Fostering Governmental Support for Open Educational Resources Internationally

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Commonwealth of Learning

Sir John Daniel speaking

Representatives of the Governments of Central and South America, Colleagues from Civil Society Organisations, Sponsors, Ladies and Gentlemen,

It is a great pleasure to be here and to welcome you to the Regional Policy Forum for Latin America 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.

In this joint address I shall present the background to the project and our Senior Consultant, Stamenka Uvalić-Trumbić, will describe the project itself, update you on the responses we have received from your countries and outline our hopes for this meeting.

May I begin by expressing our deep gratitude to all those individuals and organisations that have supported the holding of this Forum in Brazil. I express particular gratitude to the Municipal Secretary for Education of the State of Rio de Janeiro and the Universidade Gama Filho in whose building we are meeting.

We are delighted to be holding this Forum in Brazil for several reasons.
First Brazil is by far the largest member of the community of Portuguese-speaking, or Lusophone, countries. One of the important aims of UNESCO’s involvement in OER is to increase the availability of quality educational materials in languages other than English.

Second, the situation regarding OER in Brazil was the subject of a very interesting study carried out last year by Andreia Inamorato dos Santos on behalf of UNESCO’s Institute for Information Technologies in Education.

This report revealed many Brazilian projects to make educational materials freely available, particularly through action by the Ministry of Education in Basic Education. Indeed, some of this activity predated the first use of the term ‘Open Educational Resources’ in 2002. For that reason, perhaps, the term OER is not yet in widespread use to describe these activities.

I suspect that what I have just said about Brazil applies to the rest of Latin America. Certainly the Hispanophone world represents such a large language group that the sharing of educational materials as OER seems like a natural and desirable development.

The focus of our project is fostering governmental support for OER, and we suspect that as in Brazil, a number of other countries have a various OER initiatives under way that would benefit from better coordination and more proactive government policy.

My colleague Stamenka will report on your responses to our survey about OER in Latin America in a moment.

She and I made a visit to Loja, in Ecuador, in 2008 to see the remarkable developments at the Universidad Tecnica Particular de Loja under the leadership of the then Rector, Luis Miguel Romero.

That visit coincided with the CREAD and Virtual Educa conferences and also with the launch of Creative Commons Ecuador. The use of Creative Commons licences has spread steadily in this continent in recent years and I mention that because one of the issues highlighted in the report on OER in Brazil is that materials are often declared to be freely available simply by assertion, whereas a more formal type of open licensing, like Creative Commons is necessary if people are to use and adapt materials with confidence. I am sure that we shall come back to that in discussion.

For the moment, let me set the stage for this meeting before handing over to Stamenka.

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 recent Policy Forum on OER in Africa 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 has now become 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.

Interestingly, two of the key political declarations on OER were signed in Africa, the Cape Town Declaration that was developed in 2007, and the 2009 ‘la Déclaration de Dakar sur les ressources éducatives libres’. Stamenka will say more about those later in the context of the Paris Declaration on which we shall ask you to work at this meeting.

The reason that we conducting this project and holding this Regional Policy Forum is simply that Open Educational Resources have great transformative potential and respond to a particular need in Latin America.

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, which declared that it will post 100 of its courses online free of charge in September 2001 and would make materials from all its courses freely available online by 2007, 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 reach of the OER movement remained 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 invite Stamenka to take up the story from there.

Ms. Stamenka Uvalić-Trumbić

In 2009 UNESCO held a World Conference on Higher Education, of which I was the Executive Secretary. It brought together close to 2,000 participants representing higher education worldwide. We were honoured to have Fernando Haddad, Minister of Education of Brazil, as one of our speakers.

In its Communiqué the World 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 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. 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*. We were pleased to have OER Brazil part of the drafting process.

All this laid the foundations for the next stage.

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, in his seminal book “Free Culture” wrote 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 built ‘awareness around the changes that we need’.

The project has three interlinked activities.

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 represented here will have received survey questionnaires from UNESCO.

We have received to date replies to the Survey from 11 Latin American countries (and more are coming in). We now have replies from Argentina, Brazil, Chile, Colombia, El Salvador, Guatemala, Mexico, Paraguay, Peru and Uruguay.

We are most grateful to those who have already replied and invite you to send in your reply if you have not done so.

The replies from the 10 countries demonstrate that a number of countries (e.g. Argentina, Brazil, Colombia, El Salvador, Mexico, Peru, Uruguay) reportedly have some governmental strategy or policy related to OER.

It is interesting to note that many of these strategies consist of government Portals (Argentina: *Portal Educar*; Brazil: *Portal do Profesor*; Colombia: *Educacion Portal “Colombia Aprende”*; El Salvador: a webspace to share resources, courses, books; Mexico: *Habilidades Digitales Para Todos – HDT website*; Uruguay: *Education Portal “URUGUAY EDUCA”* offering access to teachers to OER, especially secondary schools). Peru’s strategy is to promote OER through its Ministry of Education for the use of teachers.

Some responses have a wider range of policy documents that cover more generally ICTs and Open and Distance Learning, some of which may or may not include OER. (e.g. Brazil: *TV Escola, Bank for International Educational Objects*; Mexico *Encyclomedia, Telesecondaria*, Uruguay Plan CEIBAL, XO: *one laptop per child*. In Paraguay, the Development Plan for ICTs includes free educational resources for
training the talented. Generally the use of ICTs is perceived as offering equal opportunities in education and OER are appealing for its notion of sharing and being free. Some of the replies mention the use of open licences such as Creative Commons, but not on a regular basis (Brazil, Colombia, Mexico, Uruguay…)

Finally, responding countries that do not have any strategies, policies or documents (Chile, Guatemala), mention internal initiatives in the Ministry and believe that the government should develop those in the future. In addition, both countries believe in the potential of OER, some report on the unfortunate lack of understanding of the benefits of OER for the whole education eco-system and one reply (Chile) suggests that there is a need to shake both the printed textbook industry which is adverse to innovation but also the ICT industry which is privatised and commercial.

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. The notion of sharing clearly is also an important asset.

Major obstacles to their use are copyright (Chile, Paraguay), sustainability and in some cases connectivity (Guatemala, Paraguay). 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 a large extent of public funding for learning materials. Another feature of the replies from this region is that OER are in greater use in secondary or even primary level education than in tertiary.

The second activity of the project is regional policy forums.

The discussion here in Latin America is the third of a series. We have 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. Between now and June we will hold Regional Policy Forums on OER in remaining UNESCO regions to cover them all: Europe and Asia/Pacific in April and the Arab States Region in May.

One focus for those meetings – and for the discussion here – 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. After the Regional Policy Forum in Africa, a second version – Declaration v.2 has been produced, incorporating specific African inputs. This is the document included in your packages.

Following the Rio Forum, based on your inputs the Declaration v.3 will be elaborated and further developed at the three remaining regional forums. The OER Congress will adopt the final version of the Declaration. The IALG mentioned earlier, where the Latin American Region is represented by Uruguay will act as the Drafting Committee.

Sir John mentioned the earlier declarations adopted in Cape Town in 2007 and Dakar in 2009. How will the Paris Declaration differ from these?
We consider that it is part of an evolutionary process. Back in 2004 Larry Lessig underlined the importance of engaging politicians in promotion of OER. The Cape Town Declaration of 2007 called for governments and institutions to make open education a high priority. In 2009 the Dakar Declaration emphasised ‘la sensibilisation des décideurs politiques pour... (promouvoir) la mise en place de dynamiques qui favorisent l’émergence de réglementations sur les REL’ and the UNESCO General Conference urged greater political engagement with OER.

UNESCO and COL believe that the time is now ripe for governments to engage with OER in a more formal manner.

As I mentioned earlier, you have a copy of the second draft of the Declaration in your packages and we look forward to your feedback in the sessions devoted to it here.

The aim of the Declaration is to get greater buy-in from governments to the promotion of OER and of open licences generally. OER have great potential for reducing the cost of expanding quality education, so we hope that governments will adopt a Declaration urging that educational materials produced with public funds be made available under open licences. 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.

This is part of a wider campaign to ensure that the public benefits from what the public has paid for.

We believe 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. We look forward to discussing these ideas with you.