

A Golden Combi?! -
Open Educational Resources and
Open, Flexible and Distance Learning¹

Final report from the ICDE Task Force on Open Educational Resources

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Summary

This final report of the ICDE Global Task Force on Open Educational Resources addresses the relevance of the worldwide OER movement to educational institutions - such as ICDE member institutions - engaged in the field of open, flexible and distance learning.

The composition of the Task Force, with members from open and distance learning universities around the world, sought to provide representation for OER developments worldwide. In order to gain an overview of the penetration of OER developments and involvement, an initial survey of ICDE member institutions was conducted. The Task Force found that it could build on a report from OECD on OER that was published just as the Task Force held its launch meeting. The OECD report "Giving Knowledge for Free: the Emergence of Open Educational Resources"³ gives a very thorough overview of OER developments so far and in addition identifies the major problems and topics for further consideration. The Task Force has used this report for general reference and has focused on the topics and issues that are particularly relevant for open and distance learning institutions, concentrating on higher education.

The ICDE SCOP Meeting 2007 at OUNL in Heerlen, The Netherlands was used to consult the presidents and rectors of ICDE member institutions on the expected outcomes of the Task Force's work.

This Final Report describes major milestones during the work of the Task Force and summarizes its conclusions and recommendations in a final chapter.

¹ This Final Report was presented in its draft form at the ICDE SCOP Meeting 2008 in Shanghai. The final version was completed on the basis of comments received during that meeting

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³ See: <http://www.oecdbookshop.org/oecd/display.asp?k=5L4SM3S5andCID=andLANG=en>

0 Introduction

In 2001, the Massachusetts Institute of Technology launched its Open Courseware initiative. Since then the so-called “Open Educational Resources” (OER) movement has spread around the world. In the arena of open, flexible and distance learning several significant initiatives have been undertaken, for example in Europe: Open Learn by the Open University in the UK, Open ER by the Open Universiteit Nederland (OUNL), and MORIL (Multilingual Open Resources for Independent Learning) by EADTU (European Association of Distance Teaching Universities) and its members. Organizations like UNESCO have taken an interest in this development from the start. OER is of particular relevance for developing countries as OER combined with open, flexible and distance learning can contribute to easier and better access to education.

Recognizing the importance of this movement, and based upon discussions between ICDE (International Council for Open and Distance Education) and UNESCO at the ICDE SCOP Meeting in Lillehammer in June 2006, ICDE elected to establish the ICDE Global Task Force on Open Educational Resources, to be composed of members from every continent, and with differing cultural and educational perspectives. This new Task Force (TF) was announced during the 22nd ICDE World Conference. In order to show its support for the initiative, UNESCO invited the TF to hold its launch meeting at UNESCO’s Headquarters in Paris in November 2006.

The ICDE SCOP Meeting hosted in June 2007 by OUNL in Heerlen was fully devoted to OER with the theme ‘Open Educational Resources as an instrument for achieving Education for All’. This SCOP Meeting was instrumental in advancing the work of the TF on the basis of the Interim Report presented to SCOP 2007 by the TF Chair, and to further develop the thinking among SCOP participants on OER as an innovative and challenging concept as well as on OER strategies and implementation scenarios. The TF held a parallel meeting alongside the SCOP Meeting in Heerlen, observing the major conclusions and recommendations of the SCOP Meeting and agreeing on how to proceed. The TF completed its work by delivering its Final Report to the ICDE SCOP Meeting hosted by Shanghai TV University in October 2008, and by having this report accepted by ICDE.

This Final Report contains the following chapters:

1. Scope and composition of the TF
2. Results of the OER questionnaire distributed to ICDE member institutions
3. Outcomes of the 2006 launch meeting of the TF at UNESCO’s Headquarters in Paris
4. The ICDE membership perspective on the OECD Report on OER
5. Outcomes of the ICDE SCOP Meeting 2007 at OUNL
6. Further developments after the ICDE SCOP Meeting 2007
7. Conclusions and Recommendations
8. Epilogue: does India show the way?

1 Scope and composition of the Task Force

The ICDE Global Task Force on OER is - through its members - connected to several world regions, links to other initiatives on OER, and includes representation from UNESCO.

The TF has the following members:

- Fred Mulder (Chair), Rector, Open Universiteit Nederland, The Netherlands (also Chair PC 2007 ICDE SCOP Meeting-Heerlen/ NL, Chair PC 2009 ICDE/ EADTU World Conference-Maastricht/ NL, and Chair EADTU OER/ MORIL Task Force)
- Nick Allen, Provost Emeritus and Collegiate Professor, University of Maryland University College, USA
- Susan D'Antoni, Programme Specialist, Open Educational Resources Project, UNESCO
- Stuart Hamilton, CEO, Open Universities Australia, Australia
- Helmut Hoyer, Rector, FernUniversität in Hagen, Germany (also acting ICDE President until the end of 2007)
- Sally Johnston, Vice President Academic Affairs, Winona State University, USA
- Fredric M. Litto, President of ABED, Brazil (also member ICDE Executive Committee as of January 2008)
- Bernard Loing, ICDE Permanent Delegate to UNESCO, France
- Frits Pannekoek, President, Athabasca University, Canada (also ICDE President as of January 2008)
- Paulina Pannen, Director, SEAMEO Regional Open Learning Centre (SEAMEO SEAMOLEC), Indonesia
- Barney Pityana, Vice Chancellor, University of South Africa, South Africa (also member ICDE Executive Committee as of January 2008, former ACDE President)
- Reidar Roll, Secretary General, ICDE (until Spring 2007)
- Tarek Shawki, Director, Cairo Office, UNESCO
- Atwi Suparman, Rector, Universitas Terbuka, Indonesia
- David Vincent, Pro Vice-Chancellor, Strategy Planning and External Affairs, The Open University, UK (also EADTU President).

Furthermore the TF is supported by:

- Jos Rikers, Senior Officer International Relations, OUNL (also Chair Organizing Committees of the 2007 ICDE SCOP Meeting - Heerlen/NL and Of the 2009 ICDE/EADTU World Conference - Maastricht/NL)
- Ana Perona, Assistant Secretary-General, ICDE Secretariat (part of 2007: Acting SG)
- Nina Bagley, Chief of Information and Membership Services, ICDE Secretariat.

The mandate of the Task Force was to develop a report on Open Educational Resources. The report aims to contribute to the global OER movement, adding specific 'ICDE' flavor and value by adopting the self-and-distance-learning perspective rather than the mainstream content-in-classroom perspective.

The report tackles subjects including:

- Availability/ access
- Intellectual property rights
- Internationalization versus Localization of content (regarding language and culture)
- Support for learning communities

- Quality control
- Financing and sustainable business models
- Interfacing with conventional degree studies
- Opportunities for bridge-building between informal, non-formal and formal learning
- Diversity in target groups
- Experiences/ good practice with existing offers, various options, misuse and benefits to institutions offering OER
- Potential for developing countries using OER
- Changing roles of the public and private sectors
- Other issues considered relevant by the group

The aim of the TF is to produce a report that will serve:

- As an aid to Higher Education and Open and Distance Learning institutions in their decision to introduce, or not to introduce OER activities, either as a provider or as a recipient
- As a promotional basis for the OER concept
- As a guideline for interested stakeholders
- To assist ICDE in defining its own strategy in this field, including a proposal for an action program for collaboration among its membership
- To contribute to the OER global movement from the perspective of independent (or autonomous) learning in a distance learning setting rather than teacher dependent learning in a face-to-face setting
- As a paper for presentation, consideration and discussion at the 2007 ICDE SCOP Meeting

2 Results of the OER questionnaire distributed to ICDE member institutions

In the middle of October 2006 ICDE members were sent a questionnaire on OER⁴. The purpose was to obtain an overview of the issues at stake and the level of involvement of the ICDE membership in this movement.

A fair number of ICDE members (17%) from different world regions responded

The results showed that OER is a very actual theme for many institutions around the world.

To the question about their knowledge on the OER movement, 68% were definitely acquainted with the movement, while 32% was not too familiar with it.

To the question of the institution's involvement or planned involvement in a Project on OER, 60% were positive while 40% were negative. Those involved in projects have also described them, and provided links to the relevant websites.

The major opportunities which OER could bring to open, flexible and distance learning institutions, can be summarized as follows:

- Easy access to quality content, reaching a wider audience
- Cost effectiveness: it can help distance learning providers to be more cost effective in developing learning materials and support
- Greater volume of learning resources available to all

⁴ The Questionnaire was composed by Jos Rikers (OUNL), and the process administered by the ICDE Secretariat.

- Quality learning materials can be obtained by nations and institutions with scarce financial resources to help solve capacity problems
- Flexibility: greater variety and diversity of learning resources will create more flexible learning opportunities
- Opportunities for sharing of available resources, increase opportunities for partnerships, for instance through a “Share-alike” protective clause in a Creative Commons license.

The following major threats that OER could represent for open, flexible and distance learning institutions have been mentioned:

- Copyright, Intellectual Property Rights issues: there is potential for copyright infringement of restricted works by OER authors
- Quality: OER without appropriate review processes can lead to low quality materials
- Cultural domination / Globalization: there is a potential risk for increasing the digital divide
- Lack of a viable new business model that may replace the old one
- Well known “brand” institutions may attract even more students
- “Not invented here” syndrome, academic preference to use their own materials
- Lack of initiative: less scope for research and innovations and uniform prescription of materials, less incentive to produce knowledge
- Content is not the same as learning materials.

Finally, 92% of those who answered the inquiry responded positively to the question about their interest in participating in ICDE activities in this topic.

Further information about the questionnaire results can be obtained from the ICDE Secretariat.

3 Outcomes of the 2006 launch meeting of the Task Force at UNESCO’s Headquarters in Paris

With UNESCO and Dr. Abdul Kahn as host, the launch meeting of the Task Force on November 12-13 in Paris proved to be a fruitful and necessary first interactive exercise on OER.

Important input was given by all members of the TF. More specifically there were three presentations, by:

- Fred Mulder (OUNL,TF Chair), ‘Bringing a global movement on OER in a new learner centered mode’
- Jan Hysten (OECD), ‘An overview of most important issues related to the further development of OER’
- Jos Rikers (OUNL, TF support), ‘ICDE TF OER Questionnaire results’.

These presentations are accessible through the ICDE Secretariat, as is the case with a rather extensive report on the meeting.

Here we only present the ten main highlights from the discussions:

1. The main message was that the OER movement should focus more on the Independent learner, on top of the ‘traditional’ emphasis on the distribution of digital classroom content. This implies:

- ‘Open’ is meant to contribute to better and easier access
- ‘Educational’ is to be read as directed towards learning and in a student-centered approach
- ‘Resources’ is to be interpreted in a broad sense, and not only to support teachers but also to support learners

This is a perspective that typically can be achieved by the ICDE membership and can be facilitated by ICDE in collaboration with UNESCO.

2. In order to underline this somewhat other paradigm we might want to use the term Open Learning Resources (OLR) rather than OER. Furthermore it was raised that the OER definition is too vague. Does it refer to a course, an object, large pieces or small pieces? What degree of granularity is intended? Is it meant for teachers, or learners, or both? However, it was a rather general feeling that we should work with a concept that stays as broad and general as possible, keeping the word ‘Education’. What MIT offers is mainly content, not learning materials. This TF needs to develop the ICDE touch.
3. ‘Open’ does not necessarily mean ‘free’. MIT puts the content online, but the learning experience is not free, neither the pedagogy. Materials can be free on the web, but added value through services cannot. Where do we draw the line? ‘Open’ and ‘free’ are different concepts. The barriers must be low, OER must be easy to find, attractive, to provide people with easy access to get them into Higher Education. The concept is new: we do not know how this will develop.
4. The concept is too abstract: what is the position of a given teacher or student in a given country? We need a bottom-up approach, more than a top-down approach. Developing countries do not want to see themselves only as users, but as producers of materials as well.
5. Some findings and preliminary conclusions of the OECD study, lead by Jan Hylen, on the map and scope of the OER movement:
 - It is a global movement
 - There is a growing number of initiatives and resources, but accurate figures are lacking
 - There is a growing number of users, mainly in the categories of post-secondary instructors, students and the general public
 - User data are poor, because of the easy access and most providers have no registration requirement.

A basic observation is that there is a growing competition among Higher Education Institutions for funding and for students. Some institutions give the content away while others are keeping it under tight control. What are the implications?

6. With MIT, Tufts, and Johns Hopkins as sources, the OECD study gives the following characterization of the use and the users of OER:
 - Well-educated (bachelors or masters) self-learners, from North America
 - Often use it as supplement or complement for its flexibility and quality
 - Primarily in small chunks of learning.
7. According to the OECD study the following motives may hold for institutions:

- Altruistic reasons
- Leverage on taxpayer money by allowing free sharing and reuse between institutions
- “You give it away and you receive it back improved”
- Good PR show window that attracts students
- With growing competition, new, attractive and easily distinguishable models are needed
- Stimulation of internal improvement, innovation and reuse.

Motives for individuals can be:

- Altruistic reasons
- Desire to stimulate innovation
- A wish to share for creative and educational purposes
- Publicity or reputation
- Like the open source movement in software (boost own ego)

8. The OECD study refers to the following main challenges:

- Quality and relevance of resources
- IPR, copyright and licensing
- Sustainability
- Goals
- Organization: size, structure, degree
- Type of resources and media format for sharing

As possible revenue models the OECD study mentions:

- Replacement models: OER replaces other costs (has a natural limit)
- Foundation-donation models (for starting up)
- Segmentation models, offering added value services to user segments
- Conversion models (commercial mode): give away a part, build the market and convert consumer to paying customer
- Voluntary support membership model
- Contributors-pay-model: contributors pay the costs while the provider makes it available for free

9. The OECD study identifies as technical issues:

- Open source software and standards
- Metadata harvesting
- Security, privacy, long term presentation
- Individual faculty and students using free services outside the university network
- Who owns the information? What if a company that runs it, starts charging?
- Long term preservation of information and research data

Moreover, the OECD study also addresses the question:

“What is new with OER?”

- Way of grass root involvement as producers and users
- Strength of allowing a multiple motivational system: altruistic and economic driven

- Open-up for new business models
- Brings web 2.0 to education
- Technological developments challenge HE institutions
- New wine in old bottles: “is it a way to hype up e-learning again?”

(10) Some comments on the OECD study:

- There is a problem of lack of stimuli and incentives: what do I get back? Without a reward system, academics will not be willing to collaborate. In many developing countries teachers have a source of income when preparing students. We need a business model that convinces people to give away their materials.
- There was no mention of the language issue! There is cultural hegemony. English is too dominant. We must pay attention to cultural models of learning, and academic cultures. Barrier-free and open differs among the different cultural contexts.
- An information literacy course would be essential in order to be able to discern and evaluate the quality of the materials available.
- A crucial issue is to motivate key decision-makers to make materials available. Only 1% of a university budget spent on open access press would be hugely transformative.
- The Task Force should identify how a free system can be designed or built to hold the reference systems or templates together. How the systems can talk to each other. Now portal and repositories do not talk to each other. There are many access questions.
- The format of delivery of OER is very important, bandwidth / access to technology issues, how to deliver in a particular context varies.
- What is the specific ICDE flavor: what will be the branding, uniqueness of ICDE in OER? Maybe not to be addressed to individual learners alone. It might be institutional capacity building, or a learner-centred approach from an institutional point of view.

Summary of recommendations for the TF mandate:

1. We should not address all types of general OER issues (that is being done by many others already), but rather concentrate on the self-study and learner-centered approach of OER materials, in other words the ICDE flavor in OER.
2. We can lend from a variety of rich sources: UNESCO, Hewlett Foundation, OECD, Open Courseware Consortium, EADTU
3. There is a need for fundamental reflection on the OER definition within the context of the open and flexible learning model as applied – although in some variety – throughout the ICDE membership.
4. An extremely important issue is the business model, as is the cultural, linguistic, political and economic diversity.
5. We underline the primary question: “How can OER contribute to respond to the ‘Education for all’ UNESCO policy, capacity building, widening participation and access?”(emphasizing the developing countries context).
6. And the secondary question: “What role can be attributed to OER in developing or strengthening a knowledge-based society?”(emphasizing the developed countries context).

4 The ICDE membership perspective on the OECD Report on OER

The OECD study referred to in the previous Chapter resulted in a report which in its final draft version was sent to the Task Force members for reflection from a specific ICDE point of view. The reviews that we have received have been collected in a compact presentation, ordered according to

the chapters that were reviewed⁵.

Note that after having sent the draft OECD OER Report to the TF members for reflection, the report was published in its definitive form by the OECD under the title: ‘Giving Knowledge for Free: the Emergence of Open Educational Resources’⁶.

The reviewers agree in their opinion that the OECD OER Report shows excellence. It is a very relevant and readable report that is to be recommended to all who are active in the OER area as well as to those who wish to get a better insight into the OER concept and the global OER movement. It has the characteristics of an overview report on the one hand and giving direction on how to tackle some of the major OER issues in an appropriate pragmatic way on the other hand. That indeed makes it attractive and very valuable for all OER interested individuals, organizations and governments around the world.

Nevertheless the TF has generated a series of notions and comments as well, supportive, questioning, or critical. The most relevant ones are summarized below.

Summary of the reviews:

1. Besides the four forces for change with high impact on Higher Education (HE) that are mentioned: globalization, demography, governance and technology, we might identify an important fifth force for change, a fifth challenge in HE, that is the need for substantial up-scaling of the total population in HE. Present day mainstream campus-based HE cannot cope with such (large) demands. OER and the model of open and flexible learning offer relevant solutions in this respect.
2. LifeLong Learning does not receive much attention. The natural bridging between informal, non-formal and formal learning by OER and the paramount opportunities this offers to widening and increasing participation in Higher Education, however, make OER probably a most powerful instrument in the area of Lifelong Learning (LLL).
3. Public funding is referred to in the report. Thinking of knowledge as a public good, indeed giving it for free, and the supposed responsibility of governments for access, quality and efficiency of HE (and education in general), would justify a ‘good’ debate on the funding role of governments.
4. In the LLL perspective, freely available content on the Internet should empower learners to really study on their own in an open and flexible learning environment, with no (avoidable) references to a teacher, a classroom or an educational institution. This requires structural and explicit learner-centered content design instead of the conventional teacher-centered content approach.
5. One might question whether for openness the no cost attribute is fundamental, or is actually a complex system of mechanisms that removes all traditional existing barriers: institutional registration, required diplomas/ certificates, on-campus classes and face-to-face meetings, fixed schedules, rigid pacing, over-specified programs, too big program components, and so forth. Here the characteristic Openness of the Open and Distance Learning (ODL) Universities is at stake: in its broadest interpretation open as to access, places, scheduling,

⁵ Input has come from: Susan D’Antoni, Stuart Hamilton, Helmut Hoyer, Sally Johnstone, Frits Pannekoek, Paulina Pannen, and Tian Belawati (on behalf of Atwi Suparman).

⁶ See: <http://www.oecdbookshop.org/oecd/display.asp?k=5L4SM3S5andCID=andLANG=en>

spacing, and combining courses, as well as open to people, methods and ideas, linking this openness with OER, could make ODL universities important players in the OER movement.

6. Many OER users seem to be well-educated learners. This is not surprising since OER materials generally are not designed for self-study and that's why a high level of education is required in order to be able to learn without additional guidance or support. This means that the potential of OER is heavily underexploited. The report refers to the three European OER initiatives from ODL Universities mentioned earlier (UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL)⁷. These OER activities can be considered as a new generation ('second wave') in OER development, since their learning materials are explicitly designed for self-study. This significantly lowers the barriers to self-learners as compared to providing classroom learning materials. If we take UNESCO's goal of 'Education for All' seriously, this is extremely important, also in connection with the earlier remarks on up-scaling, LLL and informal learning.
7. Open courseware should take into account the IP and copyright heritage of other cultures, particularly China. It should be realized that open courseware could be a one-sided exercise. If there are more 'takers' than 'contributors' to open courseware will the world be richer? If Euro-American centric institutions dominate the contributions – as is likely – what will be the international outcome?
8. The ultimate openness of OER leads to a large flexibility in the process of continuous and interactive development and implementation anywhere, anytime, by anybody. The OER contributors share the willingness to devote their time to work on OER activities, and enjoy the input and feedback from others wherever and whenever. However, once the euphoria of being an OER developer subsides, maintaining the OER materials updated at high quality might be very difficult.
9. The report fails to provide concrete sound economic models for OER. HE institutions do have various options, however, to possibly find considerable revenues, not from their content, but rather from credentialing, from examination processes, and from personal support to learners.
10. In regions and areas where ICT opportunities are scarce there is a danger that 'the (prospective) users are left behind'. So, a prerequisite for a successful OER movement is easier and better access to ICT facilities, which implies that they should have a high priority in any OER action plan.
11. In many countries, where English is not widely spoken, it will be close to impossible to effectively join the international OER community. A way out is OER initiatives in different (working) languages. This practice is encouraging and necessary. Nevertheless, there remains a language barrier to a full sharing of experiences and lessons learned with colleagues from different parts of the world.
12. Generally translating is not enough since the conversion of the learning materials should also include adaptation to a different social-cultural context. For this so-called 'localization' process automation is no option, which implies 'hard labor'.

⁷ See:

<http://www.open.ac.uk/openlearn/home.php>;

<http://www.opener.ou.nl>;

<http://www.eadtu.nl>.

13. OER is warmly welcomed by the developing countries, because this will provide access for students and institutions to learning resources, which previously were restricted to specific institutional use only. ODL Universities can benefit from OER materials in being able then to reduce the costs for developing their learning materials. There also exist, however, serious barriers for the use of OER in developing countries: (i) the low degree of access to ICT facilities and the corresponding high costs, and (ii) the social and cultural context for the learners and the society in which they live, which may be very different from the environment where the materials have been developed. Localization is absolutely necessary.
14. The Quality Assurance (QA) issue is addressed in the report but its extreme importance cannot be overestimated. The ODL Universities could contribute to this easily by labeling their OER materials with their reputations and brand names (as is suggested in the report). In Europe, the EADTU has run a QA project, called E-xcellence, addressing the quality of e-learning along various aspects. The outcomes have been generally applauded, are very practical for direct operational use, and might be valuable for the QA of OER.

5 Outcomes of the ICDE SCOP Meeting 2007

The SCOP Meeting at OUNL with its theme ‘Open Educational Resources as an instrument for achieving Education for All’ was an important event for the Task Force. One could say that the SCOP Meeting acted temporarily as an extension of the TF, developing feedback, critically reflecting, generating ideas, setting priorities, and giving direction to the OER future for ICDE and its membership.

The SCOP Meeting is an exclusive meeting for the leadership of the ICDE member institutions (Vice-Chancellors, Rectors, Presidents, Directors, and Principals). SCOP 2007 was attended by about 60 participants (of whom ten TF members) from 22 countries whereby all the continents around the world were represented.

The program of the SCOP Meeting shows a mix of plenary sessions with a variety of expert speakers from academia, research, government, industry, ODL University OER initiatives, UNESCO and OECD, and a series of highly interactive thematic workshops. The Dutch Minister of Education, Culture and Science was present at the opening session, thereby underlining the importance of the overall theme for the maturing Dutch knowledge-based society. The TF Chair presented the TF Interim Report as substantial preparatory work to SCOP 2007.

The three thematic workshops turned out to be very fruitful and effective. The participants were split in groups based on their regional (continental) origin: one Asian group, one European group and one group for the other continents.

In the first workshop on ‘What is OER for the ICDE membership?’ the discussion focused around the question what in OER is typical for ODL institutions (ICDE membership) and what issues might be of a more general nature, for all institutions in (higher) education to consider, or for national authorities to deal with.

The second workshop on ‘Policies, impact conditions and implementation for the ICDE membership’ addressed the question of what ICDE can and has to contribute to the worldwide OER movement and in service to its members. Because the participants were grouped according to their regional origin, it was easy to record the large diversity in topics that were put forward. As a basis, a survey by UNESCO, identifying relevant topics when dealing with OER, was used. The topics were discussed and prioritized. Copyright issues, awareness raising and promotion, financial issues,

quality assurance, learning support services, and assessment of learning were all topics scoring high amongst the participants, but in different orders of priority depending on the continental origin.

This workshop resulted in a recommendation to ICDE to establish a clearing house or support centre for their membership. In this support centre information on the different topics could be provided. At the same time this support centre could track the progress of OER and the progress within member institutions and share this information amongst the membership. ICDE could also set up an online training program for faculty and contribute to the clarification of standards on the metadata level in developing OER materials.

Workshop number three on ‘Sustainability of the OER approach for the ICDE membership’ touched the fundamental discussion of the business model of the institutions. If content is no longer the unique selling point, what is it then that institutions should market? Or does OER mean that institutions as we know them today are obsolete? The discussion was strongly related to the discussion in workshop number one, where an ICDE shaped definition of OER was considered. Depending on that definition, how ‘open’ is OER in the context of higher education and does ‘open’ necessarily mean ‘for free’?

The conclusion from this workshop was that there is not one definition of OER nor is there a single model for sustainability. There is a strong dependency on the local situation. The workshop results indicated a clear link between governments’ ambitions to increase participation rates in higher education and the need to redefine sustainability of OER provided by publicly funded institutions. This does not automatically mean that all learning with OER should be for free for the learner. It was concluded that ‘open’ is not equivalent to ‘for free’ for all components of the OER-based learning process. Again, this workshop advised ICDE to establish a support facility for information exchange, learning from best practices and stimulating collaboration. A warning was issued not to replicate what other consortia already do.

With the TF Interim Report as input, the broad spectrum of relevant outcomes of the thematic workshops, the deep scholarly views from the variety of plenary speakers, and the engagement of all participants it was not difficult to close the SCOP Meeting with a proper and distinct set of conclusions and recommendations. The Task Force had a meeting next to SCOP 2007 in Heerlen, reviewed and virtually adopted the SCOP 2007 conclusions and recommendations, and added to them a minor extension in terms of some further actions to be planned by ICDE. The merger of the TF reviewed SCOP 2007 conclusions and recommendations and the TF extension will be presented in Chapter 7.

6 Further developments after the ICDE SCOP Meeting 2007

We are witnessing a solid expansion of the global OER movement.

- There is an ever increasing number of initiatives worldwide, not only in Higher Education but also in Secondary Education, varying from top-ranked universities to regional colleges, from institutional consortia to individual actions, in a broad spectrum of disciplines
- The UNESCO OER Community is growing in membership and remains as active as ever, after initial intensive forums run by UNESCO’s International Institute for Education Planning (IIEP)⁸
- The Open Courseware Consortium initially launched by MIT and incorporated as a non-profit organization shows a substantially growing membership from a wide variety of institutes in different countries around the world⁹

⁸ See: http://oerwiki.iiep-unesco.org/index.php?title=Main_Page.

⁹ See: <http://www.ocwconsortium.org/>.

- The William and Flora Hewlett Foundation has been very instrumental by financing many OER projects, starting with MIT in 2001, and still is a crucial player in boosting the OER movement both with financial support and through their extensive network of expertise and advice¹⁰.

The recent developments in Europe are of particular interest within the context of this TF Report dealing as it is with OER for open and flexible learning in general and OER related to ODL Universities more specifically. The projects OpenLearn from UK OU and OpenER from OUNL, both started in 2006, have come to the stage that both front running universities UK OU and OUNL must soon resolve their strategic dilemma regarding a full conversion to OER. The other eight ODL Universities in the EADTU/ MORIL project are all developing their own OER strategy or implementing their own OER policy. Of these the Turkish ODL University Anadolu is the ‘champion’ with the announcement in 2008 (on its 50th anniversary) of a comprehensive OER strategy.

An interesting new EADTU initiative, partly financed by a Hewlett Foundation supplementary grant, is to organize an OER Seminar Series. This series consists of three OER Seminars. The OER Strategy Implementation Seminar has already taken place in May 2008 at UK OU, and was mainly targeting the European ODL Universities. Products of this first seminar in the series are available¹¹. Integral cases by UK OU (OpenLearn) and OUNL (OpenER) have been presented and discussed, dealing with such issues as strategy, sustainability, technology, IP, curriculum, academic, participation, quality, and organizational structures. In addition, a participants’ confrontation was set up with various institutional approaches of ODL Universities.

The OER Strategy Development Seminar is particularly meant for regular universities and associations of those universities, providing the sharing of knowledge and experiences resulting from the EADTU/MORIL initiative. K.U. Leuven is the host and the dates are October 28 and 29, 2008.

The OER Capacity Building Seminar, which is to set the stage for OER capacity building on various continents, will start with raising awareness and gathering different points of view, strategies and priorities on OER. This seminar will be organized in close interaction with UNESCO and is scheduled for January 2009 at UNESCO’s Headquarters in Paris.

Finally, in this chapter on further developments after ICDE SCOP 2007 it is worthwhile to note that:

- UNESCO has published an interesting document ‘OER: the Way Forward’, which is the fruit of the community’s collective reflection on how to advance the OER movement: it identifies the key issues, priorities, lead stakeholders, and what to do¹², and is currently available in 13 languages
- One of the TF members, Fred Litto, gave a presentation on the work of the ICDE OER Task Force at the Fifth Pan-Commonwealth Forum on Open Learning (PCF5) in July 2008 in London; this was in an inspiring and well attended session dedicated to OER with other presentations by UNESCO (Susan D’ Antoni), Hewlett Foundation (Marshall Smith, Catherine Casserly), and Vijay Kumar from MIT on the National Knowledge Commission (NKC) in India
- Of course OER will be discussed, evaluated, and advanced as one of the major themes in the upcoming ICDE 23rd World Conference on 7-10 June 2009 in Maastricht, The Netherlands¹³.

¹⁰ See: <http://www.hewlett.org/Programs/Education/OER/>.

¹¹ See: <http://labspace.open.ac.uk>

¹² See: <http://oerwiki.iiep-unesco.org/index.php?title=OER: the Way Forward>.

¹³ See: <http://www.ou.nl/icde2009>.

7 Conclusions and Recommendations

As indicated in chapter 5, here, the conclusions and recommendations of the 2007 SCOP Meeting (as reviewed and adopted by the TF) are presented here in combination with recommendations from the TF for further steps to be undertaken by ICDE.

The ten major conclusions in this Final TF Report are:

1. The primary question is: ‘How can OER contribute in responding to the UNESCO policy of ‘Education for all’, in capacity building, as well as in widening participation and access?’
2. The secondary question is: ‘What role can be attributed to OER in developing or strengthening a knowledge-based society?’
3. Combining the strengths of ODL universities with the OER concept is the most effective method for society to tackle both the primary and secondary questions.
4. ‘Open’ is not equal to ‘free’.
5. It is imperative to keep OER away from a fundamentalist approach or a dogmatic view.
6. Diversity is crucial when considering the potential for OER and opportunities regarding e.g. target groups, goals and ambitions, varying stages of development, national systems, scale and scope, content sharing, and so on.
7. Because of this diversity, international prioritization is difficult and should be brought back to institutional and at most national level.
8. ‘Knowledge is a public good’ and requires public funding.
9. Sustainability is not to be taken for granted and depends on a change in funding schemes (change in weighting of components or additional money).
10. It is necessary to explore the potential and added value of public-private interaction, collaboration, and partnerships.

The eight main recommendations in this Final TF Report are that ICDE and its membership should:

1. Avoid addressing general OER issues as is being done by many others already, but rather concentrate on the self-study and learner-centered approach to OER materials - the ODL flavor of OER as reflected in the profile of ICDE membership institutions.
2. Undertake a more detailed analysis of the diversity regarding OER, the underlying assumptions or grounds and the required variety in actions (e.g. collaboration between ICDE and UNESCO)
3. Develop practical reports or handbooks that relate OER to ODL on themes such as OER implementation, quality assurance, sustainability, adaptation to language/ culture, content and services , IPR/ copyright, all of this based on case studies that can be made available (e.g. from frontrunners in Europe, from EADTU and other regional associations)
4. Exploit the ICDE website as a forum for information exchange and discussion, establish a support centre for the ICDE membership and other mechanisms in order to exchange strategies, policies, best practices, and expertise, as well as to stimulate collaboration
5. Contribute to awareness raising and mobilize political resonance as well as media exposure using ICDE as a brand
6. Make a list of possible concerns (from faculty, students, institutions points of view) that can be expected and formulate responses
7. Develop further collaboration with regional/ continental ODL associations (EADTU, AIESAN, AAOU, ACDE, USDLA, ABED) and other international organizations (UNESCO, OECD, Hewlett Foundation, Open Courseware Consortium, Commonwealth of Learning, SEAMEO)
8. Organize OER Summer Institutes in order to prepare faculty, one per region/ continent in co-operation with the appropriate ODL associations and with selected member institutions

taking the lead; attendance by members of ICDE (at a discount) as well as non-members.

Recommendation (H) regarding the OER Summer Institutes has a natural link with the EADTU Initiative, financed by the Hewlett Foundation, to start an OER Seminar Series in 2008, as discussed in the previous Chapter. The last of the three EADTU OER Seminars is a capacity building seminar for heads of ODL universities outside of Europe in order to reach out to the other continents. It will be held at UNESCO's Headquarters in Paris (where we started the ICDE TF work) in the beginning of 2009 and may be considered to offer an exploratory platform (or prototype) for subsequent regional/ continental OER Seminars (or Summer Institutes). It would be wise for ICDE, EADTU and other ODL associations to join forces in this respect.

Finally, the Task Force recommends to the ICDE Executive Committee to discharge the TF from its duties, to dissolve the TF, and to install a new Task Force with experts from ICDE members that can work on the recommendations provided in this report. The mandate of such a newly formed Task Force should be in agreement with the ICDE Executive Committee.

With respect to this Final Report the Task Force advises the ICDE Executive Committee to publish an appealing public version and to organize political resonance and media exposure around it. This public report should be made available to the press and be disseminated to relevant stakeholders in as many countries as possible with the help of ICDE members.

8 Epilogue: does India show the way?

India has a high-level advisory body to the Prime Minister, the so-called National Knowledge Commission (NKC). NKC has been in operation since October 2005 and has published two annual Reports to the Nation. The follow-up to the reports has shown-according to NKC-laudable support from the government in terms of adopting its recommendations and providing appropriate funding as well. The NKC Agenda places high priority on education as a central instrument for achieving rapid and inclusive growth with specific emphasis on expansion, excellence and equity.

'Report to the Nation 2007' reviews the (earlier) 2006 recommendations and specifies the (new) 2007 recommendations¹⁴. This 2007 set of recommendations covers a wide range of areas: Health information Network, Portals, Legal Education, Medical Education, Management Education, Intellectual Property Rights, Innovation, Traditional Health Systems, and Legal Framework for Public Funded Research, plus two areas that are specifically relevant for this Task Force Report: open and distance education (ODE) and open educational resources (OER).

On page 17 of the report NKC states that 'distance education can provide access to education for a large number of students, including for learners with special need. With the proliferation of media like television, radio and internet, its reach can be significantly increased. NKC recommendations on distance education focus on creating a national ICT infrastructure, developing web-based common open resources, establishing a credit bank and providing a national testing service.'

And on pages 51-52 the NKC report addresses open educational resources. Below we include three interesting quotes...

'Our success in the knowledge economy hinges to a large extent on upgrading the quality of, and enhancing the access to, education. One of the most effective ways of achieving this would be to

¹⁴ See: <http://knowledgecommission.gov.in/reports/report07.asp>.

NKC, its mission and its work was referred to at PCF5 in July 2007 in London through an interesting presentation by Vijay Kumar from MIT (see also Chapter 6).

stimulate the development and dissemination of quality open access (OA) materials and open educational resources (OER) through broadband internet connectivity. This would facilitate easy and widespread access to high quality educational resources and drastically improve the teaching paradigm for all our students.’

‘A set of key institutions should be selected and experts representing diverse knowledge areas like agriculture, engineering, medicine, arts, humanities, science, education, etcetera should be asked to develop standards-based content, which can be customized to diverse user needs. This should be made available not only to Indian institutions but also for global use.’

‘The content in the repositories should be multimedia, interactive and available in different regional languages. These projects should cover a wide range of subjects mentioned above. To speed up the creation, adaptation, and utilization of OER, it is necessary to launch a ‘National E-content and Curriculum Initiative’.’