BACKGROUND PAPER

Open Educational Resources: Opportunities and Challenges

The project was launched in August 2005 by the Centre for Educational Research an Innovation (CERI) at OECD. It will concentrate on Open Educational Resources initiatives in tertiary education, although many of the fundamental issues in this field affect the whole educational spectrum.

There are many critical issues surrounding access, quality and costs of information and knowledge over the Internet as well as on provision of content and learning material. As it becomes clearer that the growth of Internet offers real opportunities for improving access and transfer of knowledge and information from universities and colleges to a wide range of users, there is an urgent need to clarify these issues with special focus on OER initiatives. There is also a need to define the technical and legal frameworks as well as business models to sustain these initiatives.

By Open Educational Resources (OER) initiatives we understand: 1) open courseware and content; 2) open software tools (e.g. learning management systems); 3) open material for e-learning capacity building of faculty staff; 4) repositories of learning objects; and 5) free educational courses. A more thorough conceptual analysis will take place in the course of the study.

The purpose of the OECD/CERI study is to clarify and analyse these issues, mapping the scale and scope of these initiatives in terms of their purpose, content, and funding and addressing four main questions:

1. How to develop sustainable costs/benefits models for OER initiatives? Many OER initiatives have obtained "seed resources" from private foundations and public authorities. The financial sustainability of these projects in the long term is a key issue. In general, the social value of knowledge and information increases to the degree that they can be shared with, and used by, others. But at the moment, the individual institution providing OER has to bear the costs of providing social benefits on a global scale. Many institutions are not able to do this, especially if seed money runs out. An analysis of the positions of different stakeholders is needed to tackle the question of costs and benefits.

2. What are the intellectual property right issues linked to OER initiatives? The key issue is to find the right balance between "open material to all with no control" and "open to no one". The project on "Creative commons" is for example seeking such a balance. A possible challenge is to join Creative Commons with national initiatives to find legal frameworks for OER initiatives. Furthermore there are important distributional and equity issues related to IPR both within countries and between North and South countries. Among academic economists and other experts of intellectual property rights, there is now lively discussions about the economic "raison d'être" of strong intellectual property right

rules and their implementation. Taking on board these generic issues, how best to address IPR issues in OER initiatives will be discussed and analysed.

3. What are the incentives and barriers for universities and faculty staff to deliver their material to OER initiatives? This issue has both an individual and an organisational dimension, and has significant policy implications at national and international levels. Promotion and funding allocations in universities and research institutions are often linked to publication in a few, key, refereed journals often only available in specialised libraries. In parallel, scientific publishing are facing a generic transition from print publishing to online communication and dissemination. Players throughout the scholarly communication product system are developing new skills and new business models, while at the same time maintaining the existing print paradigm. There are thus costs to be born from moving from the print to the online paradigm. The challenge is to work out what to do differently and what new things to do to facilitate an effective communication and dissemination of knowledge and information.

4. How to improve access and usefulness for the users of OER initiatives? There are many different issues linked to this question. One of them is quality assurance. User commentary, branding, peer reviews or a kind of user community evaluating the "quality" and the usefulness of the material might be possible ways forward. Another important challenge is to adapt "global OER initiatives" to local needs and to create a "dialogue" between the providers and user of the OER. Lack of cultural and language sensitivities might be an important barrier to the receptiveness of the users. Training initiatives for users to be able to apply course material and/or software might be one way forward to reach out to potential users. Also important will be the choice (using widely agreed standards), maintenance, and user access to the technologies chosen for the task.

Four main activities are planned within the project:
- a concept analysis of the concept "open educational resources";
- a mapping activity with the purpose of giving the contours of an "OER initiates map" in order to grasp the scope and scale of OER activities;
- two web-surveys: one to a restricted number of higher educational institutions and one open survey. These will be complemented with site visits, telephone interviews etc. to further investigate how institutions tackle the above mentioned issues;
- a close co-operation with UNESCO International Institute for Educational Planning (IIEP) Forum on Open Educational Resources/Open content.

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