

Fostering Governmental Support for Open Educational Resources Internationally



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Fostering Governmental Support for Open Educational Resources Internationally

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Ladies and Gentlemen,

It is a great pleasure to be here with you and to make a joint presentation with Sir John Daniel, first drawing on our experiences at UNESCO and the Commonwealth of Learning (COL) in creating a sharing culture for OER and then outlining our aspirations for expanding the adaptation and re-purposing of OER much more widely.

We have entitled our presentation *Fostering Governmental Support for Open Educational Resources Internationally*, which is also the title of a new project that COL and UNESCO are implementing with support from the Hewlett Foundation.

I shall begin by giving some background and tracking the decade-long trajectory that has led our two intergovernmental organisations to this particular project.

I will begin by taking you back to 2002, when UNESCO began its involvement in OERs and note some of the milestones in the work that followed. Sir John will then continue by presenting the collaboration on OER between UNESCO and COL that led to this new initiative, which he will present in more detail.

At the beginning of the century, two parallel trends were developing:

- In 2002, MIT announced its OpenCourseWare programme and began putting course material free of charge on the web, a significant initiative that sounded too good to be true. Coming from an

eminent institution with scarcity at the heart of its business model, it was met both with enthusiasm and suspicion.

- That same year, another global development was causing alarm in higher education institutions (HEIs). An OECD conference in Washington explored the application to higher education of the World Trade Organisation's (WTO) Global Agreement on Trade in Services (GATS).

One paper was entitled, provocatively, *Trade, Education and the GATS: What's In, What's Out, What's All the Fuss About?* Both HEIs and many Governments were very concerned that trade and commercial concerns would prevail over quality and national sovereignty in higher education if this agenda were pursued.

Given its primary function of providing governments with policy advice on significant and topical issues, UNESCO launched a Global Forum on International Quality Assurance in 2002 with the aim of putting higher education in the driving seat in matters of quality assurance.

This led to a close collaboration between UNESCO and the OECD in developing the 2005 Guidelines on Quality Provision in Cross border higher education, which was an educational response to the growth of trade in educational services and cross-border higher education. By joining forces UNESCO and OECD united the rich countries of the OECD with the universal coverage represented by UNESCO's 193 Member States.

The Guidelines focussed on notions of quality, national sovereignty and cultural diversity and addressed a set of recommendations to the six major higher education stakeholder groups: governments, institutions, quality assurance and recognition bodies, professional bodies and students.

The main objectives of the Guidelines were to raise awareness about what GATs was and what it was not, to provide an educational response to the designation of higher education as a tradable commodity and to show under what conditions cross-border HE can contribute to building the much needed capacity in higher education. This was especially important for the developing world as it struggled to satisfy the increasing demand for higher education that the national public sectors and local providers were unable to meet.

In parallel to this work, as a consequence of the enthusiasm generated by MIT's OpenCourseWare project, which planned to 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, WCET, the Hewlett Foundation, the Commonwealth of Learning (COL) and HEIs from the developed and developing world 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 OER was coined as a general descriptor that included Open Courseware (OCW) and a series of recommendations were made for future work.

The participants adopted a final Declaration. The text expressed “their satisfaction and their wish to develop together a universal educational resource for the whole of humanity, to be referred to henceforth as Open Educational Resources”.

How have these two developments, the GATS and OER been pursued and where do we stand now in terms of governmental policy in these areas?

Over the last decade the GATs became a dead letter because of the failure of the Doha round of the World Trade Organisation. Nevertheless, cross-border higher education has increased by leaps and bounds, both in its positive aspects of capacity-building but also in its negative manifestations such as degree mills. A survey in April 2011 showed that the UNESCO-OECD Guidelines on cross-border provision are as relevant as ever and that the majority of governments surveyed have followed up with some sort of national regulation directly inspired by those Guidelines.

Similarly, the 2002 Forum on OCW and OER stimulated a series of developments, in particular at grassroots level and in awareness-raising. The OCW and OER initiative has developed into a global movement. Through an internet discussion forum led by Susan D’Antoni of 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 2010 UNESCO’s Communications Sector developed this into the World Summit on the Information Society Platform OER Community, which now has upwards of 1,600 members.

Meanwhile the Education Ministers of the 32 small states of the Commonwealth had announced the idea of a Virtual University of Small States of the Commonwealth in 2000, and when its implementation began in earnest in 2006 it was natural to make the creation and re-purposing of OER a key mechanism of collaboration.

Despite all the enthusiasm and idealism, however, the reach of the OER movement remained limited. The 2002 Forum at UNESCO, building as it did on the MIT OCW experience, focussed only on higher education.

You could say that OER existed in a parallel universe without confronting the licensing and legal issues necessary to ensure their wider use. By 2009 it was easy to get the impression that the Open Educational Resources community had become, paradoxically, a somewhat closed group of aficionados focussed strongly on the production of OER with less attention to their adaptation and re-purposing.

Clearly OER were not going to make much headway in the wider educational world until governments and institutional leaders grasped their potential. Furthermore capacity building in creating and using OER was sorely needed.

This was why, at UNESCO’s 2009 World Conference on Higher Education and at the UNESCO General Conference later the same year, there was a sense that the OER movement needed to break out beyond the grassroots level and be raised as a policy issue, much as the Guidelines on Cross-border provision impacted on national policies and regulations in the last decade.

Thus in 2009 a resolution was presented to UNESCO's General Conference, the ultimate decision making body of the UN's specialised agency for education, science, culture and communication, requesting it to promote OERs further, as a follow-up to the World Conference on Higher Education.

Before passing the floor to Sir John who will tell you how COL and UNESCO have implemented that General Conference resolution on OERs through capacity-building and policy development, let me say a few words about UNESCO's strengths in furthering policy agendas.

UNESCO is an intergovernmental organisation of 193 Member States and it has five basic functions in the areas of its mandate: to be a laboratory of ideas; a catalyst for international cooperation; a standard-setter; a capacity builder and a clearinghouse.

UNESCO's General Conference meets every two years where the 193 governmental representatives adopt its programme of work for the next biennium. UNESCO's great strength is its convening power. For example, the 2009 World Conference on Higher Education, of which I had the honour to be Executive Secretary, brought together close to 2000 participants representing the "Who's Who of Higher Education" worldwide.

In addition, the conventions, declarations, recommendations that express UNESCO's standard-setting function are often key stimuli for national governments. These multilateral agreements, which are always based on consensus, represent 'soft law' that inspires the development and revision of national regulations and norms.

Before I hand over to Sir John to bring the story up to date, I must say that I found yesterday's discussion of Creative Commons 4.0 fascinating. During my 20 years at UNESCO I was involved in the drafting and adoption process for several international agreements. My experience is that the more you strive for universality the harder it is to reach consensus.

Sir John Daniel

Thank you Stamenka:

I shall now update you on how COL and UNESCO are implementing the resolution at the 2009 UNESCO General Conference.

Our work is in three overlapping parts: the 2010 activities that were punctuated with a Policy Forum on OER at UNESCO last December; the work that grew out of the Policy Forum; and our plans for 2011-2012. I shall end by making two requests of the Creative Commons community.

The 2009 General Conference resolution urged that policy makers be alerted to the potential of OER for attaining a range of development goals in education at all levels.

COL has examples of using OER to foster learning for development in various ways.

Stamenka mentioned the Virtual University for Small States of the Commonwealth, which is probably the most international of all collaborative OER initiatives. 32 countries are jointly creating and versioning OER.

At the K to 12 level six countries, five African and one Caribbean, have shared the work of creating a complete senior secondary curriculum as OER.

COL is also part of the TESSA consortium – Teacher Education in Sub-Saharan Africa, which engaged 320,000 African teachers in using OER with millions of children last year.

All this is positive but this work has taught us that general awareness of OER is still very limited among educational decision makers.

To change this COL teamed up with UNESCO in a project called *Taking OER Beyond the OER Community: Policy and Capacity for Developing Countries*. The aim is to inform developing world decision-makers about the game-changing potential of OER. In the last eighteen months we held six workshops about OER:

- For university presidents at the Conference of the Association of Commonwealth Universities in South Africa.
- For quality assurance officials at the conference of the International Network of Quality Assurance Agencies in Higher Education in Namibia.
- For educational leaders in French-speaking countries in Mali.
- For distance educators at COL's Pan-Commonwealth Forum on Open Learning in India.
- At a conference on ICTs in development in Tanzania.
- For Teacher Educators in Mozambique.

Still to come is a workshop in Malaysia with the Asian Association of Open Universities, which accounts for tens of millions of students.

Three online workshops were also conducted in 2010. Taken together these workshops reached hundreds of decision makers from many countries, most of whom previously had only a dim idea of OER.

Last December we updated members of UNESCO's Permanent Delegations on this work at a policy forum in Paris. That led us to create two documents to back up the next stages of the project. The first, published last month is a *Basic Guide to OER*, written by South Africa's Neil Butcher under the editorial guidance of Stamenka and COL's vice-president, Asha Kanwar.

Also issued last month, as a collaborative effort by UNESCO's Zeynep Varoglu and COL's Trudi van Wyk, were *Guidelines for OER in Higher Education*. These are now the subject of a formal consultation which has already attracted many responses, including from Creative Commons.

Stamenka and I are launching the third stage of this work today. Its aim is to get greater buy-in from governments to the promotion of OER and of open licences generally.

On 21-22 June 2012 UNESCO will hold a World Conference on OER in Paris. This next stage of our project will encourage governments to adopt a conference statement urging that all educationally useful

materials produced with public funds be made available under the most open licences possible. Government backing for open licensing is essential if we are to make OER the normal way of doing business instead of a marginal, donor-driven phenomenon.

UNESCO and COL had already planned to campaign for this outcome and the Hewlett Foundation has offered support to make the process more systematic. It will have three overlapping phases.

The first phase, now under way, is consultation on the *Guidelines for OER in Higher Education*. These are loosely modelled on the *Guidelines for Quality Provision in Cross-Border Higher Education* that Stamenka mentioned and, like them, offer recommendations to various stakeholder groups, notably governments.

In phase 2 we shall question governments about their policies and intentions on OER and open licensing. This will yield an inventory of current practices and policies with respect to open access to educational material that we shall share widely.

Phase 3 is the drafting of a statement on open access for the June 2012 Conference. UNESCO's Member States expect opportunities for involvement in the drafting of statements presented to them for adoption. The *UNESCO-OECD Guidelines on Quality Provision in Cross-Border Higher Education* were adopted by consensus because governments had had ample opportunity to shape them.

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.

We end by requesting Creative Commons to help us in two ways. Intergovernmental organisations that want to publish more of their material under open licences need to have confidence in those licences. In particular, they need to be certain that under the CC international licence they are not tying themselves to a particular jurisdiction for copyright. So we ask that you do more to make intergovernmental organisations aware of what you have already done to create an international licence and involve them closely in drafting further versions.

Many developing countries will follow the lead of UNESCO in adopting open licensing for educational materials, so facilitating their use by UNESCO and other IGOs is directly in the interest of Creative Commons.

Our second request is that you share with us, country by country, your key contacts in your national governments. Our survey of open access practices will be greatly facilitated if we can knock at the right door in each government administration to ask our questions.

In conclusion, we believe that this joint UNESCO – Commonwealth of Learning project has the potential to get the concept of open access to materials more fully absorbed into the bloodstream of education and we hope you will support it. The Commonwealth of Learning believes that knowledge is the common wealth of humankind.