

WORLD OER CONGRESS

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Setting the Context for the World OER Congress

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Fostering Governmental Support for OER Internationally

Introduction

Your Excellencies, Ministers, Distinguished Experts, Ladies and Gentlemen:

It is an honour to take a few minutes to provide some further context to this World Congress on Open Educational Resources.

This last year UNESCO and COL have been conducting a project entitled “*Fostering Governmental Support for Open Educational Resources Internationally*”. Let me first acknowledge gratefully the support from the William and Flora Hewlett Foundation for this project and say what a successful partnership it has been. I also recognise the tremendous work of the members of the joint UNESCO-COL team and their supporting colleagues in Paris and Vancouver.

A major purpose of the project was to prepare the ground for this Congress by raising awareness of Open Educational Resources among governments around the world. We built on an earlier joint project, conducted in 2010-2011, called *Taking OER Beyond the OER Community: Policy and Capacity for Developing Countries*. Under that initiative we held workshops for senior educational decision makers in Africa and Asia and produced two documents that are available to you at this Congress: *A Basic Guide to OER*, and *Guidelines for OER in Higher Education*.

That earlier work led directly into the current project with governments when the Hewlett Foundation offered to support it.

This project has four elements:

- A survey of the world’s governments about their use of OER
- Holding Regional Policy Forums in six world regions,
- Developing a Declaration to be presented at this Congress.
- The World OER Congress

I shall make some general comments about Open Educational Resources, report on the survey, and note some key issues. Tomorrow my colleague Stamenka Uvalić-Trumbić and I will summarise what emerged from the Regional Policy Forums.

Open Educational Resources

Open Educational Resources are 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, with major universities refusing to pay the high prices demanded for commercially published scientific journals.

Open Educational Resources are defined as educational materials that may be freely accessed, reused, modified and shared. I make the point that this includes materials in all formats. While nearly all OER are generated through digital technology, they are often used in print format. This is the case, for example, in what is probably the largest international OER project, *Teacher Education in Sub-Saharan Africa*, or *TESSA*, where OER are used by hundreds of thousands of teachers annually in at least 12 African countries.

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.

This World OER Congress 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. Since that first event UNESCO has continued to promote the OER movement globally.

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 governments. That was the incentive for UNESCO and the Commonwealth of Learning to work together in awareness raising and advocacy, starting with the project that I noted earlier, and continuing into this work.

Survey of Governments

With awareness of the importance of OER steadily increasing, a first step was to discover more about the expectations of governments for OER and whether they were developing policies for their use. So we conducted a questionnaire survey of all governments. So far we have received responses from nearly 100 countries and questionnaires are still coming in. We are most grateful to the countries that responded and will give a regional breakdown in our talk tomorrow.

The 82 responses received before the cut-off date of 16 April have been analysed by consultant Sarah Hoosen in South Africa and her report is available to you at this Congress. I shall comment on two general issues raised by the survey.

To quote from Sarah Hoosen's report:

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.

Why OER? The Business Case

Why should governments and institutions have this great interest in OER?

When the OER movement began it was motivated primarily by the ideal that knowledge is the common wealth of humankind and should be freely shared. Most institutions that decided to implement the ideal by creating OER relied on donor funding, notably from the William and Flora Hewlett Foundation. But as the OER movement developed, questions about its sustainability became increasingly pressing. It could not rely indefinitely on donor funding. Institutions and governments began to review the economics of OER in order to determine whether there was a business case for investing in them.

This project commissioned a report by Neil Butcher and Sarah Hoosen on *Exploring the Business Case for Open Educational Resources*. It is still a work in progress that will be refined in the light of additional data that comes to our attention at this Congress. Copies of the current draft are available to you.

The authors situate the contribution of OER in the wider context of the challenges facing education at all levels in this era of economic stringency. They argue that greater reliance on resource-based learning, rather than large-group teaching, will be essential for wider access to quality education.

The authors give compelling evidence that using OER can reduce the cost of creating learning resources substantially. They also present some revealing analyses of the economics of textbook production, which again show that systematic processes of investing in OER can create considerable savings for governments and students. The commercial publishing industry can play a part in this process.

My second quotation from the report raises other important issues:

...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 licencing framework, but licencing options varies between countries.

Open licensing

It was not the purpose of this project to propose particular approaches to open licensing but governments and institutions should give attention to this issue. It is not enough to place materials on a website and say that anyone can use them.

Producers should understand that open licensing takes place within the framework of copyright legislation, not outside it. Users need the assurance they can use the material and be made aware of any restrictions that apply.

In our regional policy forums we found no consensus on the restrictions that should be applied to open licensing. A majority of countries are relaxed about the commercial use of OER but a minority are opposed.

That is why you will find the phrase ‘with such restrictions as they judge necessary’ in the recommendation on open licensing in the current draft of the Declaration.

Conclusion

I 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 thanks to the potential of OER to improve the cost-effectiveness of their large investments in education.

Thank you – enjoy the Congress!