Towards a Global Policy for Open Educational Resources: The Paris OER Declaration and its Implications

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White Paper, Version 0.2

Introduction

The OER World Congress organized by UNESCO has adopted the Paris Declaration in June 2012. The Declaration shows the importance of Open Educational Resources and gives recommendations to governments and institutions around the globe. In this document, we will briefly give an introduction to OER and reflect on the main recommendations as well as propose implementation actions for governments as well as institutions. The document is a living document also documenting progress and further suggestions by stakeholders. It aims at contributing potential solutions to:
1. support the implementation of the Paris OER Declaration
2. enable and support collaborative actions
3. analyse opportunities and barriers for a successful implementation of the Paris Declaration in order to provide guidance for policy makers in governments, institutions and organisations
4. develop action alternatives as a basis for policy building and policy implementation

We are looking for feedback and open consultation towards these objectives in any way!

What are Open Educational Resources?

In the following, we will give a brief introduction about the problem: What are Open Educational Resources (based on Pirkkalainen & Pawlowski, 2010)? What are current issues regarding adoption around the globe?

Ten years ago, UNESCO defined Open Educational Resources (OER) as "technology-enabled, open provision of educational resources for consultation, use and adaptation by a community of users for non-commercial purposes" (UNESCO, 2002). However, OERs are not always altruistic or non-commercial; and lately their role in innovation and economic development have been more highlighted (OECD, 2007). In principle, OER just mean that they are freely accessible and re-usable under different licensing conditions. We define OER as "*Any digital resource which can be freely accessed and used for educational purposes*". This broad definition includes a lot of different objects, such as digital learning resources, software tools like wikis or authoring systems, simulations or animations, electronic textbooks, but also lesson plans or records of experiences shared. The main aspect is that the object is usable to improve education. The following classification shows parallels to other initiatives:

- **Learning resources:** Currently, the main research field is how to make learning objects (specific digital objects created for learning purposes) available and re-usable. This includes multimedia documents, simulations but also simple html web resources.
- **Articles, textbooks and digital equivalents:** This class of resources contains typical objects provided by libraries, such as articles, papers, books or journals. When becoming freely available, this class of objects is connect to the concept of Open Access (Björk, 2004, Bailey, 2005).
- **Software tools** are used for different purposes, such as producing / authoring learning resources but also for communication and collaboration. Objects of this class are usually referenced as Open Source or Free Software (Raymond, 1999).
- **Instructional / didactical designs and experiences:** Educators are highly dependent on successfully planning and designing their learning experiences – this class of resources includes access to instructional designs, didactical plans such as lesson plans, case studies or curricula. It also includes one of the most valuable resource: sharing experiences about materials and lessons between colleagues. This class of objects is also called Open Educational Practices.
- **Web assets:** This class of objects regards simple resources (assets) like pictures, links, or short texts which are not usable on their own in a learning context but can be used to support or illustrate a certain topic. In many ways, these are objects found by google or similar search engines.

The concept of OER seems promising, potentially leading to educational collaborations, reducing cost for education, allowing access to education. However, the awareness on OER opportunities is still low. This is the case for the user level as well as for the policy level (see also Clements & Pawlowski, 2012). Therefore, it is important to promote OER to governments as well as institutions – so, how will the Paris Agenda change OER practices and policies?

The Paris Declaration Explained: Implications and Actions

In 2012, UNESCO has launched the biggest international event for Open Education, the OER World Congress[1] aiming at creating awareness on policy, governmental, institutional and user level. The main outcome was a global recommendation to governments and institutions, the Paris Declaration (UNESCO, 2012)[2].

The OER World Congress as the highest level of UNESCO events was prepared in "Regional Policy Forums" in Asia, Europe, Latin America, Caribbean, Africa, and the Middle East as well as certain special events. Another preparation meeting was co-organized by the project OpenScout focusing on international aspects of OER at the World Summit on the Information Society (WSIS) in Geneva[3]. The main outcome was a set of recommendations (Pawlowski et al, 2012) which also influenced the final Declaration, especially regarding international collaborations and accessibility.

In the following, I will discuss the declaration (items a-j in the frames, from UNESCO, 2012). For each item, I will elaborate briefly on the implications for policy makers and propose action items. These can be used for discussing policy development, setting priority areas and create an action plan for implementing the Paris Declaration.

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a. Foster awareness and use of OER. Promote and use OER to widen access to education at all levels, both formal and non-formal, in a perspective of lifelong learning, thus contributing to social inclusion, gender equity and special needs education. Improve both cost-efficiency and quality of teaching and learning outcomes through greater use of OER.

Implications for Governments
1. A strategy needs to be developed for including OER as an alternative to traditional and commercial learning materials for formal and non-formal education. This means that decision makers in governments, ministries and administrative bodies need to be informed what is available and possible. A policy should enforce that OER are always considered as an alternative.
2. Access to OER should be widened throughout society, in particular for special needs education as well as marginalized groups towards social inclusion.
3. Furthermore, it is not possible to assess quality with traditional quality assurance mechanisms as OER are rapidly changed and developed. Therefore, user-centered quality mechanisms are necessary to allow the community to ensure quality (e.g. through peer-reviews, commenting, rating).

Action Items
1. Provide OER workshops for decision makers at all levels of the educational system in each country

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[1] http://www.unesco.org/new/en/communication-and-information/events/calendar-of-events/events-websites/world-open-educational-resources-congress/

[2] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/Events/Paris%20OER%20Declaration_01.pdf

[3] http://groups.itu.int/wsis-forum2012/Agenda/DraftAgenda.aspx?se=42124

2. Develop a policy to include OER as an alternative in public procurement processes
3. Provide and validate learner-centered quality mechanisms for OER
4. Set up studies to validate cost-efficiency of OER in different domains
5. Provide partnerships with accessibility and social inclusion projects and initiatives to create

b. Facilitate enabling environments for use of Information and Communications Technologies (ICT). Bridge the digital divide by developing adequate infrastructure, in particular, affordable broadband connectivity, widespread mobile technology and reliable electrical power supply. Improve media and information literacy and encourage the development and use of OER in open standard digital formats.

Implications for Governments
1. Develop enabling technical infrastructures – it is, however, important to develop those considering their use in learning, education and training. Thus, one should consider how OER can support the infrastructure development process (e.g. for training user, teachers, technicians) as well as how the infrastructures can enable access to OER. The pedagogical / usage planning must be done always in parallel as the infrastructure alone will not contribute towards better education.
2. Support use of open formats – a policy should be developed promoting open formats enabling easy access to OER that can be, modified and used in different contexts
3. Provide strategies for basic OER literacy – it is necessary that communities know how to use OER (e.g. access, learning, assessment /recognition).

Action Items
1. Identify how OER can be included in educational infrastructure projects
2. Create policies on open formats
3. Create an OER "driving license" or similar schemes to promote OER literacy

c. Reinforce the development of strategies and policies on OER. Promote the development of specific policies for the production and use of OER within wider strategies for advancing education.

Implications for Governments
1. It is highly necessary to extend existing educational policies regarding OER. It should be assessed how OER can be incorporated when policies are revised.
2. There should be either a dedicated OER policy or inclusion in existing ones.

Action Items
1. Assess policies on education, lifelong learning, Higher Education as well as related policies
2. Consider a dedicated OER policy related to and implementing the Paris OER Declaration

d. Promote the understanding and use of open licensing frameworks. Facilitate the re-use, revision, remixing and redistribution of educational materials across the world through open licensing, which refers to a range of frameworks that allow different kinds of uses, while respecting the rights of any copyright holder.

Implications for Governments
1. Licensing frameworks and Intellectual Property Rights policies play a major role in how sharing of educational resources is done in different constituencies. This should be analysed in view of the Paris Declaration.

2. Different government sectors may have conflicting views on IPR and licensing related to educational resources. All parties are served by a better understanding of open licensing and the rights of the copyright holder.

Action Items
1. Existing policies on intellectual property rights should be analysed and updated to clarify the role of open licensing frameworks in national policies.
2. Inconsistencies in government policies on the applicability of open licences should be analysed and solved.

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e. Support capacity building for the sustainable development of quality learning materials. Support institutions, train and motivate teachers and other personnel to produce and share high-quality, accessible educational resources, taking into account local needs and the full diversity of learners. Promote quality assurance and peer review of OER. Encourage the development of mechanisms for the assessment and certification of learning outcomes achieved through OER.

Implications for Governments
1. It is necessary to develop training programs for OER usage and adaptation for different levels – it would be useful to partner with organization such as UNESCO or Commonwealth of Learning to coordinate training materials which can be easily localized.
2. Quality mechanisms need to be developed for easy and dynamic quality assurance. For this purpose, educators also need to be aware and competent regarding quality issues, training materials and other support services. Awareness is key here as well.

Action Items
1. Create awareness and training materials for OER as well as quality in coordinated actions – create materials that are easy to localize.

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f. Foster strategic alliances for OER. Take advantage of evolving technology to create opportunities for sharing materials which have been released under an open license in diverse media and ensure sustainability through new strategic partnerships within and among the education, industry, library, media and telecommunications sectors.

Implications for Governments
1. Strategic partnerships are a necessity for successful OER adoption. This is valid for partnerships within a country (e.g. between schools, publishers, content providers, technology providers, between countries (e.g. teaching collaborations) as well as for development work (North-South collaborations)
2. Self-sustainable communities which work on resource improvement, quality assurance and experience sharing should be encouraged

Action Items
1. Create an OER partnership between public and private entities working towards forming a common interest group
2. Develop North-South development partnerships with selected countries
3. Encourage educational organizations to utilize their existing partnerships to promote collaborative teaching and training.

g. Encourage the development and adaptation of OER in a variety of languages and cultural contexts. Favour the production and use of OER in local languages and diverse cultural contexts to ensure their relevance and accessibility. Intergovernmental organisations should encourage the sharing of OER across languages and cultures, respecting indigenous knowledge and rights.

Implications for Governments
1. OER should be considered as a strong instrument when designed in a smart way in multi-lingual and multi-cultural versions.
2. For this, it is necessary to involve different communities of educators who take ownership (and thus maintenance and improvement) of specific OER.

Action Items
1. Create models and guidelines for cultural / language adaptation for OER
2. Involve communities of educators.
3. Focus on OER development to allow and promote diversity

h. Encourage research on OER. Foster research on the development, use, evaluation and re-contextualisation of OER as well as on the opportunities and challenges they present, and their impact on the quality and cost-efficiency of teaching and learning in order to strengthen the evidence base for public investment in OER.

Implications for Governments
1. There has been a lot of research on OER around the globe, in particular in Europe. It is necessary to strengthen the dissemination those results. Based on this, research gaps need to be identified. These should be addressed in European, regional and national research programs

Action Items
1. Create a common knowledge base on OER research
2. Set up programs for research on OER

i. Facilitate finding, retrieving and sharing of OER. Encourage the development of user-friendly tools to locate and retrieve OER that are specific and relevant to particular needs. Adopt appropriate open standards to ensure interoperability and to facilitate the use of OER in diverse media.

Implications for Governments
1. A lot of R&D efforts have been done in the past years to support search, retrieval, re-use and re-publishing of OER, e.g. through federated repositories and the web. Research in this direction should be encouraged.
2. Furthermore, interoperability is a must to create access to OER. Thus, standards must be used and – when not available – developed.

Action Items
1. Promote use of easy-to-use tools for OER search, modification and sharing.
2. Provide a recommendation for use of standards in educational projects.
3. Support standards development and implementation

j. Encourage the open licensing of educational materials produced with public funds.
Governments/competent authorities can create substantial benefits for their citizens by ensuring that educational materials developed with public funds be made available under open licenses (with any restrictions they deem necessary) in order to maximize the impact of the investment.

Implications for Governments
1. Open Licenses are a prerequisite for OER. However, awareness and knowledge is rather low even though there are simple schemes (e.g. Creative Commons). It is necessary to increase awareness and knowledge on licensing options.
2. Furthermore, access to publicly funded materials and results should be open to interested parties. Thus it is necessary to provide a policy on licensing schemes for public projects and procurement

Action Items
1. Use open licenses for public funded learning materials
2. Provide guidelines for open licensing for educational institutions

Summary

The Paris OER Declaration can be a big step forward towards access to education. However, as it is not a binding document, it is necessary that governments engage and commit to integration the recommendations into national and regional policies.

This document is a starting point for developing policies and prioritizing actions. The action items can be a starting point for governments to determine necessary implementation steps and create action plans. As this process gathers momentum, the OER movement will create great synergies for access, collaborations and quality of learning, education and training.

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