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SUMMARY OF THE 6 REGIONAL POLICY FORUMS

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"Fostering Governmental Support for OER Internationally"

Stamenka Uvalic-Trumbic

Your Excellencies, Distinguished Delegates, Ladies and Gentlemen: Good afternoon!

As Sir John said in his presentation yesterday, an important element of the preparation for this Congress was the holding of six regional Policy Forums in all parts of the world as part of our UNESCO-COL project *Fostering Governmental Support for OER Internationally.*

Although the questionnaire survey was very useful, we also wanted to promote dialogue between government policy makers and OER practitioners around the world.

These forums provided a complement to the information obtained through the survey, allowed us to learn about the state of play with regard to OER in different parts of the world and to refine the draft Declaration that is before this Congress in a highly iterative way.

Before and after the regional forums there were meetings of the International Advisory and Liaison Group created for the project. The Group consists of representatives from each of UNESCO's regional electoral groups as well as of a number NGOs and IGOs.

A first draft of the Declaration was produced after the first meeting of the IALG, following three general principles.

First, the Declaration is at the level of principles and aims rather than the detail of their implementation, which will vary widely by country. Second, it is focussed tightly on OER rather than including the other aspects of openness, notably open source software and open access to research literature. Third, the Declaration avoids technical language.

We shall now try to give you the flavour of the discussions at the Regional Forums taking it in turns to describe each one. We held regional forums in Barbados for the Anglophone Caribbean, Pretoria for Africa, Rio de Janeiro for Latin America, Cambridge, U.K. for Europe and North America, Bangkok for Asia-Pacific and finally Muscat for the Arab States.

We 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. We judge them all to have been extremely successful.

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

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

Let me begin with the first Regional Forum, which 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. 10 Caribbean jurisdictions reported on the status of OER. 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.

It was interesting to learn that the Cyril Potter Teachers Training College in Guyana had developed materials on ICTs for teachers by using existing OER from around the world. The faculty members involved had found this a rewarding experience.

There was a brief discussion of the Declaration but no substantial changes were proposed.

Sir John Daniel

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

17 African countries 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.

From Africa the major changes to the Declaration 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.

Stamenka Uvalic-Trumbic

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. The Latin American meeting was particularly helpful in refining the draft Paris Declaration on OER.

It refined the text to refer to internationally agreed statements in the Preamble, clarify terms, refer to strategic alliances and qualify open licences "with such restrictions as judged necessary". Countries in the region had differing views on what restrictions should be used.

Sir John Daniel

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.

Europe added an action item about encouraging private and non-governmental organizations to contribute to OER.

Stamenka Uvalic-Trumbic

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.

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.

Sir John Daniel

Finally, in May, the Government of Oman hosted our Regional Policy Forum for the

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, Jordan, Lebanon and Morocco. Morocco is particularly active. It has agreements with UNESCO and Korea to support this work.

In Oman a reference to the Millennium Declaration was added to the Preamble, and a new item on the need for governments to develop OER policies and strategies was added.

Stamenka Uvalic-Trumbic

That is a very brief summary of the tremendously rich and interesting presentations made at these six regional forums.

It became abundantly clear through these Forums that it is very important for governments to take an active role in promoting OER. The 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.

The final step in bringing a draft Declaration to this Congress was a meeting of the International Advisory and Liaison Group, which reviewed and refined the draft that had resulted from the six policy forums. This is the version that you have in your document package.

The most important revision introduced by the IALG concerned the status of this Congress. In UNESCO terms, this is a Category IV meeting, at expert level. Such meetings usually include both experts and government representatives but are not governmental meetings. The participants at Category IV meetings are considered to be there in a personal capacity.

The practical consequence is that the Declaration begins "We, the participants…" and continues to make a call for action by governments. This has no legal force for governments, which are free to follow it up in whatever way they judge appropriate through the formal processes of UNESCO and elsewhere.

Although Declarations from Category IV meetings are not legally binding, experience with similar declarations in the past shows that governments often use them as guidance for their policy making at country level.

The International Advisory and Liaison Group is also acting as the Drafting Group at this Congress. It will meet tonight to review all suggestions that have been given in writing after its last meeting and at this Congress. It will produce a draft for adoption by participants at tomorrow's closing plenary session.

We hope this presentation has been helpful, not least in outlining the very thorough iterative process, involving both governments and OER practitioners in all areas of the world, through which the Declaration before you has been developed.

Finally, let us remind you that that purpose of this project and this Declaration is to encourage governments to promote OER and the use of open licences.

On behalf of the UNESCO-COL project team we thank you for your attention.

Thank you