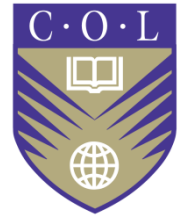


Fostering Governmental Support for Open Educational Resources Internationally



Project Update

INTERNATIONAL ADVISORY AND LIAISON GROUP (IALG) 2nd Meeting

Paris, 11 May 2012

*Sir John Daniel
Commonwealth of Learning*

Introduction

Your Excellencies, Representatives of UNESCO's Electoral Groups, representatives of inter- and non-governmental Organisations, Ladies and Gentlemen,

It is a great pleasure to be back with you again. We last met at the first meeting of this International Advisory and Liaison Group on 19 December last year.

At that time this project, "*Fostering Governmental Support for Open Educational Resources Internationally*", was just beginning. Much work has been carried out since then and I want to begin by expressing my warm thanks to our project team.

The project is being implemented by a partnership between the Commonwealth of Learning and UNESCO with partial support from the William and Flora Hewlett Foundation.

This has been a most successful partnership. Mr. Janis Karklins, ADG for Communications and Information, and I have directed the project and we have relied heavily on our Senior Consultant, Stamenka Uvalić-Trumbić. Among other inputs she has ensured that our work has been impeccably and rapidly documented after each of the Regional Policy Forums that I shall describe.

We are indebted to our colleagues at COL and UNESCO for their great contributions, notably from Trudi van Wyk and Patricia Schlicht at COL and Zeynep Varoglu and Abel Caine at UNESCO. I also acknowledge the important work of our other consultants.

Sarah Hoosen has prepared a report on our survey of governments that will be available in the coming days. Alison Clayson is evaluating the effectiveness of our efforts and will give you a short questionnaire today.

Annapaola Coppola is the administrative glue to the project here at UNESCO and, like everyone else involved has worked with terrific speed and efficiency. I thank them all for making this such a productive and satisfying odyssey!

The Four Elements of the Project

Let me recall that the project has four elements:

1. A survey of the world's governments to determine whether they have, or intend to develop, policies for the use of Open Educational Resources,
2. The holding of Regional Policy Forums in six world regions,
3. The World OER Congress to be held here from 20-22 June,
4. The Paris Declaration that will be presented at the Congress.

I shall report on three of these elements: the survey; the regional policy forums; and how the Paris Declaration has evolved with input from the six regional policy forums to become the text that you have in front of you today. ADG-CI will tell you about preparations for the June World Congress.

I begin by situating this project, which is part of a wider trend towards greater openness and sharing that has been gathering momentum for over twenty years. It is helpful to divide its manifestations in education into three elements, all of which figure prominently in UNESCO's work and are inter-related.

Open source software has a long history.

The term 'open access' is usually used to refer to open access to research results, especially where the research has been supported by public funds. The open access movement is thriving and controversies about access to research journals have been in the news recently.

Open Educational Resources are defined as educational materials that may be freely accessed, reused, modified and shared.

The term Open Educational Resources, or OER, was coined at a forum held at UNESCO exactly a decade ago. The topic was the *Impact of Open Courseware for Higher Education in Developing Countries* and reflected the growing movement to make educational materials freely available for adaptation and reuse. Participants declared "their wish to develop together a universal educational resource for the whole of humanity, to be referred to henceforth as Open Educational Resources".

The Open Educational Resources movement has gathered accelerating momentum since that 2002 Forum thanks to the commitment of educational institutions, NGOs and some governments to making educational material freely available for reuse, notably where that material was created with public funds.

The World OER Congress that we are holding in June is partly a celebration of the tenth anniversary of that important UNESCO event, which created a global movement for the open licensing of educational and creative works.

UNESCO has continued to promote the OER movement since that first event.

Through an internet discussion forum led by 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 2,000 members.

Despite all the enthusiasm and idealism, however, the awareness of the significance of OER for education was mostly limited to the grassroots level. The 2002 Forum at UNESCO, building as it did on the Open CourseWare movement initiated by the Massachusetts Institute of Technology, 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.

In 2009 the UNESCO World Conference on Higher Education 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. That was the incentive for UNESCO and the Commonwealth of Learning to work together in awareness raising and advocacy.

We began 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 that have been made widely available across the world: *A Basic Guide to OER* and *Guidelines for OER in Higher Education*. This project laid the foundations for the current project.

Having increased awareness of OER among educational leaders the project moved its focus to governments. It is called *Fostering Governmental Support for OER Internationally* and is partially funded by a grant from the Hewlett Foundation.

We are doing this because it is now clear that Open Educational Resources have great transformative potential for education at all levels. They enable governments to maximise the benefits of their considerable investment in educational materials and are also a strong statement that education and knowledge are public goods.

I shall report on three elements of the project.

The Survey

With awareness of the importance of OER steadily increasing we felt it was time to discover more about the expectations of governments for OER and whether they were developing policies for their use.

So Step 1 was a questionnaire survey of all governments. COL sent this to the Education Ministers of Commonwealth countries in November 2011 and UNESCO sent it to all National Commissions in January of this year. So far we have received 125 responses from 92 countries and questionnaires are still coming in. The number of responses is greater than the number of countries for two reasons: first, some countries sent in replies from several ministries; second we received replies from provincial and state jurisdictions in federal states, notably Australia and Canada.

The 82 responses received before the cut-off date of 16 April have been analysed by our consultant Sarah Hoosen in South Africa and her report will be made available very soon. I shall try to give you the flavour of the responses in a moment when I report on the Regional Policy Forums.

Regional Policy Forums

The second element of the project has been the holding of Regional Policy Forums in six regions. Although the questionnaire survey was very useful, we also wanted to promote dialogue between government policy makers and OER practitioners around the world.

Let me thank the governments, institutions and organisations in Barbados, South Africa, Brazil, the UK, Thailand and Oman which hosted these events and helped us with the arrangements. I judge them all to have been extremely successful.

I shall only give a brief account here, but I am proud to say that thanks to the good work of our Senior Consultant this project is exceptionally well documented. You can find reports of all six regional forums at www.unesco.org/oercongress and at <http://oercongress.weebly.com>. The successive drafts of the Paris Declaration are also at <http://oercongress.weebly.com> and www.unesco.org/webworld/en/oer. The speeches and slides summarising the progress of the project and the responses from countries in each region are at www.col.org/speeches.

Let me now comment on the Regional Policy Forums one by one.

The first was held in January for the Anglophone Caribbean in conjunction with an ICT in Education Leadership Forum based on UNESCO's Competency Framework for ICT for Teachers. Most Caribbean

countries are introducing computers into their schools and the lack of good learning materials for this purpose made them very receptive to the notion of Open Educational Resources.

Our next Forum, for Africa, took place in February in South Africa at the University of South Africa.

17 African nations reported on the status of OER in their countries. Although none, with the exception of South Africa, have a distinct governmental policy on OER, the majority are active in the OER movement, mainly through institutions and individuals. In the minds of most respondents OER are closely associated with the introduction of ICT in education or with the development of open and distance learning, or both.

These results from Africa showed the progress that has been made since the 2009 World Conference on Higher Education at which there was a vigorous debate 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.

It now seems that this was one occasion when flagging a potential problem early helped the world to avoid it. At the Policy Forum on OER in Africa in February we found a vibrant culture of creation, re-use and re-purposing of OER. UNISA, our host for the African Regional Policy Forum, now has a proactive institutional strategy in favour of OER.

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.

For the Forum for Latin America we went to Rio de Janeiro, where 10 countries reported on the status of OERs. The majority said that they have some governmental strategy or policy related to OER or intend to develop one.

Many of the countries have educational portals and also a range of policy documents that cover ICTs and Open and Distance Learning, some of which include OER. As I shall note in a moment, the Latin American meeting was particularly helpful in refining the draft Paris Declaration on OER.

The Forum for the Europe region was held at the University of Cambridge. 18 countries in the Europe region responded to our survey. Of these 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 which then have an obligation to share their OER products.

The Asia-Pacific region is large and diverse, which was reflected in the responses to our survey from 19 countries.

Five of these countries report that they have government policies on OER in place. Most of these refer explicitly to the open licensing of educational materials.

Australia, for example, places OER in the wider context of its policy of opening up public data and resources through the Government's Open Access and Licensing Framework. In this context a number of Australian states reported on their different approaches to OER.

In China, the Ministry of Education has an OER policy, within which it has developed several OER action plans. Examples involving Chinese universities are the Video Open Courseware project and Open Digital Learning Resources for Continuing Education.

Korea replied that it has a governmental policy called the Korean Open Courseware Information Strategy Plan and an ISP for a National OER repository.

Finally, earlier this week the Government of Oman hosted our Regional Policy Forum for the Arab states in Muscat.

By then 11 countries had reported on the status of OER. Although none said they had explicit governmental policies on OER, five have a strategy related to eEducation or eLearning that includes or could include OER.

Examples are Algeria, Bahrain, Lebanon and Morocco. Morocco is particularly active. It has agreements with UNESCO and Korea to support this work.

That is a very brief summary of the tremendously rich and interesting presentations made at these six regional forums. Most of the presentations made are posted on the websites that I mentioned.

As I said earlier, a full report on the questionnaire survey will be available to you very soon. Let me quote part of its conclusions:

There appears to be great interest in OER across all regions of the world, with several countries embarking on notable OER initiatives. Indeed, the survey itself raised interest and awareness of OER in countries that may not have had much prior exposure to the concept. However, different regions face different obstacles to OER adoption, while few explicit OER policies exist and there appears to be some confusion regarding understanding of the concept and potential of OER. Many projects are geared to allowing online access to digitized educational content, but the materials themselves do not appear to be explicitly stated as OER. Where licences are open, the Creative Commons framework appears to be the most widely used licensing framework, but licensing options varies between countries.

I have focused so far on the Regional Forums as an opportunity for updates on the status of OER in the different countries.

The Paris Declaration

However, another important focus for those meetings – and for the discussion here in a moment – will be the fourth activity, which is the drafting of a Declaration on OER that will be presented to the World OER Congress in Paris in June. Let me recap.

First, it became abundantly clear through the Forums that it is very important for governments to take an active role in promoting OER. These two conclusions from the Arab States forum are typical. First, education systems and institutions in most countries rely on government leadership. Second, governments can be prime beneficiaries of OER since by using OER they will gain much greater benefits from their large investment in educational materials.

That is why we will propose to governments at the World OER Congress that they support a non-binding Declaration in OER.

We developed a very preliminary text of the Declaration after your first meeting as the International Advisory and Liaison Group on 19 December. Since then it has been developed and refined through a highly iterative process.

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 of the Declaration was produced, incorporating inputs from Africa.

This was substantially revised and simplified at the Regional Forum for Latin America in Rio, which then received minor revisions at the Europe Forum in Cambridge and improvements in content and style at the Asia-Pacific Forum in Bangkok. Further refinements and clarifications were made after the Arab States Forum earlier this week and you have this sixth version today.

Following this meeting, inspired by your inputs, version 7 of the Declaration will be created for presentation to the World Congress. You will also act as the Drafting Committee if further changes are called for during the Congress.

I will not go into detail about how the draft changed after each forum but let me try to give you some of the flavour.

I begin with three general comments.

First, as you can see, the Declaration is at the level of principles and aims rather than the detail of their implementation, which will vary widely by country.

Second, we have focussed tightly on OER rather than including the other aspects of openness that I mentioned at the beginning: open source software and open access to research literature.

Third, it was the strong view of governments that we avoid getting into technical language.

Now to give a short summary of the inputs from the regions:

From Africa the major changes were strengthening issues of connectivity and electricity, the sharing of OER across languages, stressing research on OER and developing a business model to include a wide range of stakeholders, including industry.

Latin America refined the text to refer to internationally agreed statements in the Preamble, clarify terms, refer to strategic alliances and qualify open licences “with restrictions as judged necessary”.

Europe extended the definition of OER in the Preamble, returning to an earlier formulation, and added an action item about encouraging private and non-governmental organizations to contribute to OER.

The discussion in Bangkok added CONFINTEA in the Preamble as well as a phrase that open licensing does not affect authorship. It strengthened the references to capacity-building and incentives for teachers and institutions as well as respect for indigenous knowledge. Action verbs replaced statements in each item.

In Oman this week a reference to the Millennium Declaration was added to the Preamble, we had quite a discussion on the references to open standards, and a new item on the need for policies and strategies was added.

In summary then, you already have a document that reflects inputs from all regions and we look forward to refining it further in the light of your own inputs to create version 7 for presentation to the Congress.

That is enough from me. My colleague Janis Karklins will update you on the preparations for the Congress itself.

Let me end by recalling that the aim of this project has been to encourage governments to promote OER and the use of open licences. The world tour that we have conducted has convinced us that the time is ripe for this. The OER movement is developing fast but it needs government involvement to bring it fully into the mainstream of education. Moreover governments will be major beneficiaries because of the potential of OER to improve the cost-effectiveness of their large investments in education.

We hope that this joint UNESCO-COL project has contributed to that goal.

Let me once again thank our UNESCO-COL team. And thank you for your attention.