KNOU Seminar
24 September 2012

What you need to know about OER
Sir John Daniel
Fellow Korea National Open University
Plan

- History and Background
- Regional meetings
- Your questions
Fostering Governmental Support for OER Internationally

World OER Congress
Paris, 20-22 June 2012

Setting the Context

Sir John Daniel
Fostering Governmental Support for Open Educational Resources Internationally
The Project Team

John Daniel
Stamenka Uvalić-Trumbić
Janis Karklins
Trudi van Wyk
Patricia Schlicht
Zeynep Varoglu
Abel Caine
Sarah Hoosen
Annapaola Coppola
Alison Clayson
Taking OER beyond the OER Community: Policy & Capacity for Developing Countries

Zeynep Varoglu

Trudi van Wyk
Workshops

South Africa
Namibia
Malaysia
Mali
India
Tanzania
Mozambique

Plus three online forums
A Basic Guide to Open Educational Resources (OER)

col.org/resources

Neil Butcher
Stamenka Uvalić-Trumbić
Asha Kanwar
Guidelines for Open Educational Resources (OER) in Higher Education

Zeynep Varoglu

Trudi van Wyk
Fostering Governmental Support for Open Educational Resources Internationally
The Four Elements of the Project

1. Survey of Governments’ OER Policies and Intentions
2. Regional Policy Forums
3. The Paris Declaration
4. The World OER Congress
Fostering Governmental Support for OER Internationally

World OER Congress
Paris, 21 June 2012

Summary of 6 Regional Forums

Sir John Daniel
&
Stamenka Uvalić-Trumbić
THE TREND TOWARDS OPENNESS

- Open Source Software
- Open Access to Research
- Open Educational Resources
OPEN EDUCATIONAL RESOURCES (OER)

educational materials that may be freely accessed, reused, modified and shared.
A consortium of 13 African universities… involving 700 teacher educators.

It works across 12 African countries — by creating teacher education materials in Arabic, English, French and Kiswahili.
UNESCO HQ Paris

2002 Forum on the Impact of Open CourseWare for Higher Education in Developing Countries
2002 FORUM on the Impact of Open CourseWare for Higher Education in Developing Countries

Declaration:

Participants 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”
The World Conference on Higher Education
Paris - July 2009: *New Dynamics of HE*
Taking OER beyond the OER Community: Policy & Capacity for Developing Countries

Zeynep Varoglu

Trudi van Wyk
Fostering Governmental Support for Open Educational Resources Internationally
The Four Elements of the Project

1. **Survey of Governments’ OER Policies and Intentions**

2. Regional Policy Forums

3. The Paris Declaration

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QUESTIONNAIRE SURVEY

Responses from ~ 100 countries so far

(82 by the cut-off date of 16 April)
“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.”

Hoosen Report
WHY OER?

- Idealism
- Economics
Exploring the Business Case for OER

Prepared by Neil Butcher and Sarah Hoosen for the Commonwealth of Learning

Neil Butcher
Sarah Hoosen
The Business Case for OER

• Resource-based learning

• OER reduce costs

• Better approaches to textbooks
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.

Hoosen Report
Open Licensing

AUTHORS
• OER within copyright legislation

USERS
• Assurances & restrictions
Open Licensing

No consensus on ‘non-commercial’ restriction
World Congress on Open Educational Resources
Paris – June 20-22 – 2012

Declaration
THE AIM

“to encourage governments to promote OER and the use of open licences…

(because)

…governments will be major beneficiaries thanks to the potential of OER to improve the cost-effectiveness of their large investments in education.”
Plan

- History and Background
- Regional meetings
- Your questions
Fostering Governmental Support for OER Internationally

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1. Survey of Governments’ OER Policies and Intentions

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4. The Paris Declaration
International Advisory and Liaison Group (IALG)

Members

• At least one government chosen by each of UNESCO’s electoral groups

• IGO & NGOs:
  
  (OECD, WIPO, OER Africa, Creative Commons…)

• Co-chaired by President, COL and ADG-CI
The Paris Declaration

• Principles and aims – not implementation
• Focus on OER – not open source/access
• Avoid technical language
THE TREND TOWARDS OPENNESS

- Open Source Software

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- Open Educational Resources
The Paris Declaration

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Regional Policy Forums

- Caribbean – January
- Africa – February
- Latin America – March
- Europe – April
- Asia & Pacific – April
- Arab States - May
Project Record

Reports of Regional Forums:
www.unesco.org/oercongress
http://oercongress.weebly.com

Successive drafts of Declaration:
www.unesco.org/webworld/en/oer
http://oercongress.weebly.com

Speeches and slides:
www.col.org/speeches
10 Caribbean jurisdictions reported on the status of OER

- Antigua & Barbuda
- The Bahamas
- Belize
- Grenada
- Guyana
- Jamaica
- St. Vincent & the Grenadines
- St. Kitts & Nevis
- Trinidad & Tobago
- Cayman Islands

Barbados, January 2012

ICT in Education Leadership Forum in the Caribbean & Caribbean OER Policy Forum
“The Cyril Potter College of Education found that by taking existing OER from a variety of sources and adapting them to Guyanese needs they had greatly reduced both the cost and the time required to offer good materials to the teachers.”
Africa Policy Forum
Pretoria (February 2012)
17 African Nations reported on their Status of OER
Results of OER Survey Questionnaires (February 2012)
WCHE session on OERs

Imperative to ensure that all – developed and developing countries - are enabled to contribute to OERs…
Kwame Nkrumah University of Science and Technology

The University of Science and Technology succeeded the Kumasi College of Technology which was established by a Government Ordinance on 6th October, 1961. Following the report of a University Commission which came out early 1961, Government decided to establish two independent Universities in Kumasi at Legon near Accra. The Kumasi College of Technology was thus transformed into a full-fledged University Kwame Nkrumah University of Science Technology by an Act of Parliament on 22nd August, 1961. By another act of Parliament, Act 559 of 1998, the University has been renamed **Kwame Nkrumah University of Science and Technology**, Kumasi.
Africa Policy Forum
Pretoria (February 2012)

- Connectivity/electricity
- Sharing OER across languages
- Research on OER
- New business models to include industry
Regional Policy Forum for Latin America
March 2012
10 Latin American Nations reported on their Status of OER:

- Argentina
- Brazil
- Chile
- Colombia
- El Salvador
- Guatemala
- Mexico
- Paraguay
- Peru
- Uruguay
Regional Policy Forum for Latin America
March 2012

• Preamble: Internationally agreed statements
• Clarify and simplify
• Strategic alliances
• “Appropriate legal frameworks”
• Open licences “with restrictions as judged necessary”
Europe Regional Policy Forum
Cambridge, UK – April 2012
18 countries reported on their OER policies/intentions

Armenia  Austria  Azerbaijan
Belgium  Bulgaria  Canada
Cyprus  Finland  Hungary
Italy  Latvia  Lithuania
Malta  Monaco  Netherlands
Poland  Slovenia  USA
Europe Regional Policy Forum
Cambridge, UK – April 2012

• Longer definition of OER (earlier formulation)
• Encourage private sector and NGOs to participate
Asia – Pacific Regional Policy Forum
Bangkok – April 2012
19 countries reported on their OER policies/intentions

Australia  Brunei  China
Fiji  Indonesia  Iran
Kazakhstan  Korea  Malaysia
Mongolia  New Zealand  Pakistan
Philippines  Samoa  Sri Lanka
Thailand  Uzbekistan  Vanuatu
Vietnam
Government policies in place
‘open licensing of materials’

Australia                  China                           Korea
Indonesia                          Thailand
Intellectual Property Policy and Best Practice Guidelines
China

Video Open Courseware Project

Open Digital Learning
Resources for Continuing Education
Open Courseware Information
Strategy Plan

ISP for National OER Repository
Asia – Pacific Regional Policy Forum
Bangkok – April 2012

• Add CONFINTEA in preamble
• Open licencing does not affect authorship
• Capacity building; incentives, indigenous knowledge
• Action verbs instead of statements
Arab States Regional Policy Forum
Muscat, Oman – May 2012
11 countries reported on their OER policies/intentions:

- Algeria
- Bahrain
- Iraq
- Jordan
- Lebanon
- Morocco
- Oman
- Qatar
- Sudan
- Tunisia
- Yemen
No countries have explicit policies on OER

but

five countries have strategies relating to eEducation, eLearning or ICTs that could be extended to OER

Algeria  Bahrain  Jordan
Lebanon  Morocco
In Morocco the Ministry of Education has created a National Laboratory of Digital Resources, which is in charge of the production and labeling of digital educational resources. Some resources were produced as OER. In addition, an official ICT website of the Ministry, with a management platform for open source content "DRUPAL“, has been created.
UNESCO supports development of OER in Morocco

Within the framework of UNESCO’s programme to promote Open Educational Resources, the UNESCO Rabat Office is organizing a workshop at the Morocco-Korean Training Centre on ICT in Education in Rabat from 3 to 6 October. The workshop will focus on the use of Scenari-Opale, an editorial chain under the FOSS licence, which allows teachers to easily produce, manage and publish educational resources in various formats.

Morocco –Korean Training Centre on ICT in Education
Arab States Regional Policy Forum
Muscat, Oman – May 2012

• Add reference to Millennium Declaration in Preamble
• Add item on the need for policies and strategies
• Refer to “open standards digital formats”
Regional Policy Forums

- Caribbean – January
- Africa – February
- Latin America – March
- Europe – April
- Asia & Pacific – April
- Arab States - May
Importance of government plans

Most countries require or depend on government plans and would need to have government incentives or action plans to become active with OER.

Responses emphasize that educational materials and textbooks are provided entirely or to a great extent from public funds.
Paris Declaration on OER

- V.1 >> Caribbean Forum – Barbados, January 25
- V.1 >> Africa Forum – Pretoria, February 21-22 >> V.2
- V.2 >> Latin America Forum, Rio de Janeiro, March 28-29 >> V.3
- V.3 >> Europe Forum, Cambridge, April 17 >> V.4
- V.4 >> Asia-Pacific Regional Forum – Bangkok, April 23-24 >> V.5
- V.5 >> Arab States Regional Forum – Oman, May 7-8 >> V.6
- V.6 >> International Advisory and Liaison Group – Paris, May 11 >> V.7
World Congress on Open Educational Resources
Paris – June 20-22 – 2012

Category IV – Expert Meeting
International Advisory and Liaison Group (IALG)

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- V.5 >> Arab States Regional Forum – Oman, May 7-8 >> V.6
- V.6 >> International Advisory and Liaison Group – Paris, May 11 >> V.7

V. 7 Presented to World OER Congress, June 20-22
World Congress on Open Educational Resources
Paris – June 20-22 – 2012

The Paris Declaration
Paris Declaration on OER

1. Foster awareness and use of OER.

2. Facilitate enabling environments for the use of ICT.

3. Reinforce the development of policies and strategies on OER.

4. Promote the understanding and use of open licensing frameworks.
Paris Declaration on OER

5. Support capacity building for the sustainable development of quality learning materials.

6. Foster strategic alliances for OER.

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

8. Encourage research on OER.
Paris Declaration on OER

9. Facilitate finding, retrieving and sharing of OER.

10. Encourage open licensing of educational material produced with public funds.
The Paris Declaration

Is not legally binding but
governments use such declarations
as a guide to policy making and this
is already happening with this
Declaration on OER
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- History and Background
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1. Global trends and quality of OER

- OER characteristics in different countries or continents

- Level of OER awareness, use and application

- Is there a difference in OER among regions and countries?

What is the biggest difference?
2. Examples of OER use in educational institutes

- Is it being used in various educational fields such as primary, secondary, post-secondary, higher education or lifelong education?

- Specific case studies and their implications

- If there is none, how should it be used?

SEE HOOSEN REPORT
Survey on Governments’ Open Educational Resources (OER) Policies

Sarah Hoosen

Prepared for the World OER Congress
June 2012
3. OER contents and quality management

- What are the strategies to maintain high-quality contents (incentives for content authors)?

- Content quality management measures (screening standards and process)

- What are the things that need to be considered for the content quality management?
4. OER content copyright policies

- Are there guidelines, inspection and verification of copyrights?

- What are the standard copyright guidelines that countries and institutes follow?

- How is copyright infringement dealt?
5. OER standardization for OER collaborative service systems

- Is metadata being considered for collaborative use?

- Level of diversification in content types and categories by country

- What direction should we take for the OER standardization?
6. Improving OER content reliability

- In the case of wrong contents, what are the solutions?

- What are the measures to improve the reliability?
THANK YOU

For text and slides:
www.sirjohn.ca