



Notes from

SECOND EXPERT MEETING ON OPEN EDUCATIONAL RESOURCES

Barcelona 26th—27th October 2006

As a part of the CERI project on Open Educational Resources (OER) a second expert meeting was jointly organised by CERI and the regional government of Catalonia in Barcelona, Spain who were generous hosts. It was a workshop meeting with 31 participants, centred on three themes. The programme and the list of participants are attached as Annex 1 and 2.

INTRODUCTION

The meeting was introduced by Carlos González, Manager of the Free Software Office from the Generalitat de Catalunya, and Tom Schuller Head of OECD/CERI. Mr. González presented some of the work by the government of Catalonia for implementing a knowledge society. Free software, open standards and open knowledge are considered as important elements in that strategy. The government is both using free and open software themselves and is promoting the use of these tools also by others together with diffusion of free content. He concluded that the freedom to use free software remains incomplete if not accompanied by free access to culture and knowledge. Open licenses for software and content should be used, above else when the materials have been paid for with public funds.

Mr. Schuller gave an overview of OECD and the work of CERI in higher education with specific references to the OER project.

1. MOTIVATIONS, BENEFITS AND BARRIERS FOR INSTITUTIONS PRODUCING OPEN EDUCATIONAL RESOURCES

The theme was introduced by Shigeru Miyagawa from MIT, Llorence Valverde from Open University of Catalonia, Patrick McAndrew from UK Open University, and Robert Schuwer from the Open University of the Netherlands.

Three of the presenters came from universities already running OER programmes and one were in the process of designing an initiative. Professor Miyagawa gave insights into the deliberations at MIT before the OpenCourseWare initiative was launched. Although this was in the late 1990-ies and the midst of the dot.com boom it became clear for MIT that starting a business venture selling teaching materials was questionable both on economic and ethical grounds. Instead it was decided to start the MIT OCW website. At the moment almost 80% of the courses currently given at MIT can be found online and about 80% of the faculty members participate in the initiative. The OCW model was chosen since self contained courses is the way education is typically organised in universities. When asked about the benefits for the institution professor Miyagawa responded that the OCW initiative advances the mission of MIT and enhances its image around the world. Furthermore it generates pride among alumni and people working at MIT and stimulates collaboration among faculty. It is also to the advantage when recruiting new students.

The projects at Open University in the Netherlands and in UK are both just starting. They are both formally 2 year projects with among other the purpose of reaching out and attracting new groups of potential students. By lowering the barriers by allowing people to see and test some of the materials the hope at both Open Universities is that groups not previously attracted to higher education will sign up for courses.

Professor Valverde from Open University of Catalonia highlighted the need to rethink the traditional means and channels for publishing and to convert to electronic publishing in order to cut costs and find new distribution channels for learning materials was another theme across several projects. Also the “risk of doing nothing” was stressed – institutions may be left behind if they do not react to changes in time. Finally it was asked what it means today that education should be public and open. Should not the social contract between publicly funded educational institutions and the society include learning materials and other content? As often it became clear that a mix of economic and altruistic incentives is at play simultaneously.

2. POLICY IMPLICATIONS OF OER

The theme was introduced by Øystein Johannesen Min. o Education Norway; José Pessanha European Commission; J Villar Guijarro and J M León Rojas Extremadura; Albert Calvert Catalonia.

The second session focused on the implications for national and regional policy both in terms of policy development and projects carried out to implement these policies. The message that came across most clearly was the importance of not looking at OER in isolation but as a means to promote the use of ICT in education generally and to enhance lifelong learning. This was pointed out both on national level by Mr. Johannesen and in the upcoming educational programmes on European level by Mr. Pessanha. A Norwegian strategy for digital learning resources (both OER and commercial products) will be launched within soon looking both at possible reasons for lack of reuse of learning materials as well as measures that can be taken to improve the situation. This strategy will take a holistic view on learning resources as means to support methodological diversity in education both in higher education and adult learning, it will also aim at the making the national cultural heritage available on Internet, thus putting in practice the earlier mentioned point of considering OER as part of a overall strategy. The Norwegian strategy will also look at implications for licensing regimes and argue for the need of interoperability, issues that was also very much highlighted in projects presented from Catalonia and Extremadura. They also stressed the need to make room for using open content licenses as well as the close connections between OER and Open Source Software and Open Standards. The presentations from Catalonia and Extremadura also demonstrated how OSS, OS and OER can be used as a motor to economic development, to promote eGovernment and popular involvement in the process towards a knowledge society.

The role of government in supporting the OER movement was discussed among the participants. Some argued that government could act as a facilitator without being prescriptive while others asked for a more hidden role for government in order not to interfere and stifle promising developments on local level. The increasing use of OER among self-learners, and increased use of e-learning among companies and organisations underlines the need of a more open attitude regarding accreditation of informal and non-formal learning. Again several participants underlined the holistic perspective – OER must be looked upon in a global perspective of the emerging knowledge society, not only as a technical or pedagogical issue for (higher) education institutions.

Supporting research and development activities for high-quality open content

Marshal Smith and Cathy Casserly gave an overview of the work of the William and Flora Hewlett Foundation in supporting research and development activities for high-quality open content. The foundation has supported initiatives to remove barriers for the OER movement such as: IPR issues and the use of open licenses, localisation and translation of materials, interoperability across tools and platforms, dissemination to new devices such as mobile phones and PDA's and sustainability of OER initiatives.

They identified three particular strengths of OER:

- OER are open for viewing, which means equalization of access to learning;
- OER are open for downloading, modifying and personalisation;

- The ability to rapidly loop OER materials opens for continuous improvement by many small contributions.

They mentioned a promising experiment where advanced instructional design is used to enhance the learning opportunities for the students. In the experiment the students will be given only half the usual time on the course, they will be assessed after two months instead of four. If this turns out positively it could open up a lot of interesting perspectives.

3. USABILITY, QUALITY AND VALIDATION ISSUES REGARDING THE USE OF OER

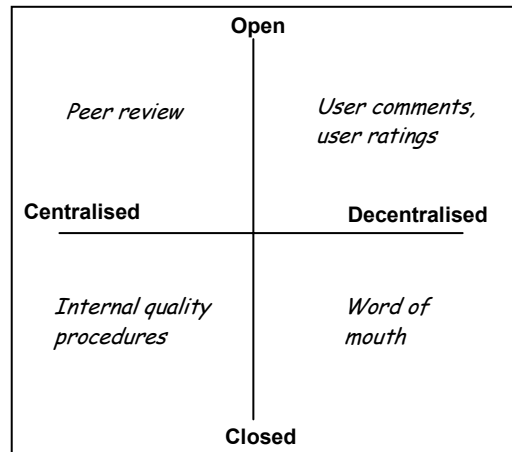
The theme was introduced by Vijay Kumar from MIT and member of the Indian Knowledge Commission, Peter Bateman from African Virtual University, and Ralf Schellhase MERLOT.

The theme of usability and quality was introduced both from the perspective of the user and the provider of resources. In his presentation of the strategy of the Indian Knowledge Commission (IKC), Professor Kumar pointed once again at the importance of taking a more integrated view on OER. The IKC has identified a need for fast expansion of the higher education in their country. In order for the education system to meet the challenges of the 21st century India needs to widening the access and providing quality education. An important part of the strategy is to use open educational resources and high bandwidth networks to serve the knowledge needs of diverse communities, to amplify the interaction among students and teachers and to introduce innovative and interactive educational experiences. Furthermore the IKC advocates that India becomes a member of the Open Course Ware Consortium and leverages on the pool of available OER resources, the development of laboratories accessible through the Internet as well as simulators, grids and portals – among them a national portal for education that would provide a clearing house function identifying and mapping resources for various knowledge areas.

The AVU strategy for enhancing the OER movement in Africa takes a similar integrated view. In the AVU gap analysis they have identified four areas for further work: the need for support from relevant governing bodies, the need to establish clear quality assurance mechanisms and intellectual property right policies, and viable business models. The utilization work stresses the need for online guides and user support, policy development support tools for the development of distance learning, IPR and business models, and communication facilities to support communities of practice in the OER field.

MERLOT, as presented by Professor Schellhase, is a community based portal with some 15 000 “materials” of different kind available without registration for any end user. It is not a repository since it does not contain any resources – it only points to or link to them. MERLOT has some 39 000 members in 15 rapidly growing discipline communities. All members are invited to submit materials and some of them are selected for review. It is a rather traditional peer review done by volunteers who decides individually how many reviews they would like to conduct per year. The reviews criteria are the quality of the content, the potential effectiveness as a teaching tool, and ease of use. The reviews are openly available on the website. In the discussion among the participants this well known methodology for quality control was compared to more decentralised and recent methods such as user ratings of resources. Some of the issues raised were the openness in the selection of reviewers and editors in repositories as well as the possibility to establish the quality of a resource or “material” *per se*, without taking the context of use in consideration. MERLOT offers both possibilities, thus combining a centralised and a decentralised way of quality management (cp. Diagram 1).

Diagram 1: Quality Management Processes



Project presentations: the Open eLearning Content Observatory Services and the CERI study on Open Educational Resources

Viola Naust-Schultz and Veronika Hornung-Prähauser presented the OLCOS project which has a lot of similarities with the CERI study on OER, only it is more practically oriented. One of its aims is to develop an awareness raising video and online tutorials about how to search, produce and modify, share, and publish and license open educational resources. Furthermore it will provide collections of best practice regarding content repositories, institutional policies regarding OER, open licensing approaches and tools and standards for producing OER. OLCOS have also started to look at “driver and enablers” as well as “stumbling blocks” for policies and business models, open educational practices and OER systems and tools. This exercise overlaps with the aims of the CERI study and there seems to be a lot of synergies to take advantage of by working together.

Jan Hylén introduced a discussion on the main findings and preliminary conclusions of the CERI study under five main headings: conceptual issues, mapping OER activities, IPR issues, sustainability, and policy implications. Some preliminary ideas of how to develop the definition of OER further was presented. The mapping activity has been more challenging than anticipated and although it is obvious that the OER movement is growing in terms of number of initiatives, resources available, and users, it is not possible for the CERI study to give any accurate numbers, partly because of the rapid growth of the movement. The main problems regarding IPR is a lack of awareness among faculty staff of the importance of these issues, practical problems related to obtaining rights to use third party materials, and an unclear situation or too strict interpretation of what is “fair use” and “educational use” of digital materials in some countries. Sustainability is more than economics, but it is important to have a viable revenue model. The policy implications of the study were only touched upon but the discussants, Sally Johnstone and Knud Erik Hilding Haman, presented a very promising matrix for analyzing policy implications on different levels. This matrix will be developed further in the course of the project.

Annex 1

Second Expert Meeting on Open Educational Resources

Barcelona 26th – 27th October 2006

Themes for discussion:

1. MOTIVATIONS, BENEFITS AND BARRIERS FOR INSTITUTIONS PRODUCING OPEN EDUCATIONAL RESOURCES

- Financial incentives/barriers for institutions: what is known about the scale of economic benefits and costs, and how can these be measured?
- Pedagogical incentives and barriers: do they exist, and what do they look like?
- Other incentives for institutions, eg outreach to disadvantage groups; what examples are there of this?
- Other barriers than financial: technical, lack of knowledge, lack of interest from staff, etc.?

2. USABILITY, QUALITY AND VALIDATION ISSUES REGARDING THE USE OF OER

- Validation of quality, relevance and usability from the point of view of providers and users.
- Quality management processes

3. POLICY IMPLICATIONS OF OER

- Implications and issues of the OER movement for policy makers on regional and national level.

Programme:

Thursday 26th October

09.00 – 09.30 Welcome and introduction

Carlos González, Generalitat de Catalunya; Tom Schuller, OECD/CERI

09.30 – 12.30 Introductions to Theme 1

S Miyagawa MIT, L Valverde OU Catalunya, P McAndrew OU UK, R Schuwer OU Netherlands. Q&A and discussions

12.30 – 14.00 Lunch

14.00 – 17.30 Panel discussion on Theme 3 introduced by:

Ö Johannesen Min. o Education Norway; J Pessanha European Commission; J Villar Guijarro and J M León Rojas Extremadura; A Calavert Catalunya

17.30 – 18.30 Supporting research and development activities for high-quality open content: an overview

M Smith and C Casserly, Hewlett Foundation

Dinner

Friday 27th October

09.00 – 11.00 Introductions to Theme 2

P Bateman, Virtual African University; V Kumar, Indian Knowledge Commission;
R Schellhase, MERLOT. Q & A and discussions

11.30 – 12.00 Presentation of the OLCOS project

V Naust-Schultz and V Hornung-Prähauser

12.00 – 13.00 Presentation of CERI OER Project and preliminary findings

J Hylén, OECD/CERI, Q&A and discussions

13.00 – 14.30 Lunch

14.30 – 15.30 General discussion and wrap up

Annex 2

**Participants list for
Second OECD expert meeting
Open Educational Resources
Barcelona, Spain**

26 – 27 October 2006

Austria

Veronika Hornung-Prähauser
Salzburg Research Forschungsorganisation
Jakob Haringerstrasse 5/III
Austria
Tel: +43-662-2288-405
Fax: +43-662-2288-222
Email veronika.hornung@salzburgresearch.at

Denmark

Knud Erik Hilding-Hamann
Department Manager
Danish Technological Institute
Teknologiparken, DK-8000 Aarhus C, Denmark
Tel: +45 72201421
Fax: +45 72201414
Email: knuderik.hamann@teknologisk.dk

France

Francis Muguet
Scientifique et coordinateur WSIS-SI
ENSTA & WSIS-SI
32 Blvd Victor
75739 Paris Cedex
France
Tel: +33 1 45 52 60 19
Fax: +33 1 45 52 52 82
Email : muguet@ensta.fr

Germany

Viola Naust-Schulz
FernUniversitaet in Hagen, Germany
Universitätsstr. 11 / TGZ 2. Etage, Raum D 05a
58084 Hagen, Germany
Tel: +49 2331 987 2393
Fax : +49 2331 987 4891
Email : viola_naust_schulz@yahoo.de
viola.naust@fernuni-hagen.de

Ralf Schellhase
University of Applied Sciences Darmstadt
Haardtring 100, 64295 Darmstadt

Tel: +49 6201/876474
Fax: +49 6201/876475
Email: schellhase@h-da.de

The Netherlands

Robert Schuwer
Open University Netherlands
P.O. Box 2960
6401 DL Heerlen
the Netherlands
Tel: +31 45 576 2299
Email: robert.schuwer@ou.nl

Norway

Øystein Johannessen
Deputy Director General
Norwegian Ministry of Education and Research
P.O.Box 8119
Dep Norway
Tel: +4748053342
Fax: +4722242731
email: joh@kd.dep.no

Spain

Josep M Duart
Professor
Director of E-learning
UNESCO Chair
UOC (Universitat Oberta de Catalunya)
Avda. Tibidabo 39
08035 Barcelona
Tel: + 34 932532300
Email: jduart@uoc.edu

Llorenç Valverde-Garcia
Vice-rector of Technology
Universitat Oberta de Catalunya (UOC)
Avda. Tibidabo, 39-43
08035 Barcelona, Spain
Tel: +34932532300
Fax: +34934176495
Email: lvalverdeg@uoc.edu

Orland Cardona Pérez
Txell Collado
Marta Continente
Pere Fabra
Carlos González
Ignasi Labastida
Oriol Lloret
Raquel Xalabarder

Sweden

Yngve Wallin
Programme Manager

The Knowledge Foundation
Box 3222
103 64 Stockholm Sweden
Tel: +46 733 47 81 50
Fax: +46 8 24 75 09
email: yngve.wallin@kks.se

United Kingdom

Graham Attwell
Director
Pontydysgu
6 Courthouse Street
Pontypridd, CF371JW, UK
Tel: +491797650986
Fax: +441443409975
Email: Graham10@mac.com

Peter Bateman
Research Student (OERs)
Open University (UK)
Walton Hall, Milton Keynes, UK
Tel: +254 (0)720 766 563
Email: p.t.bateman@gmail.com or p.bateman@open.ac.uk

Patrick McAndrew
Director of Research & Evaluation OpenLearn
The Open University
Institute of Educational Technology
Walton Hall
Milton Keynes, MK7 6AA. UK
Tel: +44 1908 652638
Fax: +44 1908 654173
Email: P.McAndrew@open.ac.uk

United States

Catherine Casserly
Program Officer
Hewlett Foundation
2121 Sandhill Road
Menlo Park, CA 94025 USA
Tel: +1 650.234.5739
Email: Ccasserly@hewlett.org

Sally Johnstone
Winona State University
55987 Winona Minnesota
USA
Tel: +1 5074575010
Fax: +1 5074575586
Email: sjohnstone@winona.edu

Vijay Kumar
Assistant Provost and Director of Academic Computing

MIT
NE 48, Rm 3009
77 Massachusetts Avenue
Cambridge, MA 02139
Tel: +1 617 253-5023
Fax : +1 617-452-4044
email: vkumar@MIT.EDU
url: <http://mit.edu/vkumar/www>

Shigeru Miyagawa
Professor of Linguistics and Japanese
MIT OCW Advisory Board
MIT
Dept of Linguistics and Philosophy, 32-D886
Tel: +617-253-6346
Fax: +617-258-6189
Email: miyagawa@mit.edu

Marshall S. Smith
Program Director for Education
The William and Flora Hewlett Foundation
2121 Sand Hill Road
Menlo Park, CA 94025 USA
Tel: +1 650 234-4500
Fax: +1 650 234-1930
Email: msmith@hewlett.org

European Commission

José Pessanha
Administrator
European Commission, Directorate General Education and Culture
Unit A4
European Commission,
Office MAD0 08/52 - B 1049 Brussels - Belgium
Tel: +3222987519
Fax : +3222921369
Email : jose.pessanha@ec.europa.eu

UNESCO

Susan D'Antoni
Head of the Virtual Institute
International Institute for Educational Planning
7-9 rue Eugene Delacroix
Paris 75116
France
Tel: +33 1 45 03 77 16
Fax: +33 1 40 72 83 66
Email: s.dantoni@iiep.unesco.org

OECD/OCDE

Jan Hylén
Analyst
Directorate for Education
Centre for Educational Research and Innovation

2 rue André-Pascal
75016 Paris
France
Tel: +(33-1) 45 24 17 06
Email: Jan.Hylen@oecd.org

Francesc Pedró
Analyst
Directorate for Education
Centre for Educational Research and Innovation
2 rue André-Pascal
75016 Paris
France
Tel: +(33-1) 45 24 80 83
Email: Francesc.Pedro@oecd.org

Tom Schuller
Head of CERI
Directorate for Education
Centre for Educational Research and Innovation
2 rue André-Pascal
75016 Paris
France
Tel: +(33-1) 45 24 79 01
Email: Tom.Schuller@oecd.org