or e-Learning that includes or could include OER. Examples are Algeria, Bahrain, Lebanon and Morocco. Morocco is being particularly active and has agreements with UNESCO and Korea to support this work.

In our regional policy forums we found no consensus on the restrictions that should be applied to open licensing. A majority of countries are relaxed about the commercial use of OER but a minority are opposed.

The Paris Declaration

The final step in bringing a draft Declaration to the World OER Congress was a meeting of the International Advisory and Liaison Group (IALG), which reviewed and refined the draft that had resulted from the six regional policy forums. The draft Declaration followed three general principles.

- First, the Declaration is at the level of principles and aims rather than the detail of their implementation, which will vary widely by country.

- Second, it is focused tightly on OER rather than including the other aspects of openness, notably open source software and open access to research literature.

- Third, the Declaration avoids technical language.

The most important revision introduced by the IALG concerned the status of the World OER Congress. In UNESCO terms, it was a Category IV meeting, at expert level. Such meetings usually include both experts and government representatives but are not governmental meetings. The participants at Category IV meetings are considered to be there in a personal capacity. The practical consequence was that the Declaration continues to make a call for

Box 2

Comment by Professor Asha Kanwar, COL President[2]

Why is COL interested in promoting OER? When COL was first established, its fundamental goal was that 'any learner anywhere in the Commonwealth shall be able to study any distance teaching programme available from any bona fide college or university in the Commonwealth'. This was visionary at the time and is now beginning to bear fresh fruit as OER.

The OER movement is a people's movement, founded on principles that challenge the organisational values and pedagogical practices of many educational institutions that still represent closed systems. The principles of openness, sharing and collaboration that characterise the OER movement are different from centralised and closed education models based on elitism and exclusion. The OER movement is an important milestone in democratising education for the 21st century.

However, if we must harness the potential of this movement, OER cannot be viewed in isolation as mere technocratic products or forms of technology that are neutral and value free. As Manuel Castells (2009: 50)[3] put it:

'... there is a fundamental form of exercising power that is common to all networks; exclusion from the network … However, because the key strategic networks are global, there is one form of exclusion – thus, of power – that is pervasive … to include everything valuable in the global while excluding the devalued local.'

We need to place OER in the socio-political context in which they exist. Democracy, governance, the status of teachers and culture are important determinants in the uptake of OER.

An alliance of international development organisations can make such global research more effective in terms of delivering value for money. Policy-makers need to know how OER adaptation brings the costs down in the delivery of learning services to a much larger constituency. There are several models available already, but research is needed to demonstrate clearly the options available.

The OER movement can help transform education, particularly in the developing world, by:

- Involving all stakeholders to participate, collaborate, create and share educational resources.

- Encouraging consumers to become the producers of knowledge. Traditionally knowledge has flowed from industrialised to developing countries, from speakers of dominant languages to those who speak indigenous languages and from teachers to students. The OER movement by providing the opportunity to reuse, adopt and adapt materials can help change this trend.

- Harnessing the wealth of local knowledge across the globe to address the great development challenges of our time. COL's Lifelong Learning for Farmers initiative is an example through which peer learning takes place in local languages.

Open licensing as an approach to foster the spread of global public goods is here to stay. Extending copyrights for wider use without compromising the moral and intellectual rights of the creators is a sensitive task that has to be relevant to specific contexts. Creative Commons appears to be the most significant licensing framework but licensing options can vary in different countries, and international development organisations can forge partnerships to develop workable solutions for the OER community. The discussions at the regional policy forums have tended to position open licensing as an extension of author ownership of intellectual property rather than antithetical to it. This is an important development for policy-makers who can be assured that the public ownership of OER will in no way diminish the individual's rights.

COL will continue its partnership with UNESCO and other like-minded organisations to focus on three areas:

1. Advocacy and awareness-generation regarding the benefits and availability of OER.

2. Policy development on OER at the national and institutional levels.

3. Capacity-building so that more governments, institutions and individuals are able to effectively harness the potential of OER.

action by governments, rather than having legal force for governments. Although Declarations from Category IV meetings are not legally binding, experience with similar declarations in the past shows that governments often use them as guidance for their policy-making at country level.

Endnotes

1 Adapted from remarks at the World OER Congress (also with Stamenka Uvali_-Trumbi_); and the May 2012 Project Update on *Fostering Governmental Support for Open Educational Resources Internationally* to the International Advisory and Liaison Group (IALG), 2nd Meeting, Paris.

2 From remarks at the World OER Congress (prepared with Dr K Balasubramanian and Dr V Balaji, COL).

3 M. Castellis (2009), *Communication Power*, Oxford: Oxford University Press.

Sir John Daniel directed *Fostering Governmental Support for Open Educational Resources Internationally* and is a former President of the Commonwealth of Learning (2004–2012). He is now working on a variety of international projects, notably as Education Master in the Beijing DeTao Masters Academy, China, and Chair of the United World Colleges (UWC) International Board. He has previously worked with the UK Open University (Vice-Chancellor, 1990–2001) and UNESCO (Assistant Director-General for Education, 2001–2004) among many others. He was knighted for services to higher education in 1994, holds 31 honorary doctorates from universities in 17 countries and was awarded the Symons Medal of the Association of Commonwealth Universities.