

# 2<sup>ND</sup> WORLD OER CONGRESS 2017

## DRAFT OUTCOME AND RECOMMENDATIONS

### *Introduction*

Open Educational Resources (OER) are any type of educational materials in the public domain, or released with an open license that allow users to legally and freely use, copy, adapt, combine and share. OERs present a strategic opportunity to improve the quality of education as well as facilitate policy dialogue, knowledge sharing and capacity building.

The theme of the 2nd World OER Congress “OER for Inclusive and Equitable Quality Education: from Commitment to Action”, reflects the pivotal role OER can play toward achieving the 2030 Agenda for Sustainable Development, Sustainable Development Goal 4 on Quality Education.

The 2<sup>nd</sup> World OER Congress is organized by UNESCO and the Government of Slovenia, with the generous support of the Government of Slovenia and the William and Flora Hewlett Foundation. The objectives of the 2nd World OER Congress are to:

- examine solutions to meeting the challenges of mainstreaming OER practices into education systems worldwide;
- showcase the world’s best practices in OER policies, initiatives and experts; and,
- identifying recommendations that are demonstrably best practices for the mainstreaming of OER.

This document aims to examine solutions to mainstreaming OER in support of Sustainable Development Goal-4 (“Quality Education”).

In preparation for the 2<sup>nd</sup> World OER Congress, six Regional Consultations and a survey on OER have been organized by the Commonwealth of Learning (COL) in close cooperation with UNESCO and the Government of Slovenia, and the generous support of the William and Flora Hewlett Foundation. These Regional Consultations were organized thanks to the support of the national authorities in the six host countries. The six sessions were held in:

- Kuala Lumpur, Malaysia (Asia Regional Consultation, 1-2 December 2016);
- Valletta, Malta (Europe Regional Consultation, 23 – 24 February 2017),
- Doha, Qatar (Arab States Regional Consultation, 27- 28 February 2017),
- Port Louis, Mauritius (Africa Regional Consultation, 2-3 March 2017)
- Sao Paulo, Brazil (Americas Regional Consultation, 3 – 4 April 2017); and
- Auckland, New Zealand (Pacific Regional Consultation 29 – 30 May 2017).

The regional consultations and the survey have built awareness on the objectives of the 2<sup>nd</sup> World OER Congress and identified the status of national and regional implementation of the [2012 Paris OER Declaration](#).



## Context

The Universal Declaration of Human Rights states that all people have basic inalienable rights and fundamental freedoms that include the right to receive and impart information and ideas through any media and regardless of frontiers (Article 19), as well as the right to education (Article 26).

In 2015, the United Nations adopted the 2030 Sustainable Development Agenda with 17 goals (SDGs). Goal 4 calls on the international community to “Ensure inclusive and equitable quality education and promote lifelong opportunities for all”. UNESCO is responsible for pursuing this goal based on the [Incheon Declaration and Framework for Action \(2015\)](#) UNESCO has a comprehensive mandate, based on SDG 4, to promote OER to play a more prominent role at all levels of education, from K-12, to technical and vocational education and training, to higher education.

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The Global Education Monitoring Report (GEM) 2016 underlines three main imperatives for achieving SDG 4.

- It points to the urgency for new approaches, recalling that on current trends only 70% of children in low income countries will complete primary school by 2030; a goal that should have been achieved in 2015. It recalls that strong political will, policies, innovation and resources from Member States are required to reverse this trend.
- It flags the need for a heightened urgency for action with long-term commitment. Failure to do so will not only adversely affect education but will hamper progress towards all development goals.
- It underscores that education has a responsibility to foster the type of skills, attitudes and behaviour that will lead to sustainable and inclusive growth. This means reaching out beyond traditional boundaries and creating effective partnerships.

The message of the Global Education Monitoring Report 2016 is clear: the global community must mobilize strategically with new approaches in order to meet the unprecedented challenges of attaining SDG 4. OER, which represents an innovation for sharing knowledge to support quality lifelong learning opportunities, is a powerful tool to this end.

## ***Recommendations for Mainstreaming OER in support of SDG4***

Challenges remain that hinder the mainstreaming of OER by the global educational community. While advances have been made, awareness of OER has spread faster than its implementation. Increased efforts by the international community are still necessary. These challenges are: 1) the capacity of users to access, re-use and share OER; 2) issues related to language and culture; 3) ensuring inclusive and equitable access to quality OER; 4) changing business models; 5) the development of supportive policy environments.

Possible solutions for overcoming these challenges are as follows:

### **1. Capacity of users to access, re-use and share OER**



To be able to use OER, educational stakeholders (policy makers, educators, students, librarians) need the capacity to be able to find, use, modify and share materials created under an open license. Furthermore, user-friendly tools to locate and retrieve OER need to be mainstreamed to facilitate the use of OER.

In this regard, the following solutions maybe recommended:

#### *Awareness and skills to use OER*

- a) Key educational stakeholders (teachers, teacher trainers, educational policy makers and librarians) should be provided with capacity building to raise awareness on how OER can enhance teaching and learning.
- b) Systematic and continuous capacity building (in-service and pre-service) on how to find, modify, create and share OER should be an integral part of teacher training programmes. This would include capacity building on digital literacy to identify, share and use OER. The support of governments, educational institutions and teacher associations for this is important.

#### *Sharing OER*

- c) Legal frameworks of educational institutions should support the development and use of OER by teachers.
- d) There should be a support for the creation of peer networks of educational providers sharing OER (based on areas such as subject matter, language, institutions, regions, level of education *et cetera*).
- e) Professional assessment frameworks for teachers and other educational stakeholders should include recognition and reward for using, creating and sharing OER and staying active in OER networks.
- f) A 360° continually updating function should be introduced that allow OER creators to inform users on updates as well as users to suggest updates and modifications of OER.
- g) Institutions and/or teachers should aim to use OER-based teaching materials as an integral rather than as a peripheral element of curriculum.

#### *Finding OER*

- h) Indexing of OER resources (including in national OER repositories) should be further developed to support the identification of existing OER.
- i) OER repositories should have clear action plans with performance indicators to encourage goals such as accessibility, interoperability with other repositories, usage and sustainability.
- j) Effective meta-analysis and data mining practices should be encouraged for OER retrieval.



*Examples of good practice:* (this section will be developed through online feedback and in collaboration with members of global OER community)

## **2. Language & Cultural issues**

OER made available in diverse languages and adapted to the related cultural context where it is used is vital for uptake in local contexts. Furthermore, for OER to be used by educational systems, issues related to the sharing and accepting of knowledge from different sources need to be addressed.

Possible solutions for overcoming these challenges are as follows:

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### *Language Issues*

- a) Empower main stakeholders (e.g. teachers, teacher trainers) to develop culturally and linguistically relevant OER and/or the creation of local language OER (particularly in languages other than English) as well as content appropriate to local cultures.
- b) Harness technologies that overcome the language barrier such as online translation systems.

### *Cultural Issues*

- c) Developing culturally sensitive OER locally should be encouraged and promoted by institutions and governments.
- d) Developing OER about local heritage and cultures should be encouraged and promoted by institutions and governments.
- e) Training on the contextualization of content by the educational community (subject-matter experts and language editors) should be encouraged and promoted by institutions and governments.
- f) Capacity building for the contextualization and localization of OER should be systematically included in teacher training programmes on OER.
- g) Institutions should have policies on culturally-sensitive resources.
- h) Support should be provided for the collaborative development of OER, which facilitates stakeholders to join efforts for the production of digital collections at multiple educational institutions located in different communities, cities or countries of the world

*Examples of good practice:* (this section will be developed through online feedback and in collaboration with members of global OER community)



### **3. Ensuring inclusive and equitable access to quality OER**

OER needs to be accessible to all learners, including those who have disabilities, those that are economically disadvantaged and within a framework that ensures gender equity. Electricity and connectivity remain challenges in many parts of the world. For this reason, it is important that it is possible to find/use/modify and share OER using diverse ICT environments, including on mobile devices, or even to the extent possible, off-line. Furthermore, in order for OER to be used with confidence by the educational community mechanisms to ensure confidence of the quality of resources should be in place.

Possible solutions for overcoming these challenges are as follows:

- a) Providing alternative access to digital textbooks by providing printed hard copies.
- b) OER should be made available in accessible formats to support its use by persons with disabilities.
- c) Making OER available on mobile devices, and developing mechanisms for allowing for their modification and sharing on mobile devices.
- d) Formats (e.g., speech software) need to be compatible with the context (e.g., language) to support the production of quality resources.
- e) There should be institutional commitments to ensure equitable access.
- f) Collaborate with bandwidth providers through Public Private Partnerships (PPP) to provide increased access;
- g) Ensure systems for peer-review quality control of OER
- h) Include OER in regular quality assurance mechanisms used for all educational resources of an institution

*Examples of good practice:* (this section will be developed through online feedback, dialogue and collaboration with the members of global OER community)

### **4. Changing Business Models**

Globally, the traditional business model for commercial textbook publishing has come under economic pressure to evolve because of the technological development and the digitization of content. The changes experienced by the publishing industry are affecting its market paradigms and business models (Rodrigues, Chimenti, Nogueira, Hupsel, & Repsold, 2014). There is a need to identify innovative solutions and develop new business models, so that the interests of the OER community and educational publishers are addressed.

Possible solutions for overcoming these challenges are as follows:



- a) Research to breakdown the basic components of an OER business model, eg. costs of creating OER, training of trainers, awareness campaigns, teaching and learning materials for inclusiveness (Braille, translation costs), in order to identify which parts of this model can be provided for free, and which can be used to fund OER for learners.
- b) Facilitate learning outcome based models, e.g. courses are provided for free but course completion certification has a fee.
- c) Facilitate OER-based institutions and staff to offer consultation and services to other institutions developing OER.
- d) Charging for hard copies of OER materials, use of paid advertisements, and other means for income generation to sustain OER-based education.
- e) Encourage and facilitate a peer collaboration model for OER development.
- f) Publishing companies can release educational content on open licenses as part of social corporate social responsibility activities.
- g) When revising or developing textbooks, mandate for open licensing of all public expenditure in education, encouraging commercial participation in open-licensed tenders.
- h) Open business models of institutions should reward and incentivize that support teachers as creators and revisers of content.

*Examples of good practice:* (this section will be developed through online feedback, dialogue and collaboration with the members of global OER community)

### **5. Development of supportive policy environments**

Mainstreaming of OER requires the creation, adoption, and implementation of policies supportive of effective OER practices. In this regard, funding flows are more likely to follow from policy directives, and policies can be applied for both bottom-up and top-down approaches.

Possible solutions for overcoming these challenges are as follows:

- a) The development of policy initiatives at governmental and institutional levels will facilitate OER mainstreaming. Furthermore, OER policies taken at the governmental level will benefit and support OER policies taken at the institutional level.
- b) Policies that support awareness raising on the benefits of OER; funding for evidence-based research; incentives for following good practices; and the fostering of supportive strategies and practices to support the use of OER by the educational community.
- c) To help ensure that stakeholders follow policy guidelines, discretionary funds could provide incentives to teaching staff to publish in OER repositories.
- d) Governmental and institutional vision and mission statements should include declarations concerning OER.



- e) Policies could be made strategic by demonstrating how OER aligns with and benefits other development priorities, partnerships and commitments: including the 2030 Agenda for Sustainable Development.
- f) Research that demonstrates the savings through OER, including through comparative analyses of costs and success in other contexts, can be useful for supporting OER policy development and implementation.
- g) Policies which build upon familiar language and experiences can provide a means for ensuring greater understanding and implementation outcomes.
- h) Verification and auditing mechanisms as well as evaluation frameworks for policies are key instruments to monitor and finetune the implementation of OER.
- i) Policies which recognize OER's contribution to knowledge creation, similar to the publication and sharing of research, provide institutions with strong incentives for the adoption of OER .
- j) Governments should have policies for OER in relation to the use of public funding.

*Examples of good practice:* (this section will be developed through online feedback, dialogue and in collaboration with the members of global OER community)

## **Conclusion**

OER provides vast new opportunities to improve learning outcomes, reduce costs, facilitate effective sharing, and improve the quality of teaching: all needed to support achievement of SDG 4. If embedded at the core of educational systems, OER use offers an innovative and cost-effective means to achieve the SDG 4 targets for ensuring quality education through the key pillars of access, equity and inclusion.

