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# OPEN EDUCATIONAL RESOURCES

## CONVERSATIONS IN CYBERSPACE

Edited by **SUSAN D'ANTONI**  
and **CATRIONA SAVAGE**



Education on the Move series



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Conversations in cyberspace**

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## Section 4.

# Priorities for action

*At the end of the first forum in 2005, participants were asked to specify the three most important issues for promoting and enabling the OER movement. The responses formed the basis of an eventual classification of fourteen priorities. As the two-year UNESCO-IIEP project drew to a close in mid-2007, members of the community were invited to consider the list and to select and rank the five most important issues for advancing the OER movement, as well as the stakeholders who should be engaged.*

*This exercise provided a moment of reflection for a group whose members had been actively or passively engaged in a series of interactions over a period of more than a year and a half. More than half responded. Given the size and geographic representation of the community, its consensus on key priorities is important input to the Open Educational Resources movement – to inform future thinking, planning and action.*



## Chapter 11

# OPEN EDUCATIONAL RESOURCES: THE WAY FORWARD

Susan D'Antoni

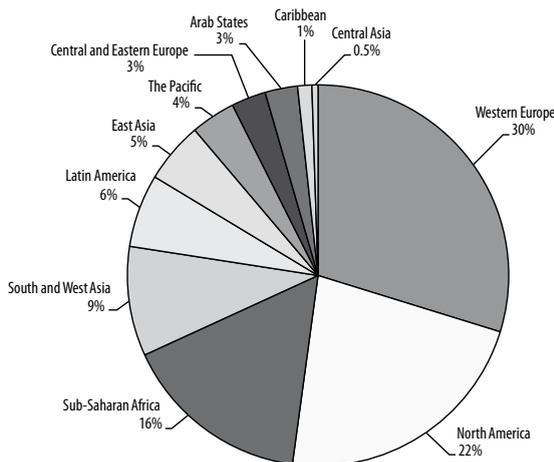
## 1. INTRODUCTION

After a period of intense discussion on OER, it could be expected that the community would have formed an opinion on which constitute the priority issues for advancing the OER movement, and on which stakeholders should take the lead.

It should be remembered that, at the time of the survey, the community united a large number of individuals from a wide range of organizations, as well as different geographic regions: over 620 members, representing 98 UNESCO Member States, of which 67 were developing countries (Figure 11.1). Although geographic representation in the community was not perfect, roughly half of the members were from developing countries – an important balance as the community reflected upon an initiative that seeks to equalize access to knowledge worldwide.

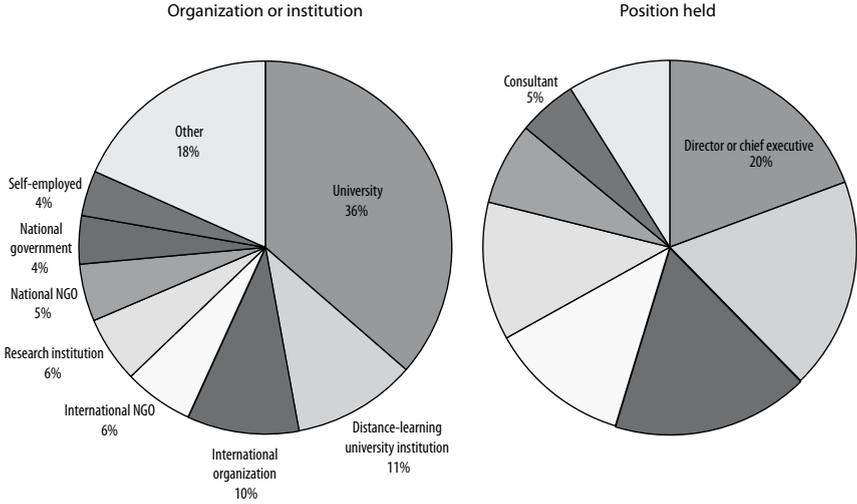
More than 50 per cent of the community members took the time to reflect on the list of issues and to specify their own priorities. The respondents mirror almost exactly the geographic representation of the full community. They represent a fairly wide range of organizations, although over half come

**Figure 11.1.** OER community members by region



from universities and distance learning institutions. Many hold high-level positions in their organizations, either as head or senior official or manager. Teachers, researchers and project officers also constitute an important number (Figure 11.2). This profile means that this collective priority-setting exercise largely reflects the perspective of the educator and the institution.

**Figure 11.2.** Occupational profile of respondents

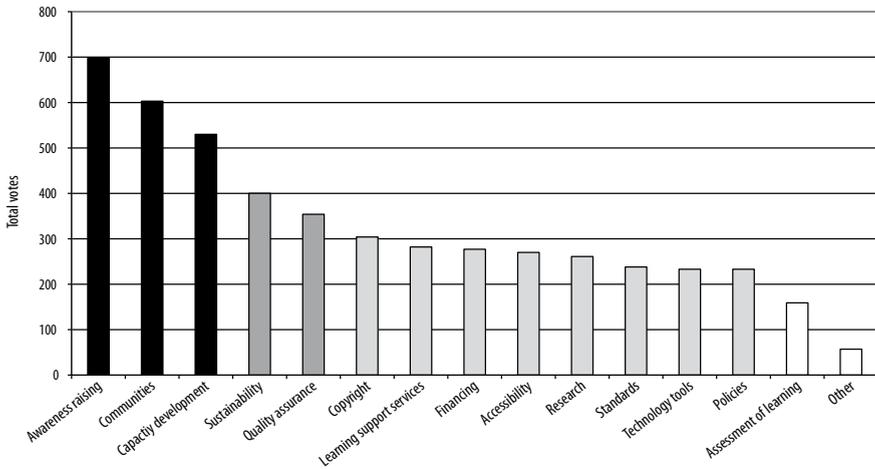


## 2. THE PRIORITY ISSUES

The five most important issues<sup>92</sup> stand out clearly, with a sixth that deserves attention (Figure 11.3).

*Awareness raising and promotion* and *communities and networking* emerged as the main priorities for promoting the advancement of the OER movement. Third-ranked *capacity development* is essential to enabling creation and reuse of OER, while the fourth issue, *sustainability*, points to the importance of ensuring that OER initiatives find their way into existing and new approaches to extending flexible learning opportunities and knowledge sharing. The flagging of *quality assurance* raises a concern, one that reflects the broader issue of accessing information on the web. Without the control processes of the publishing industry and the selection process of the library or resource centre, users may be on their own in determining the quality of a resource. The very

92 Weighted by priority assigned by respondent – that is, an issue ranked as first priority was weighted 5, second priority as 4, third as 3, fourth as 2 and fifth as 1.

**Figure 11.3.** Priority issues in rank order

openness of access to OER means that the traditional structures of education systems which support and protect the learner may be absent.

The sixth issue, *copyright and licensing*, is of growing concern. Resources intended for release as OER, but which contain copyrighted material, pose a problem. Either copyright clearance must be obtained, or the material must be replaced or eliminated. Furthermore, the license assigned to educational resources determines the degree to which they may be openly and freely used. Alternate open licenses have been developed (such as those from Creative Commons), and their use is growing. Developers and users would benefit from guidance to help them better understand the implications of the license they select for their materials or that has been applied to the materials they wish to use.

### Priorities of developed and developing country respondents

Since different countries have different situations and face different challenges in considering creation and reuse or adaptation of OER, the information collected was broken down in several ways. First, developed and developing countries were separated,<sup>93</sup> which revealed differences in priorities, as can be seen in Table 11.1.

While *awareness raising* remains the highest priority for both groups, issues such as *sustainability*, *accessibility* and *copyright*, for example, are ranked

93 See UNESCO Institute for Statistics (2006) for developed and developing country classifications.

**Table 11.1.** Priority issues for developed and developing country respondents

Developed countries	Developing countries
1. Awareness raising and promotion	1. Awareness raising and promotion
2. Communities and networking	2. Capacity development
3. Sustainability	3. Communities and networking
4. Quality assurance	4. Technology tools
5. Copyright and licensing	5. Learning support services
6. Capacity development	5. Research
7. Accessibility	7. Policies
8. Financing	8. Quality assurance
9. Standards	9. Financing
10. Learning support services	10. Sustainability
11. Research	11. Accessibility
12. Policies	12. Copyright and licensing
13. Technology tools	13. Standards
14. Assessment of learning	14. Assessment of learning

quite differently. Some of the differences might be explained by current levels of creation and availability of OER in developed and developing countries. For instance, *sustainability* – in common with *copyright* and *standards* – becomes a priority when there is a critical mass of OER initiatives. On the other hand, *capacity development*, *technology tools* and *learning support services* are a priority in countries where there is currently a low level of OER development and use. Also identified as of higher priority in developing countries are *research* and *policies*. This may reflect the importance of a supportive environment for OER development in countries with very limited resources. Ensuring that OER development is an appropriate strategy for a particular country – one which suits its needs – might necessitate research; and facilitating such OER development might require an enabling policy framework.

### Priorities of different regions

Just as there are differences in priorities between developed and developing countries, there are different ranking patterns among regions (see Appendix 2). Note, however, that these patterns should be taken only as indicative, since the number of respondents from some regions was very small.

While *awareness raising* appears as a high priority for those in all regions, the ranking of *policies* varies quite a bit – from the fourth priority in Latin America and the Caribbean to the lowest priority of respondents from South and West Asia, the Pacific and the Arab States. The diversity in the

ranking of issues underlines the importance of developing regional and local communities and initiatives that will focus on local needs and conditions.

### **Priorities of respondents involved (or not) in an OER initiative**

More than half of the respondents indicated that they were involved in an OER initiative. Overall, their priorities reflect fairly closely those of the whole group of respondents, with the top three issues remaining *awareness raising*, *communities and networking*, and *capacity development*. The ranking for those involved in an OER initiative also supports the supposition that *copyright and licensing*, *sustainability* and *financing* will all move up the agenda of priority issues as OER development and use become more widespread.

Those not involved in an OER activity ranked *capacity development* as a high priority, which points to the need for ‘how to’ resources for those with no prior experience with OER.

## **3. THE LEAD STAKEHOLDERS**

For each issue ranked as a priority, respondents identified the stakeholders they felt should assume a leadership role. And, just as certain priority issues stood out, so did the lead stakeholders. Four of these were assigned significant roles, with multiple issues to take up in advancing the OER movement (see Appendix 3 for details).

### **Higher education institutions**

Given the topic under discussion, and the profile of respondents, one could have predicted that higher education institutions would be chosen as the lead organization for OER. And it was the university’s primary functions – *research* and *supporting learning* – that were cited most frequently. Yet, *awareness raising* and *capacity development* were also seen as priorities. More surprisingly, two issues that relate to the creation of OER – *copyright* and *financing* – and which demand a decision at the institutional level, were not considered to be of priority to higher education institutions. It should be noted, however, that, throughout the discussions, participants stressed the need for expert legal guidance on copyright. As for the low ranking of *financing*, it may reflect the fact that, currently, most OER initiatives are donor-financed.

### **International organizations**

International organizations were also judged to have an important role. *Copyright*, *financing* and *standards* join *awareness raising* as the issues

that should be addressed by international bodies. Standard setting is a function often undertaken at the international level. However, financing OER is a less obvious role for international organizations, and its being cited underlines the importance of the discussion of sustainable models for OER.

### **National governments**

National governments were seen as the most important stakeholder for *policy support* for OER, and for ensuring *accessibility*, which is often promoted through education policy on the one hand, and through investments on technology and infrastructure on the other. Along with international organizations, national governments were identified as the stakeholder best placed to take up the challenges of *copyright* and *financing* of OER.

### **Academics**

Academics were identified as the stakeholder group that should take responsibility for those issues related to their various roles and functions in the educational institution: namely, *research*, *learning assessment*, *quality assurance* and *learning support*.

### **Other stakeholders**

The remaining stakeholders were assigned leadership in those issues most clearly related to their missions and functions. For example, grant-making organizations and higher education funding bodies could take up the challenge of *funding* initiatives, while regulatory bodies could take responsibility for *quality assurance* of OER.

Finally, it should be noted that an important role for stakeholders was identified: that of championing OER. Clearly, any or all of the stakeholders could decide to champion OER (as has the Hewlett Foundation). What is important is that effective champions continue to step forward for OER. For, every movement, in order to succeed, must have its champions; and this is particularly so at the beginning.

## **4. THE WAY FORWARD**

Through its deliberation on the key issues and the lead stakeholders, the international community on OER has sketched out a way forward for the movement, as well as for its own actions.

## Advancing the movement

### *First priority: Awareness raising*

If OER is to contribute to increasing access to knowledge worldwide, it is crucial that actors – from policy- and decision-makers at all levels, to teachers and academics – be made aware of its potential, so that they will be able to make informed decisions on if, and how, it can be used in their local situation. Raising awareness of OER and its attendant issues has been the primary goal of the UNESCO-IIEP community, and it is clear that continuing and concerted awareness-raising actions must be a priority.

*Awareness raising at the international level among UNESCO Member States will continue. However, this action must also be complemented by awareness raising actions at other levels. A strategy is needed, as well as useful resources for activities such as workshops.*

### *Second priority: Communities and networking*

The strength of the OER community and the continuing adherence of its members underline the importance of this type of international forum for discussion and information sharing. Building and supporting such a community is congruent with the main functions of UNESCO: as a laboratory of ideas and a clearinghouse, a standard setter, a capacity builder in Member States, and a catalyst for international cooperation. Nonetheless, an international community functions under certain constraints, such as operating in one language and necessarily focusing on topics of general concern. Both awareness-raising and capacity-development action would be strengthened by decentralized activities complementary to those of the international community.

*Regional, linguistic and topic-specific communities will complement and extend the initial activities of the international OER community. UNESCO will promote the development of a loose network of regional, linguistic or topic nodes that can support appropriate regional or local action, while maintaining contact at the international level through the community on OER.*

## Enabling creation and use

### *Third priority: Developing capacity*

Individuals and institutions interested in creating or adapting and reusing OER need support to help them develop their capacity to do so. One of the interactions of the community focused on the elaboration of a 'Do-It-

Yourself/Do-It-Together’ resource that would serve this function.<sup>94</sup> Such a resource was seen as particularly important to promote OER creation and use in developing countries.

*A Do-It-Yourself/Do-It-Together resource should be developed to enable active engagement in the OER movement.*

#### **Fourth priority: Quality assurance**

If the OER movement is to take hold widely, the resources must be – and be seen to be – of high quality. When information is taken from web sites worldwide, the user often lacks a frame of reference for determining the quality of the information being accessed. The OER movement would benefit from an exploration of current international quality-assurance mechanisms and general guidelines and, potentially, from linking with existing quality-assurance agencies.

*UNESCO could establish a connection with the lead agencies for quality assurance in education on behalf of the members of the international community on OER, and promote the development of guidelines for OER quality assurance.*

### **Removing barriers**

#### **Fifth priority: Sustainability**

If the OER movement is to flourish, approaches and models are needed that will ensure the viability of OER initiatives. Currently, the majority of OER development is undertaken on a project basis, and often with donor support. If it is to be sustainable, OER must be integrated into the policies and procedures – as well as the regular budgets – of organizations.

*The discussion that has already begun to identify and consider all the options for sustainability must continue. Models must be articulated, tested and evaluated, and the lessons learned shared widely.*

#### **Sixth priority: Copyright and licensing**

Copyright and licensing is an issue that permeates the discussion and debate on creation and reuse of OER. It is an issue with important implications for both creators and users, and for their institutions. It might be expected to move up the agenda of key issues as more and more OER development takes place.

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94 See Chapter 6, pp. 97-104 for more information.

*Copyright and its implications for OER need to be explored by the OER community, and the situation clarified for the institution, the creator and the user. UNESCO will hold a discussion on the topic, with input from a panel of experts.*

## 5. A FINAL WORD OF A PERSONAL NATURE

Being involved in the coming together and consolidation of such a large and vibrant community has been a pleasure and a privilege for me. The OER community has a very special character: its composition, as well as the nature and shape of its exchanges, give it a character every bit as distinct as that of a colleague or a friend. This community is wonderful in its thoroughly energetic thought and action, as colleagues can be – and it is cherished in the way that friends can be.

The internet and the web offer opportunities for interaction with tremendous potential for an organization such as UNESCO, with its mandate for advice and action worldwide. International meetings, workshops and consultations are all means by which the Organization carries out its work in collaboration with Member States, but their capacity to include all those interested in the topic or activity at hand is necessarily limited. What liberty we now have to reach further and faster with the aid of the internet! True, the tool is not yet perfect for the purpose – there are many who cannot connect, but their numbers are diminishing, as are the costs associated with technology and connectivity. Over the period that the OER community has been in existence, we have been able to link far more people and institutions than would have been feasible through other means. And we have been helped in doing so by the Hewlett Foundation, with its vision of promoting equal access to knowledge worldwide.

This community came together with a bang (500 individuals joined at the beginning), and its collective energy has never flagged – a testimony to the power of such international interaction in cyberspace. I feel privileged to accompany it.

## REFERENCES

UNESCO Institute for Statistics. 2006. *Global Education Digest 2006: comparing education statistics across the world*. Montreal, Quebec, UNESCO Institute for Statistics.

## APPENDICES

### Appendix 1. Classification of priority issues for advancing the OER movement

Advancing the OER movement	
<b>Awareness raising and promotion</b>	Increasing awareness of OER through all appropriate channels and among all stakeholders, and explaining its potential and benefits.
<b>Communities and networking</b>	Linking individuals and organizations in Communities of Interest or Practice, for the exchange of information or collaborative development of resources.
<b>Research</b>	Investigation and Inquiry into OER. Any new development deserves investigation so that it is better understood.
Enabling creation and reuse of OER	
<b>Policies</b>	New approaches may demand new policies to support the creation and reuse of OER, and those who are implicated, such as teachers and learners.
<b>Standards</b>	An agreed set of criteria, some of which may be mandatory. For example, standards for licensing and metadata are needed to ensure interoperability of OER.
<b>Technology tools</b>	Software tools to facilitate the development, access and sharing of OER.
<b>Quality assurance</b>	The systematic review of OER to ensure that acceptable standards of education, scholarship and infrastructure are being maintained.
<b>Capacity development</b>	Increasing the capability of individuals, institutions and organizations to create and use OER.
Enabling learning with OER	
<b>Learning support services</b>	Online services, including forums and communities, to support and enhance learning with OER.
<b>Assessment of learning</b>	The process of evaluating knowledge, skills and competencies gained through learning with OER.
Removing barriers to OER	
<b>Accessibility</b>	The degree to which people can access and use information and communication technologies (ICTs) and, through them, access OER.
<b>Copyright and licensing</b>	The barriers to creating and reusing OER constituted by copyright (which grants the exclusive right for a certain term of years to an author to print, publish and sell copies of the original work).
<b>Financing</b>	Securing financial resources for OER initiatives.
<b>Sustainability</b>	Designing and applying models that ensure the ongoing viability of OER initiatives.

**Appendix 2. Issues ranked by order of priority: regional breakdown**

<b>Western Europe</b> <i>No. of respondents = 97</i>	<b>North America</b> <i>No. of respondents = 72</i>	<b>Sub-Saharan Africa</b> <i>No. of respondents = 54</i>
1 Awareness raising	1 Communities	1 Awareness raising
2 Communities	2 Awareness raising	2 Capacity development
3 Sustainability	3 Sustainability	3 Communities
4 Copyright	4 Capacity development	4 Research
5 Quality assurance	5 Quality assurance	5 Policies
6 Accessibility	6 Financing	6 Financing
7 Learning support services	7 Copyright	7 Accessibility
8 Capacity development	8 Research	8 Learning support services
8 Financing	9 Standards	9 Technology tools
10 Standards	10 Accessibility	10 Sustainability
11 Policies	11 Learning support services	11 Quality assurance
12 Technology tools	12 Technology tools	12 Standards
13 Research	12 Assessment of learning	13 Other
14 Assessment of learning	14 Policies	14 Copyright
15 Other	15 Other	15 Assessment of learning
<b>Latin America &amp; Caribbean</b> <i>No. of respondents = 28</i>	<b>South &amp; West Asia</b> <i>No. of respondents = 27</i>	<b>East Asia</b> <i>No. of respondents = 15</i>
1 Capacity development	1 Capacity development	1 Awareness raising
1 Communities	2 Awareness raising	2 Copyright
3 Awareness raising	3 Learning support services	3 Sustainability
4 Policies	4 Communities	4 Communities
5 Research	4 Technology tools	5 Quality assurance
6 Quality assurance	4 Accessibility	5 Capacity development
7 Financing	7 Quality assurance	7 Policies
8 Sustainability	8 Research	8 Learning support services
8 Learning support services	9 Sustainability	9 Accessibility
8 Assessment of learning	10 Assessment of learning	10 Technology tools
11 Technology tools	10 Financing	10 Financing
11 Standards	12 Copyright	12 Standards
13 Copyright	13 Standards	13 Assessment of learning
14 Accessibility	14 Policies	14 Research
<b>The Pacific</b> <i>No. of respondents = 14</i>	<b>Central &amp; Eastern Europe</b> <i>No. of respondents = 10</i>	<b>Arab States</b> <i>No. of respondents = 8</i>
1 Awareness raising	1 Awareness raising	1 Technology tools
2 Capacity development	2 Communities	2 Awareness raising
3 Quality assurance	3 Research	3 Capacity development
4 Communities	4 Standards	4 Communities
5 Copyright	5 Policies	5 Quality assurance
5 Sustainability	5 Quality assurance	5 Standards
7 Accessibility	7 Capacity development	5 Learning support services
8 Research	8 Sustainability	8 Research
8 Standards	9 Learning support services	8 Financing
10 Financing	9 Accessibility	10 Accessibility
11 Technology tools	9 Financing	11 Assessment of learning
12 Learning support services	12 Copyright	12 Sustainability
13 Assessment of learning	13 Technology tools	13 Policies
14 Policies	13 Assessment of learning	

*Note:* Issues in shaded boxes were identified as priorities by more than half of the respondents in the region.

**Appendix 3.** Priority issues for stakeholders

Stakeholder	Priority issues	% of respondents
Higher education institutions	1 Research	81
	2 Learning support services	74
	3 Awareness raising and promotion	71
	4 Assessment of learning	70
	5 Capacity development	69
	6 Quality assurance	66
	7 Sustainability	60
	7 Policies	60
	9 Standards	57
	10 Accessibility	55
	11 Communities and networking	54
	12 Copyright	51
International organizations	1 Awareness raising and promotion	75
	2 Copyright	69
	3 Financing	66
	3 Standards	66
	5 Communities and networking	60
	6 Capacity development	58
	7 Policies	54
	8 Sustainability	51
	9 Research	50
National government	1 Policies	87
	2 Copyright	68
	3 Financing	66
	4 Awareness raising	61
	5 Accessibility	56
	6 Sustainability	55
	7 Capacity development	50
Academics	1 Research	71
	2 Assessment of learning	66
	3 Quality assurance	59
	4 Learning support services	53
	4 Communities and networking	53
	6 Awareness raising and promotion	52
OER associations	1 Communities and networking	66
	2 Awareness raising and promotion	61
	3 Standards	60
Professional and academic organizations	1 Assessment of learning	56
	2 Awareness raising and promotion	55
	3 Communities and networking	54
Technology companies	– Technology tools	73
Foundations or other grant-making organizations	– Financing	71
Higher education funding bodies	– Financing	56
Regional or local government	– Policies	54
Publishing and media companies	– Copyright	52
Regulatory and accreditation bodies	– Quality assurance	51
Non-governmental organizations	– Awareness raising	51

*Note:* The order of the issues in the table relates to the number of times that the stakeholder was selected for each issue: only issues assigned to a stakeholder by more than half of the respondents are shown. The percentages are indicative of the degree of consensus that a certain issue should be taken up by a certain stakeholder.