

OER for Inclusive and Equitable Quality Education: From Commitment to Action



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Professor Asha Kanwar
President & CEO, Commonwealth of Learning (COL)

What started in August last year at the COL headquarters in Vancouver is coming to a successful close today. This presentation on ‘OER for Inclusive quality education: from commitment to action’ is a snapshot of the entire process and its outcomes.

This journey would not have been possible without the strong support from Indrajit, David Atchoarena, Zeynep, Fengchun and Joe from UNESCO; Gasper, Mitya, Davor and Matiya from our host country; Barbara Chow and TJ Bliss from Hewlett and staunch allies like Cable Green and David Porter.

I’ll first begin by giving you some background information, followed by a brief account of the six regional consultations on OER. I will then share some of the key findings of the two surveys, for governments and stakeholders that were completed within the framework of the 2nd World OER Congress and close with some trends and the way forward.

But first the background.

Five years ago COL and UNESCO organised the first World OER Congress that resulted in the Paris OER Declaration. Sir John Daniel, the former President & CEO of COL led the process and we are fortunate that he is here today to see that the torch he lit then continues to burn bright today.

The road to Ljubljana has passed through six regions of the globe. The first consultation for Asia was held in Kuala Lumpur in December with our partner AsiaeUniversity; followed in quick succession by the meetings for Europe held in Malta and hosted by the Minister of Education and Employment, the Hon Evarist Bartolo. The MENA region consultation was generously supported by Reach Out to Asia (ROTA) in Qatar. The Minister for Education the Hon Leeladevi Dookhun Loochoomun hosted the regional consultation for Africa in Mauritius. Stakeholders in Latin America and the Caribbean met in Brazil where the University of Campinas was our partner. The sixth and final regional consultation for the Pacific was co-hosted with our long-term ally the Open Polytechnic of New Zealand. All these consultations were completed within six months. Despite this tight schedule and limited resources, our objective was to include as many governments and stakeholders as possible and to enlarge the existing circle.

A background paper for the regional consultations was developed by the Task Force and approved by the project Steering Committee with members from UNESCO, Slovenia, Hewlett and COL.

In 2012, our main objective was to foster governmental support for OER internationally. Today we want to involve many more stakeholders so that OER can be mainstreamed and implemented at all levels. Five years ago, the focus was on promoting policy development but as we know, that is not enough--we need strategies for implementing policies. At that time, the primary objective was to seek governmental commitment. This time we are moving beyond commitment to concrete action for achieving the education and training goals of Member States.

Lets now look at the six regional consultations

The objectives of these consultations were one, to raise awareness about the importance of OER in achieving SDG4; two, identify strategies to address the barriers that prevent people from mainstreaming OER and three, identify concrete actions that different stakeholders need to undertake to optimise the use of OER. These are now being considered at this Congress.

The first regional consultation was held in Kuala Lumpur—48 participants from 20 Asian countries participated in this meeting, including Bhutan, Nepal, Myanmar and Mongolia.

Some of the highlights that emerged were that Bangladesh supplies free textbooks to its school students and are in the process of developing a national OER policy, with COL support. A major project of the Indian government —the National Mission on Education through ICTs uses the CC licence. Malaysia has committed to opencourseware in its elearning policy. There are OER repositories in India, Indonesia, Malaysia, Pakistan, Philippines, and Vietnam.

The Asian group raised concerns about poor connectivity, lack of capacity and unavailability of OER in local languages. They also flagged the need for more attention to developing OER for people with disabilities. While there are many emerging initiatives in Asia, there was no OER policy at the national level.

In Europe 64 participants from 24 countries engaged in the consultation, including four ministers.

While in Asia, most OER initiatives were government-led, in Europe, these were either institutional or project-based. OER were seen as part of a wider ecosystem of opening up education and open education practices. Advanced technologies were available for multi-lingual searches. There were many OER initiatives but these were mostly operating in isolation. The need for complementarity and collaboration was stressed.

Participants believed that there was a greater need for political will and national level policies to support the mainstreaming of OER. Teachers were identified as critical to this process. There was a discussion about involving publishers and rethinking business models. The need for quality assurance was also stressed.

In the Middle East and North Africa region, 37 participants from 13 countries deliberated on the status and strategy for OER.

The MENA region is bound by a common language Arabic. On the one hand, there were national OER policies in Oman and Bahrain; institutional OER initiatives in Sudan, Morocco, Jordan but on the other participants from Djibouti and Mauritania were new to the field. There are several initiatives to translate existing OER into Arabic but the point would be to lead in producing fresh content in Arabic.

The main needs identified were more advocacy, capacity-building, national and institutional level policy development and closer regional cooperation.

Forty six participants from 23 African countries shared their knowledge and expertise at the regional consultation in Port Louis.

South Africa and Seychelles have national policies while the open universities of Nigeria and Tanzania have institutional policies. Siyavula, a prominent private initiative in South Africa has created a new business model under which the content is free but the services require payment.

Lack of electricity and connectivity were identified as major barriers. There was a great deal of discussion on the lack of OER in local languages and suitability for specific cultural contexts. The African representatives wanted more policies at the national and institutional levels.

The meeting for Latin America and the Caribbean attracted 31 participants from 18 countries.

There is an OER policy at the national level in Antigua & Barbuda. Institutional policies for open access are in place in Brazil and Chile; there is a strong commitment to OER at the city level, notably in Sao Paulo. Overall there was a general awareness and willingness to pursue OER in several other countries driven by a rights perspective.

There was concern over the dominance of English and a call to develop more OER in Portuguese and Spanish. Lack of national policies, capacity to use OER and poor connectivity were issues shared with other regions. The need for more accessible content for people with disabilities also came up. This will have to be addressed if we are to be more inclusive and harness OER for sustainable development.

The Pacific regional consultation was attended by 23 participants from 7 countries, including the Minister of Education, the Hon David Collins, who has offered to be a champion of OER in the region.

Australia and New Zealand have open licensing frameworks for publicly funded content; Fiji has developed a national OER policy, and several institutions including the National University of Samoa, and the Solomon Islands National University are offering OER based courses. Kiribati and Vanuatu are using OER for the school sector through COL support. OERu has a valuable regional and international footprint.

Interestingly there was a call to link the OER policy to the regional Pacific Education Strategy. The need for better infrastructure and connectivity was something in common with the other developing countries. There was a fair bit of emphasis on promoting indigenous knowledge and culture. OER was also seen as a people's movement that would help support freedom, dignity and human rights.

Based on the key issues, participants in all the regional meetings identified nine types of stakeholders: governments, educational institutions, teachers, learners, librarians, QA agencies, publishers, civil society and associations. They suggested the actions that each group needs to take so that OER can contribute to inclusive and equitable quality education. These actions then fed into the online consultation on the outcome document led by UNESCO.

The regional consultations were a great success and brought together ministers, government officials, experts and practitioners. 257 stakeholders from 109 countries participated. We find a greater commitment by governments to support OER and adopt national policies. Governments are also allocating resources to support specific projects. The emphasis was still on OER development rather than use. All regions want more collaboration. These consultations not only helped generate momentum for the 2nd World OER Congress but also created a better understanding and awareness of OER. Matiya very diligently recorded the events and interviewed numerous participants thereby creating a valuable resource for the community.

Let us now turn to the two surveys.

There was a government survey sent out to Member States by COL and UNESCO. The other was a stakeholder survey that was placed online and publicised through social media.

We received 102 responses from governments. The maximum came from Africa and Asia and the Pacific followed by Europe and North America.

Key findings suggest that 56 of the 102 respondents believe that there are OER policies in their countries. 34 respondents believed that there was an OER policy at the national level, which does not necessarily add up to the reality.

More than 50% felt that they were considering policy development at the national level. Clearly all the respondents do not share the same understanding of what an OER policy is and this is an area where more needs to be done.

In response to the question on the kind of OER activities, the majority stated that these were project-based, followed by institutional and governmental initiatives.

Officials believed that OER can increase efficiencies and enhance the quality of resources and provide more flexible learning opportunities for enhanced access.

Barriers to the use of OER included: lack of capacity, insufficient access to quality content, and lack of appropriate policies. Officials also believed that we needed more credible business models for convincing ministers and publishers. Language continues to be a barrier to reaching the unreached.

We received 638 completed responses from stakeholders. The maximum responses received were from Asia and the Pacific followed by Europe and North America and then Africa. There were 57% male and 42% female respondents.

What do we know about the respondents? 49% had over 20 years' experience and the majority of respondents came from teaching, followed by administration and management and research. How can we enlarge and diversify the circle to include younger professionals and grassroots workers?

Where did the majority of stakeholders come from? 60% were from colleges and universities—how do we involve the other sectors of education, especially teachers in remote rural schools? If OER are to contribute to SDG4 which aspires to provide lifelong learning for all, then they must be mainstreamed along the entire spectrum of education—primary, secondary and tertiary as well as non-formal learning. 93% of the respondents were aware of OER. Are we only reaching out to the converted?

That said, it was surprising to note that there was scant awareness of some of the well-known international and national repositories. MIT OCW was the best known and used.

The stakeholders believed that using OER would reduce costs and improve the quality of learning. OER were also seen as improving the quality of teacher training and saving their time.

The barriers identified by stakeholders were lack of policy, lack of capacity and lack of quality content. COL had been recently requested to help Mozambique with the development of OER for secondary schools. Since we had already developed OER for secondary schools in 20 subjects in Africa and the Caribbean, we looked into the possibility of adopting and adapting content in physics, chemistry and biology and discovered that substantial localisation and supplementation was required.

Both groups—governments and stakeholders agree that OER increase access to quality materials. Similarly, both groups were concerned about lack of policies, insufficient capacity and changing business models.

Where did the governments and stakeholders differ in their priorities? Governments stressed the need for more attention to indigenous languages, culture-specific content and costs. Stakeholders focused on the opportunity for saving time for teachers and quality improvement.

The OER Global Report 2017 that we have prepared for you is based on the findings of the surveys, the outcomes of the regional consultations and very significant communications received from key stakeholders in the field. You will find it a rich resource of data, trends and actual practice.

How does all this add up to the bigger picture, that is, the theme of the Congress? What are the global trends that have emerged and what are the actions needed to provide more inclusive and equitable quality education for all?

As we have seen there has been considerable progress since 2012. There are more OER policies especially at the institutional level. Governments are supportive but this does not always translate into explicit policies. However, the OER activities are still thriving even without the overarching policies. You'll be pleased to note that one positive outcome of the African regional consultation in March this year was that Nigeria has developed and validated a national OER policy through extensive consultations.

Even though there is low awareness, there are many more repositories today than there were five years ago. Most repositories are at the tertiary level and those from the global north are more likely to be used. Limited use of these repositories suggests that they must be more widely publicised and user-friendly. If you build it, they will not necessarily come!

More people are aware of the benefits of OER and the circle of champions and advocates has certainly grown. However, the meaning of 'open' means different things to different people. Even as more governments are offering MOOCs, these are not always open. While there is a growing recognition for promoting open textbooks, there needs to be more emphasis on learning resources for lifelong learning.

But OER have not been adopted at the speed and scale envisaged in 2012. What can we do accelerate the process? There is a huge opportunity for both COL and UNESCO to help Member States to take full advantage of the OER movement to effect the paradigm shift required to achieve the targets of SDG 4. We can continue with evidence-based advocacy, capacity building and support for policy development. One key recommendation relates to the development of a normative instrument which could help governments to harness the potential of OER for achieving SDG 4.

Stakeholders recommended that better communication strategies are required to share the findings of OER research, which has doubled since 2012. New business models would need to be explored. Further innovations are needed to bridge the digital divide. Monitoring of progress will be required to measure impact. These seven recommendations have emerged from the regional consultations and the two surveys and are highlighted for further discussion in the lead up to the Ljubljana OER Action Plan.

Finally, let me thank my colleagues who in addition to their demanding day jobs, toiled tirelessly to making these events a success and for continuing to be real champions of OER around the world.