

## BACKGROUND DOCUMENT

### **Summary**

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, and re-share. OERs present a strategic opportunity to improve the quality of education as well as facilitate policy dialogue, knowledge sharing and capacity building.

Despite the great success of OER initiatives such as the OpenCourseware (OCW) Consortium, African Virtual University OER Portal, Teacher Education in Sub-Saharan Africa (TESSA), Khan Academy and countless examples at secondary school level, OERs are not mainstreamed in education planning. Moreover awareness of the costs and benefits of OER is still very limited.

With the generous support of the William and Flora Hewlett Foundation and in full partnership with the Commonwealth of Learning (COL), UNESCO will organize the 2012 World OER Congress to:

1. showcase the world's best practices in OER policies, initiatives, and experts; and
2. release a 2012 Paris OER Declaration calling on Governments to support the development and use of OERs
3. celebrate the 10th anniversary of the 2002 UNESCO Forum that created the term OER;

The Congress will bring together Ministers of Education/Human Resource Development, senior policy-makers, expert practitioners, researchers and relevant stakeholders to discuss what works and what will not work, and to agree on a Declaration with a set of targets for a 2015 World Conference.

As part of the preparations for the event, UNESCO and COL have been organizing lead-up Policy Forums in Africa, Arab States, Latin America, the Caribbean, and Asia and the Pacific. An International Advisory Liaison Group of Government, IGO, and NGO representatives has been formed to advise on the Congress and the Declaration.

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### ***Introduction***

Information technology can help to equalize the distribution of high quality educational opportunities throughout the world. In particular, having learning materials freely available for adaptation and re-purposing can expand access to learning of better quality at lower cost. A campaign to make freely adaptable content known as Open Educational Resources (OER)) widely available has gathered momentum. A global community of OER producers has emerged and institutions are incorporating these resources into their teaching and learning strategies. Whereas the early traffic of OER was from developed to developing countries, exchanges are becoming more multi-directional as developing countries become active producers of OER.

Despite the great success of OER initiatives such as the OpenCourseware (OCW) Consortium, African Virtual University OER Portal, Teacher Education in Sub-Saharan Africa (TESSA), Khan Academy, and countless examples at secondary school level, OERs are not mainstreamed in education planning. Moreover awareness of the costs and benefits of OER is still very limited.

Knowledge of OER and their potential is still sparse among leaders and policy makers in governments and institutions. This is particularly true in developing countries, which could benefit greatly from OER since they suffer from a paucity of good learning materials at all levels. Until governments and institutions adopt policies and practices to encourage open access to educational materials, OER risk remaining outside the institutional mainstream.

Actions by UNESCO and the Commonwealth of Learning (COL) over the last two years have begun to spread awareness of the value of open content beyond the 'OER Community'. The time is now ripe to secure commitments from governments in all regions of the world to the principle of open access to educational materials produced with public funds. The UNESCO World OER Congress scheduled for 20-22 June 2012 in Paris, where governments will be invited to adopt a declaration encouraging more access to quality content, provides a major opportunity.

The missions of both COL and UNESCO include the sharing of knowledge, educational resources and technologies. Both organizations are committed to supporting the OER movement.

UNESCO and COL have been preparing the ground for this Congress with support from the William and Flora Hewlett Foundation (WFHF). This work has been taken in three steps:

- background documents. *A Basic Guide to OER* and *Guidelines for OER in Higher Education* were published by COL and UNESCO in October 2011;
- policy inventory. A survey of all governments is being conducted in order to a worldwide inventory of policy and policy intentions on OER. A mail survey is under way and this is being reinforced by policy forums of government officials in all UNESCO regions between January and May 2012;
- Declaration. A Declaration on OER is being prepared for submissions to governments at the UNESCO World OER Congress 2012.

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Since 2009, UNESCO and COL have worked together to follow up on a draft resolution calling for the further promotion of OER that was presented at the 35th UNESCO General Conference (2009). This resolution was inspired by the Communiqué of UNESCO's 2009 World Conference on Higher Education, which stated that Open and Distance Learning approaches and Information and Communications Technologies present opportunities to widen access to quality education, particularly when OER are readily shared among many countries and higher education institutions.

This was the context for the COL-UNESCO initiative 'Taking OER beyond the OER Community: Policy and Capacity' that was launched in 2010 with the aim of increasing the level of understanding of OER by educational decision makers so as to promote their wider use. The initiative focused in the first instance on higher education institutions – universities located in Africa, Asia and the Pacific – as part of a Joint Work Plan Agreement between UNESCO and COL. It was financed with regular programme funds from the two organizations and some extra-budgetary funds provided by the US Government through its delegation to UNESCO (see: <http://oerworkshop.weebly.com>).

Under this initiative, eight advocacy and capacity-strengthening workshops (in Africa and Asia) and three online forums on OER were held. The results of those events were reported to a policy forum at UNESCO HQ in December 2010, which recommended that COL and UNESCO develop policy guidelines to support the integration of OER into Higher Education.

In response, UNESCO and COL have developed Guidelines for OER in Higher Education, which were launched at the 36th General Conference on 1 November 2011. These Guidelines were developed after lengthy consultations with experts in all UNESCO world regions. They address key stakeholder groups: governments; higher education providers; teaching staff; student bodies and quality assurance/ accreditation & qualification recognition bodies (see: [www.col.org/OERguidelines](http://www.col.org/OERguidelines)).

In parallel, *A Basic Guide to Open Educational Resources* (see: [www.col.org/oerBasicGuide](http://www.col.org/oerBasicGuide)) has been published as a starter document and compendium of information and resources.

### ***Objectives of the 2012 World OER Congress***

These activities provide a solid foundation for further work in 2012 to advance the principle and practice of open access to publicly funded resources. The key event will be the UNESCO World OER Congress to be held in Paris on 20-22 June, 2012, which will be a milestone on the route to a further conference on OER and the Millennium Development Goals (MDGs) scheduled for 2015, which is the target date for achieving the MDGs.

At the June 2012 UNESCO World OER Congress, governments will be invited to adopt a Declaration (the Paris Declaration) that will encourage commitment to the principle that the products of publicly funded work in support of education should carry open licenses.

In the months leading up to the June 2012 Congress, COL and UNESCO has been organising 6

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policy fora in the major regions of the world in order to continue to inform governments and educational leaders about the potential of OER and to invite them to participate in the drafting of the Paris Declaration. These Regional Policy Fora were organized in 2012, thanks to the support of the national authorities in the host countries. These Regional Fora were held in: Bridgetown, Barbados (Caribbean Regional Forum), 24-26 January 2012; Johannesburg, South Africa (Africa Regional Forum), 21-23 February; Sao Paulo, Brazil (Latin America Regional Forum), 28-29 March; Cambridge, UK, (Europe Regional Forum), 17 April; Bangkok, Thailand (Asia and the Pacific Regional Forum ), 23 -24 April; Muscat, Oman (Arab States Regional Forum), 7-8 May.

Given the absolute importance of effective consultation and networking to the success of the proposal, a broadly-based International Advisory and Liaison Group (IALG) with governmental representatives nominated by UNESCO's regional groupings has been established. It is co-chaired by the President of COL (Project Director) and UNESCO's Assistant Director-General for Communication and Information. Alongside government representatives identified by UNESCO's regional groupings, it includes representation from other organizations (e.g. Creative Commons; OER Africa; OECD; WIPO) with a special interest in OER.

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### For more information

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