Publishing with Public Money for Public Benefit

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Introduction

Thank you for inviting me to give the opening address at this Open Education Event in Open Access Week.

In 1972 I spent three months as an unpaid lecturer at the UK Open University to fulfil the internship requirements for the Master's Programme in Educational Technology at Sir George Williams University. I'm a slow learner and it took me 25 years, until 1996, to complete the degree, by which time Sir George had become Concordia.

But that internship was the transforming moment of the programme. You could say that I had a conversion on the road to Milton Keynes. Everything about the infant Open University, then only two years old but already with a student body of 40,000, was thrilling. I was captivated by the idealism, the commitment to students, the scale and the use of technology. I came back to Canada no longer at ease in the old dispensation of higher education.

The Open University's mission statement, to be open as to people, open as to places, open as to methods and open as to ideas, defined the framework of higher education in which I wanted to work.

Very fortunately I had an opportunity almost immediately to trade my conventional faculty post at the Ecole Polytechnique of the Université de Montréal for the third appointment made by the Télé-université of the Université du Québec, then starting up in Quebec City.

Ever since that revelation of a revolution in higher education that came to me that summer at the Open University in 1972 I have had a weakness for any proposition that attaches the word 'open' to education.

Let me first pay tribute to the splendid work of BCcampus. The Commonwealth of Learning considers itself extremely lucky to have BCcampus as a near neighbour. I am delighted how collaboration between us has developed since Dr Venkataraman Balaji joined COL as Director of Technology and Knowledge

Management. We try to take some of your ideas to the wider public that we serve in the developing world.

At present, for example, Paul Stacey's idea of 'The University Open' is a staple of many of my speeches and I have been busy promoting the concept of the Open Educational Resources University which is an attempt to operationalize it. I think I can claim responsibility for getting three universities, two in India and one in the US, to join the consortium that is getting the OERU on the road.

This morning I shall start with the elements of the 'The University Open', note the specific meaning that open access has acquired and make some comparisons between how we approach research and how we approach teaching.

This will lead me to explore the concept of open educational resources and the simple idea that educationally useful material created with public money should be made openly available to the public.

That's why I have called this talk *Publishing with Public Money for Public Benefit.*

I do not need to promote that idea to this audience. However, in 2009 both the UNESCO World Conference on Higher Education and UNESCO's General Conference concluded that while open educational resources had great potential, too little was known about them outside the networks of cognoscenti and aficionados like you.

COL therefore teamed up with UNESCO in a project called *Taking OER Beyond the OER Community: Policy and Capacity for Developing Countries.* I shall describe the elements of that initiative, which continues.

Indeed, it is now evolving naturally into a wider project, for which the William and Flora Hewlett Foundation offered us funds without our even asking for them, called *Fostering Governmental Support for Open Educational Resources Internationally,* which I shall also outline.

That project will lead up to the *2012 World Open Educational Resources Congress* that will take place at UNESCO HQ in Paris next June.

This means that 2011-2012 will be an important year for getting both the idea and the reality of OER into the mainstream of education and learning – and I invite you to redouble your efforts towards that goal.

Dimensions of Openness

I return, therefore, to Paul Stacey's concept of The University Open. His point is that the combination of open source software, open access publishing, open educational resources and the general trend to open government allows us to do new things.

Paul developed this concept as what he called 'The University Open' which has since mutated into the Open Educational Resource University that is being led by our former COL colleague Wayne Mackintosh at the Open Education Resource Foundation in New Zealand. This involves a growing number individuals

and institutions, and among them I single out Jim Taylor of the University of Southern Queensland who developed this slide to show how it would work.

I've found that you need to explore this universe of openness for a while before you realise that the seemingly very general term 'open access' usually refers only to open access to research publications. This is not a criticism, because the journal publishing industry has long been a particularly egregious example of making good money by appropriating other people's work. I commend the research community on eroding this monopoly both through open access journals and by insisting that copies of papers in proprietary publications can be made openly available in institutional repositories.

Today I shall focus on expanding the concept of open access to teaching materials for which, since researchers got to the term 'open access' first, we use the more cumbersome term 'open educational resources'.

Contrasting Approaches to Research and Teaching

But why, since higher education spends more effort on teaching than on research, are open educational resources coming late to the game? Let's reflect for a minute on the different ways that faculty approach research and teaching.

Consider the contrast between the way that academics conduct research and how they prepare for teaching. When we engage in research we assume that we will build on the research of others. We cite previous work as background to our own, or to apply it to a new situation, or sometimes to challenge it. We publish our research results so that others can scrutinise our work and build on it in their turn.

Contrast this to the way we prepare for teaching. We usually scan current scholarship to ensure that our teaching is up to date. However, apart from recommending textbooks, we rarely make much use of others' teaching materials, even if we could access them.

Furthermore, whereas we treat research as a public activity, until quite recently most academics considered teaching to be a private activity – except, of course, for the students present. Department heads were shy of attending their colleagues' lectures and academics took time to accept student evaluations of their teaching.

These attitudes began to change 20 years ago, thanks in part to the great American educationist, Ernie Boyer, and his book *Scholarship Reconsidered.* Starting from Aristotle's dictum that teaching is the highest form of understanding, Boyer insisted that knowing and learning are communal acts.

He distinguished four types of scholarship: the scholarship of discovery, which we usually call research; the scholarship of integration, that throws bridges between disciplines; the scholarship of application, that uses knowledge to solve real problems; and the scholarship of teaching – whose role, like research, is to transform and extend knowledge.

As a result of Boyer's work, the way that academics are evaluated for promotion and tenure has evolved – too slowly in my view – from an almost exclusive focus on published research towards a more holistic conception of their work.

I took part in this transition when I was vice-chancellor of the UK Open University in the 1990s. We developed a system whereby colleagues aspiring to be promoted to a Chair – i.e. to Full Professor – had to show excellence in two of the three functions of research, teaching and service to the academic community.

How do OER fit into this evolutionary process? I return to the statements that teaching is the highest form of understanding and that knowing and learning are communal acts.

In this spirit I suggest that OER are entirely consistent with the best of our academic traditions. Let's shoot down the idea that using OER is just a fancy form of plagiarism – an opportunity for academics to use others' teaching materials because they cannot be bothered to prepare their own.

Open Educational Resources

Open Educational Resources place teaching in the public domain. OER can be developed by individuals – what our Vancouver colleague Professor Tony Bates calls the 'Lone Ranger' approach – but often they are developed by teachers working as a community.

I think of the OER on the UK Open University's *OpenLearn* website, which derive from courses developed by teams. The Virtual University of Small States of the Commonwealth is an extreme international example. It is a collaborative mechanism through which academics from up to twenty countries work together online to develop teaching and learning materials for a particular course as OER, which are then adapted and used by all to support both classroom teaching and distance learning.

The possibility of sharing teaching and learning materials has long been hailed as an advantage of distance education. Until recently, however, such sharing has encountered three obstacles which OER now surmount.

First, institutions and their academic staff are prone to the 'not invented here' and the 'not invented by me' syndromes. The temptations of the rich resources of the Internet, Google and social software are steadily curing that syndrome.

Second, until academic world went digital sharing materials was tiresome. They always needed adaptation, and that meant re-keying large amounts of text and changing illustrations.

Third, intellectual property rights were a nightmare. Copyrighted material was often buried in learning materials that claimed to be free of restrictions, and a conscientious institution had to proceed very circumspectly.

OER are now removing the last two of these obstacles. First, they are almost invariably developed in digital format even if, in Africa for instance, they often reach students in the form of print. That makes them easy to change and adapt.

Second, the various licences under which OER are shared mean that you can proceed with confidence both to develop and use OER.

My final comment is that OER can facilitate intellectual exchanges that are genuinely multi-directional and multi-national.

At the session on OER at the 2009 World Conference on Higher Education, the Vice-Chancellor of the University of South Africa, Professor Barney Pityana, crossed swords with his fellow South African Brenda Gourley, who was then Vice-Chancellor of the UK Open University. Barney Pityana argued that OER would promote a form of intellectual neo-colonialism whereby the rich north rams its OER down the throats of the poorer south.

That does not have to happen – indeed, it is not happening. COL is a partner in a programme for Teacher Education in Sub-Saharan Africa, known as TESSA, through which thirteen African universities are working together to produce and use OER for in-service teacher education. Last year 320,000 African teachers in ten countries adapted and used these OER, which are available in Arabic, English, French and Kiswahili.

All that is fine and 320,000 is a lot of teachers, but the fact remains that the production and use of OER has not yet entered bloodstream of education generally. Too often the production and re-purposing of OER takes place in a project framework dependent on external funds.

The William and Flora Hewlett Foundation has been a great funder of OER and I pay tribute to its work, from which COL has benefited greatly. Nevertheless, Hewlett's aim is to make OER a sustainable and normal part of educational ecosystems.

For that to happen OER need to feature in governmental and institutional policies, a challenge that COL took up with UNESCO two years ago after the 2009 UNESCO General Conference.

Taking OER Beyond the OER Community

This was the genesis of our project *Taking OER beyond the OER Community: Policy and Capacity for Developing Countries.*

We began with a workshop at the conference of Executive Heads held by the Association of Commonwealth universities in Cape Town last year. Shortly afterwards we did a similar workshop with senior people from national quality assurance agencies for higher education at the conference of the International Network of Quality Assurance Agencies in Higher Education that was held in Windhoek in neighbouring Namibia.

Following those we held a Francophone event in Bamako, Mali and then at COL's Pan-Commonwealth Forum on Open Learning in Kochi, India at the end of last year.

This year there have been workshops in Mozambique and Tanzania. Ten days ago we did one at the conference of the Asian Association of Open Universities in Penang, Malaysia.

After the first four workshops we held a policy forum for governments on OER at UNESCO Headquarters in Paris and as a result we prepared two documents to support the next stage of the campaign.

The first is a *Basic Guide to OER* written by South Africa's Neil Butcher under the editorial guidance of Professor Asha Kanwar and Stamenka Uvalić-Trumbić. You can download it from COL's website.

The second document is *Guidelines for OER in Higher Education.* They were drafted by Zeynep Varoglu of UNESCO and Trudi van Wyk of COL with the aid of an international committee. Since then they have been the subject of an online consultation. Some of you may have taken part and I thank you for your contribution to this work.

They are now being printed and I shall launch them with the Director General of UNESCO, Ms Irina Bokova, at the UNESCO General Conference on November 1st.

Fostering Governmental Support for OER

In the next phase of the project, for which we have been offered support by the William and Flora Hewlett Foundation, we shall foster government support for OER internationally.

This will involve questioning governments about their policies and intentions in relation to OER and open licensing. The result will be an inventory of current practices and policies with respect to open access to educational material that we shall share widely.

This process will lead into the drafting of a statement on open access for the World Conference on OER that UNESCO is hosting in June 2012. We hope that governments will commit themselves to the principle that when educationally useful material is developed with public funds it should be made available under an open licence.

UNESCO's Member States expect opportunities for involvement in the drafting of statements presented to them for adoption. For this purpose are putting together an International Advisory and Liaison Committee, made up mostly of governmental representatives chosen through UNESCO's processes, but also including representatives of other organisations such as Creative Commons, WIPO, the OECD and OERAfrica.

We hope that the statement will at least promote the principle that publishing with public money should be for public benefit. We shall not argue that governments should get deeper into the publishing business, simply that if public funds do support a publication it should be made available under an open licence.

Those of you who follow the OER list-serve will have seen the recent lobbying by the US publishing industry against greater governmental involvement in publishing OER. How much governments should engage in educational publishing is a political question, but the principle that material should be openly licensed if public money is used should not be controversial.

Similarly I doubt that the statement will propose particular forms of open licensing.

Creative Commons is doing a great job and now has a presence in fifty countries. However, some countries still regard it as an American NGO. Furthermore there is still some more work to be done in creating appropriate open licences. Rather ironically, there is not yet an open licence that is appropriate

for inter-governmental organisations such as UNESCO and COL, although Creative Commons promises one by early next year.

Our principal consultant for this project is Stamenka Uvalić-Trumbić, who has recently retired as Head of Higher Education at UNESCO. She edited, with Professor Asha Kanwar, the *Basic Guide to OER* that I just mentioned, and she was Executive Secretary of UNESCO's 2009 World Conference on Higher Education that flagged the importance OER.

Earlier she led the project to get governments to agree on *Guidelines for Quality Provision in Cross-Border Higher Education,* which required similar processes of consultation, negotiation and collaboration with the OECD to those that will be required for drafting a statement that governments can agree to.

The OECD is also promoting OER and, since developing countries are sometimes suspicious of OECD initiatives, we must create an inclusive process for drafting the Paris statement, preferably one that involves regional as well as global events and repeats the successful collaboration that UNESCO had with the OECD. Hewlett's support will help to strengthen that process.

Conclusion

In conclusion, we believe that this joint UNESCO – Commonwealth of Learning project, linked to the OECD work, has the potential to get the concept of open access to materials more fully into the bloodstream of education and we hope you will support it.

The Commonwealth of Learning and UNESCO believe that knowledge is the common wealth of humankind.

Heads of Government set up the Commonwealth of Learning two decades ago because they believed that information and communications technology (ICTs) could help to equalise the distribution of high quality educational opportunities. OER are an important development in that direction. We have long hailed the possibility of sharing ODL materials between institutions. With OER that possibility becomes a reality.

We are very much looking forward to next June's World Conference on Open Educational Resources and hope that you will all support this joint effort of UNESCO, the OECD and COL to bring OER thoroughly into the educational bloodstream.