Ten Years of OER: the Road Ahead

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Transcript

Distinguished Colleagues,

It is a pleasure and an honour to be here and I am very grateful to Prof Mandla Makhanya, Prof Narend Baijnath and the organisers for the invitation. My topic today is '**Ten Years of Open Education Resources: The Road Ahead'**

I shall first review some of the landmark developments in OER in the last ten years and look at the lessons learned during this time. I will then share some of COL's contributions that may be of interest, identify the issues that remain and look at future directions.

Let us first look at some key developments in the last decade that have had a lasting impact on the way we think about teaching and learning.

We have seen a global movement towards collaboration in the development and sharing of content. The emergence of a global commons powered by the collective intelligence of the masses led to the global community coining the term Open Education Resources or OER at a UNESCO meeting in 2002.

Massachusetts Institute of Technology's (MIT) Open Courseware (OCW) initiative, in which teachers placed their lecture notes online for free use, was the practical manifestation of this aspiration. The UK Open University's Open Learn followed by placing existing self-instructional materials, in online format. Another step forward was the Virtual University for Small States of the Commonwealth, or VUSSC, where the capacity is built to develop courses collaboratively using free authoring tools. (Daniel, Kanwar and West, 2007).

The Cape Town Declaration in 2007 brought together the leaders of the OER movement who signed a joint Declaration calling upon educators to participate actively in the movement, and to contribute content as OER. They believed that tax-payer funded resources should all be OER.

As you know, COL and UNESCO have been working for several years now to promote the development and use of OER. The 2012 World OER Congress was organized jointly in Paris to mark the tenth anniversary of the term OER, with generous support from the William and Flora Hewlett Foundation.

The Paris Declaration makes 10 recommendations. Let me just refer to three that may be of interest to you:

- Foster awareness and use of OER

- Encourage the development and adaptation of OER in a variety of languages and cultural contexts

- Encourage the open licensing of educational materials produced with public funds.

This is an important development as governments tend to take such internationally-agreed documents led by multilateral organisations like UNESCO and COL, seriously.

In August last year, the Commonwealth Education Ministers met in Mauritius for their triennial conference. OER featured prominently in the ministerial Communique. This again is an influential document that is taken seriously by policy makers across the 54 Commonwealth Member States. Ministers recommend that *'a common platform for OER materials be set up for ease of access' and 'the development and use of OER in providing quality teaching and learning for all'* be promoted.

What have we learned in the last ten years?

First, when the term OER first emerged, the primary focus was on higher education. In the ten years that have since lapsed, the world has changed radically. There is a greater global participation in primary education, which has inevitably led to a surge in secondary schools. As more governments address the issue of providing secondary education for all, any discussion of OER must include this sector as well.

Second, OER in the last decade has emerged as both a bottom-up movement premised on volunteerism, as well as a set of processes planned and directed from the top-down. For example, the large scale production of published OER in the Asian region have received sustained Government support whereas in most of the OECD countries, OER development has generally proceeded locally, at the institutional and individual levels. Future advocacy therefore will have to clearly align itself to the needs of these two complimentary approaches.

Third, recent surveys in some of the Asian countries revealed that access to the Internet for using OER is no longer such a dire issue among institutions in the Higher Education sector. This is a welcome development. One of the most popular technology platforms in the developing world today is the mobile phone. Linking the issues of access and re-use of OER with the increased availability of affordable cell telephony would be one way forward.

Fourth, the OER movement is resulting in a multi-directional flow of knowledge. We have usually seen a one-way flow of knowledge from the developed to the developing world. OER can provide for a global exchange of knowledge, as we have learnt from the work of OERAfrica. A lecturer at the University of Ghana, Medical College developed a simple procedure for a Caesarian section and video-taped it. It is now being used in the Netherlands. Similarly a lecturer at the Kwame Nkrumah University of Science and

Technology, Ghana, who also happens to be a world authority on the buruli ulcer has developed an OER module which is being used by the World Health Organisation and the University of Michigan.

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. Lack of understanding of copyright and open licensing at senior levels in academic institutions as well as ministries is a roadblock for OER Development.

Research on OER will be critical to the sustainability of the OER movement. Currently, such research is done in isolated pockets and will need to be scaled up to generate the evidence needed. Current availability of software tools to search for, locate and retrieve OER is a limiting factor in the wider use of OER. There is a need to foster innovation and adaptive research in this area. An alliance of various stakeholders can make such global research more effective in terms of delivering value for money.Research on OER itself is a matter that is currently being looked at several places such as the IDRC funded projects and the OER Research Hub of OUUK (supported by Hewlett)

Finally, localisation is at the heart of the OER process. A PhD thesisexamines how OER are being used in 12 Community Technology Centres in remote regions in Nepal for providing non-formal education. The study concludes that the successful adoption of OER depends on effective localization and proposes 4 principles:

First, it is important to involve the locals and cast the OER into the language of the select constituency-- for example, a housewife speaks differently from a shopkeeper. Second, a community of practice is essential as it bolsters localisation . The community interacts through group conversations, or through social media and learn from each other. Third, the localization must be done in appropriate formats, which could be audio, text, video, wall newspaper etc. The fourth principle is that effective localization is proportional to the understanding of local contexts. While these principles have emerged from a non-formal educational project, these can be adapted to the formal education.

In which ways has the Commonwealth of Learning contributed to the promotion and use of OER?

COL will continue its partnership with UNESCO and other like-minded organisations to focus on four areas: one, advocacy and awareness generation regarding the benefits and availability of OER; two, policy development on OER at the national and institutional levels; three, capacity building so that more governments, institutions and individuals are able to effectively harness the potential of OER and four, promote research through its publications on OER and its Chairs programme.

Recent policy advocacy interventions of COL include a recent event in South Africa in which 11 SADC countries participated. The Goal was to promote an adequate understanding of the rationale and processes of OER policy development for the promotion of access and quality

COL has helped the government of Antigua and Barbuda to embed OER in their ICT in Education Policy. The Ministry will adopt a CC default licence for all publicly funded materials. Grenada and St Vincent & the Grenadines are next in the process of developing policies.

COL took the lead in developing an organisational policy on OER in 2011. The World Bank established an Open Knowledge Repository the following year. More recently UNESCO has adopted an Open Access policy for its publications.

The Virtual University for Small States of the Commonwealth (VUSSC) is a consortium of 32 small states which have come together to develop capacity in online course development. This is a university of, for and by the small states of the Commonwealth. Several need-based courses on "Disaster Management", "Tourism' 'Entrepreneurship' 'Fisheries' etc have been completed and are available on COL's website. Teachers who had never developed a single page of online material are now training other colleagues.

COL has developed a Directory of courses which are available freely from different institutions in the Commonwealth.

It is interesting to note that over 1200 courses are available, with 350 offered by the National Open University of Nigeria alone.

In spite of the efforts made by the international and national OER communities, there are certain major issues that need to be addressed for OER to realise its transformative potential.

First, the digital divide across the world is still alive and well. While in North America, there are over 80 computer and internet users per 100 persons, in Africa, the number of computer and internet users is less than 10 per 100 persons. So if we look at OER as 'technology' we certainly start with a very major disadvantage. The present debates in OER are *too focused on technology* and there is rarely any discussion on issues such as stakeholder engagement and the politics of power.

In his analysis of the networked society, Castells (2009) has elaborated the *network-making power* which operates on the basis of two mechanisms: the ability to constitute, program and reprogram networks and the ability to connect and ensure cooperation. Many important stakeholders of education may be far beyond this network-making power due to regional, gender, class and ethnic factors. It is obvious that Africa, South Asia and Latin America may have limited potential in network-making power. These types of power play a major role in the inclusion-exclusion of various stakeholders.

Can OER help us address issues of equity and inequality? Justin Reich argues that OER by itself will not address equity issues.

Institutions and groups with better access to resources and infrastructure will make more use of the educational technology innovations such as free and open resources rather than marginalized groups. He proposes two scenarios.

In the left figure, everyone benefits from new educational technologies, but low-income students disproportionately benefit. The hope here is that as the ecology of education is flooded with new free and nearly free resources, low-income students will have access to resources previously only available to students in affluent schools. In the right figure, everyone still benefits, but now the wealthy disproportionately benefit. ….. … teachers working in schools serving low income students simply can't make as much use of…. the technology ….. because they lack the planning time, broadband access, etc.

This is still a good thing–everyone is better off than before–but the opportunity gap between wealthy and poor has expanded.

If the second model is true, then virtually every education technology initiative including OER <u>which does not specifically target the needs of particular populations</u> will disproportionately benefit the wealthy, even if the materials are free.

The third issue is: can OER thrive in closed institutional settings? Many educational institutions have traditional governance structures and teacher-centred pedagogic models.

The OER initiative requires a learner-centred and decentralised approach. Will the centralised structures allow a decentralised approach?Innovations in institutional governance will be critical to the success of OER.

In short, OER can become an effective innovation for development if we use a participatory approach, encourage decentralised institutional structures and learner-centricity. Thus "*open*" in OER must be perceived not merely from a technological perspective but also from a governance standpoint. The "*open*" should reflect the institutionalisation process which facilitates all types of stakeholders to participate on equal terms

A recent survey of how OER are being used in 13 Asian countries, sum up the key challenges that different constituencies face.

Teachers felt they did not have either the time or the capacity to locate, adapt, and re-purpose OER material relevant to their work.

Learners felt that OER should be fully open, half-open didnt help and materials should be accessible on alternative technologies such as mobile devices.

Technical support personnel said there were no standard practices in the packaging and re-use of OER.

Management was concerned about the challenges relating to intellectual property and copyright issues. Concerns regarding competition and revenues were also raised.

Another issue is how to involve a wider constituency of stakeholders. Innovative approaches are needed to include various stakeholders in the development, renewal and use of content so that passive consumers can become active producers of knowledge. What incentives can be provided to involve faculty to participate in this movement? The fundamental players are the teachers and the students. How can we reach them in remote and marginalized communities? It is these communities that need most help to improve the quality of education. Many of them have not heard of OER. How can we make them active partners in this movement?

Finally, many strong players in OER have emerged in the different regions of the world. There are many international regional and national initiatives in OER. How can these different groups come together as a network of stakeholders to enhance our collective impact?

What do the trends indicate? What are the directions for the future? Can OER increase access, improve quality and cut the costs of education as we have been claiming?

OER require a process-oriented approach in which stakeholders and citizens come together and articulate their views and influence institutional change. What is a process-oriented approach for OER? The action which Breck (2003) talks about is social action which could involve skills of collaboration and the ethics of generating new knowledge. By shifting the discussion to the social and ethical domain from a purely technology angle, the base of those who can participate in the OER initiatives can be broadened. And this includes those on the wrong side of the digital divide.

Silverstone, Hirsch and Morley's (1992) domestication process is helpful here. They argue that technology defines as well as is defined by communities that adopt or challenge it. How can OER be domesticated?

Appropriation refers to the ability of every stakeholder to have access to technology tools and infrastructure irrespective of class gender ethnicity

Localisation refers to the importance of embedding OER in the values of the community

Incorporation takes us to the next step when OER are used to strengthen the educational goals of the community

Conversion is the stage when the stakeholder develops a sense of agency and is empowered to not only connect with and influence developments in the global community.

This domestication process is critical in getting stakeholders involved so that OER becomes a mass movement.

For domestication to work, we need wider participation, opening up of closed systems and learner-centricity. In which ways can national governments and institutions contribute?

National governments in developing countries should seek to promote and *sustain an enabling environment i*n which the OER movement can flourish. They need to:

1. develop an ICT in Education policy

2. propose a vision and strategy for not just developing OERs but also for using them at all levels: primary, secondary and tertiary—since the maximum number of students (upto 90%) will be affected at the basic levels.

3. Recognise OER-development at par with academic publications to reward faculty in promotions.

South Africa, Mauritius and India have adopted national policies on OER.

The Indian Minister the Hon Shashi Tharoor in a recent speech at the National Council for Educational Training and Research said 'I am glad that the NCERT has taken the initiative of declaring that the NROER will carry the CC-BY-SA license. I have been lobbied by Wikimedia and other advocates of open educational resources for this standard to be adopted, rather than the CC-BY-SA-NC which contains

a more restrictive clause. This decision by NCERT is in tune with UNESCO's Paris Declaration on Open Education Resources'. This could have a very major impact on the development of OER in a large country like India. More such political will is needed to generate awareness amongst the remotest constituencies.

What incentives and other institutional mechanisms and processes need to be put in place to facilitate the growth and mainstreaming of OER in educational institutions? Some of the initiatives need to include:

1. developing an ICT policy within the institution

2. elaborationg a policy on copyright

3. providing incentives for faculty members such as increments and recognition of OER towards promotions

4. developing a strategy for involving stakeholders

In conclusion, let me raise three critical questions:

Given the uneven development of technologies, how can OER reach the digitally deprived and socially excluded?

Are we simply replicating and scaling up existing teaching-learning practices through the use of OER? How can we use OER to transform the paradigm of teaching-learning?

In the past year, the hype about MOOCs has overshadowed the attention on OER. How can MOOCs & OER be blended to offer more effective ODeL?

With that, let me thank you for your attention.