

Fostering Governmental Support for Open Educational Resources Internationally



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Introduction

Colleagues:

We are pleased to have this opportunity to report on project “*Fostering Governmental Support for Open Educational Resources Internationally*” which is being implemented by the Commonwealth of Learning and UNESCO with support from the William and Flora Hewlett Foundation.

In these three inter-linked talks I shall present the rationale for the project, Sir John Daniel will update you on the story so far, and then Zeynep Varoglu will tell you about preparations for the World OER Congress in Paris this June which will be the culmination of our efforts.

Background

We start with the background.

The story we are telling goes back ten years ago when UNESCO organised a Forum on the Impact of OCW in higher education for developing countries at which the term OER was coined!

Ten years later, some of the key participants at that 2002 Forum are here today, still dealing with OER! I refer to Cathy Casserly, then a consultant with WFHF, Sally Johnstone, then representing WCET and Susan D’Antoni of IIEP. Zeynep Varoglu and I represented the ED Sector of UNESCO, which was then headed by Sir John.

UNESCO remained involved in OER and seven years later, in 2009, it held a World Conference on Higher Education of which I had the honour to be the Executive Secretary.

The conference brought together close to 2,000 participants representing higher education worldwide and its Communiqué it urged governments to give more attention to the roles of ICT and OER.

There was a general feeling at the time that, despite all the enthusiasm and idealism in the OER movement, its impact remained limited to the grassroots level. In 2009 it was easy to get the impression that the Open Educational Resources community had become, paradoxically, a somewhat closed group of enthusiastic producers of OER with much less attention to their crucial value, which is their re-use, adaptation and re-purposing.

For those who were there, one of the memorable moments of the 2009 Conference was a robust exchange about Open Educational Resources between two South Africans. Professor Brenda Gourley, then Vice-Chancellor of the UK Open University, 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. This was one occasion when flagging a potential problem early may have helped the world to avoid it.

Following the discussions of OER at the World Conference on Higher Education, later that year a resolution was presented at UNESCO's General Conference, requesting it to promote OER further, and arguing that the time was now ripe to bring OER to the attention of politicians.

UNESCO and COL took up this challenge with a project called *Taking OER Beyond the OER Community: Policy and Capacity for Developing Countries*, led by UNESCO's Zeynep Varoglu and COL's Trudi van Wyk. It was funded by COL and UNESCO with a contribution of \$50,000 from the US Delegation to UNESCO.

The project took us through 2010 and 2011 and achieved some useful outcomes.

We held nine workshops on OER for education leaders in Africa and Asia along with three online forums and a policy forum in Paris. Taken together these workshops reached hundreds of decision makers from many countries, most of whom previously had only a vague idea of OER and their potential.

Following the advice from those meetings UNESCO and COL produced two documents late last year which you can download from the websites: *A Basic Guide to OER* and *Guidelines for OER in Higher Education*.

All this laid the foundations for the current project.

This Project

Last summer the Hewlett Foundation offered COL a grant to team up with UNESCO in order to foster more support for OER among governments. This reflected a growing belief that OER would not enter the educational mainstream unless governments were made more aware of their potential and established policies to support their development, use and adaptation.

This is why the project is called *Fostering Governmental Support for OER Internationally*.

Elements of the Project

The project has three interlinked activities.

First is a survey of governments about their policies or intentions regarding OER.

Second, we are conducting a series of six policy forums for governments in all UNESCO regions.

Third is the World OER Congress in June, which Zeynep Varoglu will talk about in a moment. An important aim of the Congress will be the debate and approval by governments of a Paris Declaration about OER.

Before we get to that let us update you on the survey and the regional policy forums.

The Survey

A survey of all the governments is being conducted collaboratively by COL and UNESCO to find out whether they already have, or intend to develop, policies on OER. All the world's governments, including the provinces and states of some federal countries, have received survey questionnaires from COL or UNESCO or both.

To date we have received replies to the Survey from over 100 jurisdictions in all regions of the world. The responses are being analysed in South Africa and a report will be presented to the World OER Congress in June.

We are most grateful to members of the non-governmental OER community, especially those in the Creative Commons network who encouraged their governments to reply.

Regional Policy Forums

The second activity is a series of Regional Policy Forums on OER for governments in all UNESCO regions. The rationale for these gatherings is that questionnaire surveys have their limits and that there is so little knowledge of OER among governments that face-to-face discussions between government officials with practitioners can help to raise awareness.

This assumption of limited awareness of OER in governments has been confirmed in the three forums that we have held so far.

A forum for the Anglophone Caribbean was held in Barbados in January. This was part of wider meeting ICTs in Education but it did allow senior government officials a chance to review the first draft of the Declaration on OER that will be presented to the World OER Congress in Paris in June and the meeting inspired several more countries to send in their survey questionnaires!

In February we held a two-day forum for Africa in Pretoria. This gave us a change to profile some of the very exciting OER developments in Africa, which indicate that the fears of cultural neocolonialism articulated by Barney Pityana three years ago are not the reality. OER in Africa are alive and well. A junior minister from Kenya even suggested the creation of OER units in Ministries!

Two weeks ago we held a forum in Rio de Janeiro for Latin America, where comments from governments led us to produce a new draft of the Paris Declaration. Governments and civil society interacted well. Indeed, the Creative Commons representative from Guatemala met her Minister of Education for the first time in Rio!

This Rio version of the Declaration will be further refined at the Policy Forum for UNESCO's Europe region next week. This region includes Canada, Israel and the US and the Forum will take place within the OpenCourseWare conference being held in Cambridge UK. Later in April we shall hold a forum for the Asia-Pacific Region in Bangkok and, finally, one for the Arab States in Oman in early May.

Sir John Daniel

This is not the place for us to give you a detailed account of the responses received to the survey so far and the inputs of the regional forums but let us try to give you the flavour.

Caribbean

Our first policy forum was in the Caribbean. When it convened only The Bahamas, Grenada, St. Vincent & The Grenadines and Trinidad & Tobago had return the questionnaire but most other countries have since responded. The meeting was primarily about introducing ICTs in schools and the assembled officials – mostly permanent secretaries, the most senior Ministry of Education officials in these countries – were very impressed by an example of the use of OER in producing materials for teacher training.

In developing learning materials for teachers about using ICTs in the classroom, the Cyril Potter College of Education in Guyana had found that by taking existing OER from a variety of sources and adapting them to Guyanese needs they greatly reduced both the cost and the time required to offer good materials to the teachers. Moreover the College faculty had found their engagement with OER a very satisfying professional activity.

This concrete and successful example of the local use of OER helped the participants to see OER less as an abstract concept and more as a practical benefit. The participants considered that OER are potentially a transformative development for education. They emphasised that designing one's own content and being part of the knowledge creation process was extremely important.

These Caribbean officials were concerned about how to foster regional collaboration, particularly among teachers, and to ensure multidirectional flows of OER in and out of the Caribbean. They hoped that the Caribbean region could to speak with one voice about OER through the Council of Ministers of CARICOM, the Caribbean Community.

Africa

In the case of Africa replies from 17 countries showed that although none, with the exception of South Africa, have 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 ICTs in education or with the development of open and distance learning, or both.

In South Africa a policy decision to share OER under the Creative Commons Licence is already included in its Integrated Strategic Planning Framework for Teacher Education Development.

Most of the countries perceive the benefits of OER because of the flexible learning opportunities they offer and their cost-efficiency.

Major obstacles to their use are copyright, sustainability and above all connectivity constraints (the latter even in the case of South Africa).

Two countries (Mozambique and Niger) reported that participation in the OER movement was constrained by language and connectivity but expressed interest in becoming more active because of a growing need for quality educational resources both for students and teachers.

A common desire in the replies was for the countries, cultures and languages of the region to be part of the knowledge production process. Developing countries take this very seriously.

Latin America

By the time of the Latin America forum in Rio two weeks ago we had received replies to the survey from eleven countries in the region from Argentina to Mexico. The Government of Brazil, in particular, had done a very thorough job of commenting on the draft Paris Declaration.

Seven of the countries reported some strategy or policy related to OER, often based on government portals of educational materials that offer teachers access to OER. However, following presentations, we realised that very few were actually OER in the sense of having explicit open licences.

Some governments have a wider range of policies that extend to ICTs and Open and Distance Learning, which may or may not include OER. Generally the use of ICTs is perceived as offering more equal opportunities in education.

Some of the replies mention the use of open licences such as Creative Commons, but this was less common. Indeed, governments at the Latin American forum urged us to include less jargon and simpler concepts in the next draft of the Paris Declaration, which we have tried to do.

Most of the countries perceive the benefits of OER because of the flexible learning opportunities they offer, their cost-efficiency and providing equity of access to educational opportunities.

Major obstacles to their use were cited as copyright (in Chile and Paraguay) sustainability and in some cases connectivity. Interestingly, while Guatemala sees language and cultural diversity as an obstacle to the development of OER, Chile considers that a common language and similar cultural backgrounds in Latin America are an asset for OER sharing and development in the future.

A specificity of replies provided in this region is that there seems to be extensive public funding for learning materials. Another feature is that OER are in greater use in secondary or even primary level education than in tertiary.

The Declaration

As we noted, governments at the Regional Policy Forum in Rio de Janeiro improved the draft Paris Declaration in the direction of simpler language and clearer concepts. You can review the new version on the COL website at:

<http://oercongress.weebly.com/paris-declaration.html>

And on the UNESCO site at:

www.unesco.org/webworld/en/oer

The project's International Advisory and Liaison Group will meet in mid-May to put the finishing touches to the draft Declaration that will be presented at the June Congress.

This Group is made up of government representatives from all UNESCO regions plus some key IGOs and NGOs such as the OECD, WIPO, Creative Commons and OER Africa.

The aim of the Declaration is to get greater buy-in from governments to the promotion of OER and of open licences generally. Government backing for open licensing of public educational materials is essential if we are to make OER the normal way of doing business instead of a marginal, donor-driven phenomenon.

However, throughout our regional policy forums we have found that governments generally have little understanding of the notion of open licences. They often simply declare that materials on government portals are 'freely available', which is not really sufficient, especially for potential users outside the country.

We recall that Larry Lessig, wrote in "Free Culture" in 2004: "This movement must begin in the streets... Once this movement has effect in the streets, it has some hope of having effect in Washington." And later: "We have a long way to go before the politicians will listen to these ideas and implement these reforms. But that also means we have time to build awareness around the changes that we need."

We believe that since Lessig wrote those words the growth of the OER movement and our earlier project of taking OER beyond the OER community have indeed built 'awareness around the changes that we need'. So now is the time to tackle governments directly.

We hope that this joint UNESCO – COL project will support you in getting the concept of open availability of materials into the mainstream of education.

Thank you.