

Fostering Governmental Support for Open Educational Resources Internationally



4th REGIONAL POLICY FORUM EUROPE

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Introduction

Representatives of the Governments of UNESCO's Europe Region, delegates to the OpenCourseWare conference, Sponsors, Ladies and Gentlemen,

It is a great pleasure to be here and to welcome you to the Regional Policy Forum for Europe that we are organising within our Project "Fostering Governmental Support for Open Educational Resources Internationally", which is being implemented by the Commonwealth of Learning and UNESCO. We are grateful to the OCW conference for letting us piggy-back this consultation on your meeting.

I have prepared this account of the project with our Senior Consultant, Stamenka Uvalić-Trumbić, who unfortunately cannot be here. First I will describe background to the project and its three elements. Second, I will give some highlights from the responses we have received from countries in this region to our survey questionnaire on OER policies. Third, I shall initiate a discussion with you on the current draft of the Declaration on OER that governments will be invited to support at the World OER Congress at Paris in June.

The focus of our project is fostering governmental support for OER. Here in the Europe region there are vibrant OER initiatives under way in a number of countries. However, if our experience in other regions is any guide, these initiatives would be more sustainable if the governments of the region had more proactive policies on OER.

Stamenka has done a first analysis of Europe Region governments' responses to our survey about OER policies and I will share that later. Globally we have received replies from over one hundred jurisdictions and they are being analysed in South Africa for presentation at the World OER Congress.

Background

Let me begin by setting the stage.

Three years ago UNESCO held a World Conference on Higher Education of which Stamenka was the Executive Secretary. For those who were present one of the memorable moments of the 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, the University of South Africa, asked if OER were not potentially a form of neo-colonialism, with the north pushing its intellectual products at the south.

I believe that this was one occasion when flagging a potential problem early helped the world to avoid it. At our Policy Forum on OER in Africa in February we found a vibrant culture of creation, re-use and re-purposing of OER.

Our host for the African meeting was none other than UNISA, which now has a proactive institutional strategy in favour of OER. And UNISA is not alone. The African Virtual University (AVU) has developed an Open Education Resources Portal launched in 2011 which makes available 219 open educational modules in three languages (largely in maths and sciences); developed collaboratively in 10 African countries and the resources have been downloaded by 142 countries, with significant downloads in Brazil and the USA.

The flow of OER is now 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.

The reason that we conducting this project and holding these Regional Policy Forums is simply that Open Educational Resources have great transformative potential for education at all levels. OER make a strong statement that education and knowledge are public goods and enable governments to maximise the benefits of their considerable investment in educational materials.

So let me recap the story so far. I take you back to 2002, when UNESCO began its involvement in OER. At the beginning of the century an important trend began to develop. In 2001, MIT announced its OpenCourseWare programme and began putting some of its course material free of charge on the web, an initiative that sounded too good to be true, coming from such an eminent institution.

As a consequence of the enthusiasm generated by MIT's OpenCourseWare project UNESCO organised a Forum on the Impact of Open Courseware for Higher Education in Developing Countries in Paris in July 2002. The Forum brought together major partners: MIT, the Hewlett Foundation, the Commonwealth of Learning (COL) and HEIs from the developed and developing worlds to explore this new approach to making teaching materials available and suggest how it might help developing countries to access knowledge and educational resources of quality.

This Forum was a major milestone for the OER movement. The term Open Educational Resources was coined at that meeting to mean educational materials that may be freely accessed, reused, modified and shared. The participants adopted a Declaration which expressed “their wish to develop together a universal educational resource for the whole of humanity, to be referred to henceforth as Open Educational Resources”.

This 2002 Forum on Open Courseware and OER stimulated a series of developments and created a global movement for the open licensing of educational and creative works. Through an internet discussion forum led by UNESCO’s Institute for Educational Planning (IIEP) in 2007, an OER community was developed bringing together some 500 individuals from 90 countries to chart the future of OER in education. In 2010 UNESCO’s Communication Sector developed this into the World Summit on the Information Society Platform OER Community, which now has upwards of 1,600 members.

Despite all the enthusiasm and idealism, however, the awareness of the OER movement was mostly limited to the grassroots level. The 2002 Forum at UNESCO, building as it did on the MIT OCW experience, focussed only on higher education. By 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.

I mentioned the 2009 UNESCO World Conference on Higher Education, which brought together close to 2,000 participants representing higher education worldwide. In its Communiqué the Conference urged governments to give more attention to the roles of ICT and OER. As a result, later that year a resolution was presented at UNESCO’s General Conference, requesting UNESCO to promote OER further, and arguing that the time was now ripe to bring OER to the attention of politicians.

Taking OER Beyond the OER Community

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. 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 and they are available to you: A Basic Guide to OER and Guidelines for OER in Higher Education. Both documents can be downloaded from the COL website.

All this laid the foundations for the next stage.

Fostering Governmental Support

The project has now evolved to focus primarily on governments. It is called Fostering Governmental Support for OER Internationally and is partially funded by a grant from the Hewlett Foundation.

Larry Lessig wrote in his book *Free Culture* in 2004: “This movement must begin in the streets. It must recruit a significant number of parents, teachers, librarians, creators, authors, musicians, filmmakers, scientists – all to tell this story in their own words...Once this movement has effect in the streets, it has some hope of having effect (on governments)” 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 are moving the focus to governments because we believe that since Lessig wrote those words we have, by our collective efforts in the Open Courseware movement, built ‘awareness around the changes that we need’.

The project has three interlinked activities.

Survey of governments

First is a survey of all the world’s governments, being conducted collaboratively by COL and UNESCO to find out whether they already have, or intend to develop, policies on OER. All the governments of the countries represented here will have received survey questionnaires from UNESCO and/or COL.

To date have received to date replies to the Survey from 17 countries in the Europe region as listed here and one from the USA is on its way. This is out of a possible total of just over 50 countries in the region. In some cases more than one reply was received, notably from Canada, where education is a provincial jurisdiction and 12 of the 13 provinces and territories have had the goodness to reply to us.

A few countries have sent in the replies they made to a survey on OER conducted by the OECD last year. This is very helpful since, ironically for a study on Open Educational Resources, the OECD will not let us cite the data from their survey!

We are most grateful to those who have already replied and invite governments who have not replied to do so. I shall give you the highlights from the European responses in a moment.

Regional policy forums

The second activity of the project is regional policy forums. The discussion here in Cambridge is the fourth of a series. We held a mini-forum in January in the Barbados for Caribbean countries and a Regional Policy Forum for Africa in February in Pretoria, South Africa. At the end of last month there was a similar meeting in Rio de Janeiro for Latin American countries.

Between now and June we will hold Regional Policy Forums on OER in the two remaining UNESCO regions: in Bangkok for the Asia-Pacific Region later this month and in Oman for the Arab States in May.

Paris Declaration

One focus for those meetings – and for the discussion here in a moment – will be the third activity, which is the drafting of a Declaration on OER that will be presented to the World OER Congress in Paris in June.

A very preliminary text was developed late last year after a meeting of the project's International Advisory and Liaison Group. In the Caribbean we did not have the opportunity to discuss the Outline Declaration in detail. However, after the Regional Policy Forum in Africa, a second version – Declaration v.2 was produced, incorporating specific African inputs. This was further revised following the Forum in Rio and you have this third version in your packages.

Following this meeting, based on your inputs here and in the next seven days, version 4 of the Declaration will be created and further developed at the two remaining regional forums. The International Advisory and Liaison Group will then make any further revisions before the draft Declaration is presented to governments at the June Congress. The IALG will also act as the Drafting Committee during the Congress.

Results from the Europe Region

Before I invite comments on the Declaration let me say a word about the responses to the survey from governments in the Europe Region.

I noted that we had received responses from 17 countries and one from the US is on its way. Another project is researching the status of OER within the US, where a growing number of states are legislating for OER as a way of cutting the spiralling cost of textbooks at both school and college levels.

I will start with Canada, where education is the responsibility of the 13 provinces and territories, 12 of which replied to our survey. None have OER policies in place but, as Quebec expressed it nicely, “it is more correct to speak about a culture of OER that is gradually setting in”. Quebec, Alberta, British Columbia and Ontario all have programmes to encourage the development of OER. The most ‘open’ example is British Columbia’s BCcampus, which is a thought leader in the OER movement globally.

Even BCcampus, however, began with a special Creative Commons licence aimed at limiting re-use of open resources to institutions within the province, although it has since loosened up. This is not yet the case in Alberta which cites two obstacles to a greater commitment to OER. The first is ‘integrity’, which means that school-level resources on the Web should be not be modified, because they represent the provincial curriculum. The second is a reluctance to share material outside Alberta, because Alberta taxpayers funded the resources for use within the province.

Ontario cites the difficulty of unwinding previous agreements with higher education institutions and third parties as an obstacle to a greater commitment to OER. It is proud of the 26,000 items in the Ontario Educational Resource Bank, but although these can be ‘searched, viewed, downloaded, and modified’ the site is password protected to limit access to students and teachers in Ontario.

In summary, all the Canadian jurisdictions are sympathetic to the OER movement and see participation in it as an expression of their growing commitment to online learning and digital resources. However, only British Columbia, through BCcampus, is showing leadership in the global OER movement.

I shall show in a moment that these Canadian perspectives on OER are similar to those found across much of the Europe region. They also resonate with the responses we got from Africa and Latin America. You could summarise it by saying that although there is a sincere desire to create and share digital resources, few countries have formalised it into an OER policy or initiated systems for the open licensing of educational material that clarify who may use it and how.

However, I regard the trends as promising and am encouraged by the experience of the research community, which got there before the rest of the educational world, and coined the term ‘open access’ to refer to open access to the results of research conducted with public funds. I commend to you a robust leader in this week’s edition of *The Economist*, which urges that governments and charities tighten the screws further in insisting on open publication of research that they have supported.

The article begins with the statement that, “publishing obscure academic journals is that rare thing in the media industry: a licence to print money”. Some governments are coming to the conclusion that publishing textbooks for their schools is a similar example of excessive rent seeking. With public resources in short supply this is leading them to support the creation of OER with policy and legislation.

Of the countries in western Europe that replied to our survey 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 when then have an obligation to share their OER products.

An example is the Wikiwijs programme in the Netherlands. In Hungary the Sulinet Digital Knowledge Base has attracted numerous awards and accolades. Finland has freely accessible national portal of educational materials.

I must also mention Poland, which just two weeks ago announced the creation of a complete set of free educational materials as OER for all 9 to 11-year old school children. Seen in the picture is Cable Green of Creative Commons who works closely with Creative Commons groups in many countries to bring such developments about. The small country of Slovenia has also made a big commitment, developing some €10 million worth of e-content since 2006 using Creative Commons licences.

The other countries in Western Europe are aware of the OER movement to a greater or lesser extent. Most of them are coming into contact with it through their policies of encouraging the creation and dissemination of digital versions of educational materials.

Austria, which is well advanced in making educational materials available under open licences, links this explicitly to the older campaign to make research results publicly available that I alluded to a moment ago.

The Paris Declaration

Let me conclude by briefing you about the Paris Declaration on OER.

The culmination of our project to alert governments to the significance of OER is the World OER Congress in Paris in June. It will bring together ministers, officials and experts to assess the state of play with regard to OER.

One important aim is that governments endorse a declaration encouraging OER and, as is the case of research publications, to make educational materials developed with public funds freely available. There will also be a parallel event where non-governmental bodies can showcase their OER initiatives.

What I shall do now is briefly to take you through the current draft of the Paris Declaration of OER and invite your comments on it either here or in the next seven days before we update it for the Bangkok Forum. You have copies of the draft Declaration in your packs.

It starts with a preamble linking OERs to some important internationally agreed statements about expanding education and fostering diversity, noting that OER can help to further these objectives.

It then invites governments to take action in ten areas:

- To foster awareness of the potential of OER to advance education;
- To create enabling environments for the use of ICT;
- To promote and adopt legal frameworks for open licensing;
- To support the sustainable development of quality learning materials;
- To foster the emergence of new strategic alliances for OER;
- To encourage the development of OER in a variety of languages and cultural contexts;
- To encourage research on the use and impact of OER;
- To facilitate the identification, retrieval and sharing of OER;
- To encourage private and non-governmental institutions to contribute to OER repositories; and finally, and most importantly,
- To encourage the open licensing of educational materials produced with public funds.

As you see, we have included a short explanatory paragraph under each heading. We have deliberately kept the language simple because our work so far has shown us that many governments have only limited awareness of OER, still less of the technical language that goes with them.

We have also concentrated on the ends rather than the means; on the principles rather than on the details of implementation.

As I noted earlier, there is now an iterative process of refinement of the Declaration and we invite you to contribute to it.

You can comment on the current draft on the Weebly indicated here and in a week's time we shall do a new draft for Bangkok taking those comments into account. We also invite you to register for the Congress and its parallel event.

Conclusion

I shall stop there. The aim of this project is to get governments to promote OER and the use of open licences. We believe that this project will help you, as players in the Open CourseWare movement, to get the concept of open availability of materials into the mainstream of education.

Thank you.