Notes from

EXPERT MEETING ON OPEN EDUCATIONAL RESOURCES

Malmö, Sweden 6th – 7th February 2006

As a part of the CERI project on Open Educational Resources (OER) an expert meeting was jointly organised by CERI and the Swedish Knowledge Foundation arranged in Malmö, Sweden. It was a work-shop like meeting with 21 participants, centred on three themes. The programme and the list of participants are attached as Annex 1 and 2.

INTRODUCTION

Christina Ehneström, Programme Director at the Knowledge Foundation welcomed the participants and introduced all of us to the work of the Foundation. Tom Schuller, Head of CERI, made a brief presentation of OECD and the work CERI. Jan Hylén, Project Officer, introduced the participants to the CERI project on Open Educational Resources, with a special emphasis on the conceptual issues. CERI has adopted a two-way approach trying on the one hand to further clarify the wording in definition of OER developed by UNESCO and on the other hand to give further examples of what should be recognised as open educational resources.

Although there was no session designated to discuss conceptual issues, these came up from time to time during the meeting. Some of the experts wanted to widen the concept and beyond static objects or digital resources of a traditional kind, such as text, images, graphics and multimedia. Even if the discussion is restricted to digital media it should be taken into account that the technological development is making it increasingly easy for learners to interact with other learners and subject experts over the internet, to carry out experiments in remote laboratories using so-called web-experiments (not simulations but real experiments in real time), etc. and these are phenomenon that should be considered as learning resources. One observation that kept coming back was that this development might very well challenge traditional ways of learning (meaning formal learning) to the advantage of informal and non-formal learning, and in that context the idea of what constitutes a learning resource might be viewed very different. Other experts raised a word of caution as to widen the concept too much and include too many things under the OER heading, especially different kinds of open source software tools. If the concept becomes too complex it might create new barriers for the understanding of what OER is, rather than the opposite.

Key points to think of and respond to:
- Is the two-way approach adopted by CERI the most promising or are there better ways of approaching the conceptual issues?
- Is it possible to restrict the concept of Open Educational Resources to different kinds of content and exclude software tools used for development, delivery and use of open content?
- Suggestions on how to proceed on either of these routes?

SESSION 1: INTELLECTUAL PROPERTY RIGHTS AND LICENSES FOR OPEN CONTENT

The session was introduced by Professor Brian Fitzgerald, Head of School of Law Queensland University of Technology, Australia and Mr. Richard McCracken, Head of Intellectual Property at Open University in UK.

Many people believe in sharing and want their material to be openly available on the internet for use and reuse by others. The basic reason that IPR issues are of importance for them is that if a license is not attached to the content, a license which clearly states what is permitted use and what is not, people are only allowed to use the material in a very restricted way. By default all intellectual rights of the material is owned by the author. The work done by an organisation like Creative Commons (CC), among others, is to find easy ways, easy-to-use licenses for everyone that wants to share his or her material with others. Furthermore, even if the author is willing to share his content, he might never the less want to stop third parties from making commercial use of the material, without his consent. This can also be done by using a specific open license.

The issue can be raised who should be responsible for the management of copyrights: the individual author, the university where he/she works, or the legal system? The answer is probably – all of them, even though such an answer has a lot of organisational implications.

The growing amount of material available in digital format on the internet has created a totally new situation regarding intellectual property rights. It is becoming increasingly important to have a basic knowledge of IPR to be able to distribute and share digital content in a lawful way. Materials published in one country is just as easily available in other countries with other IPR regimes; the concept of "fair use" is much more difficult to define when you can make an indefinite amount of perfect copies of the digital original, and the idea that materials can be used freely for educational purposes is much more complex when we see a growing amount of informal and non-formal learning via internet. Most of the uncertainties in this area centres on the uncertainty of what kind of use constitutes "non-commercial" or "educational" use. In some countries it is considered as "fair use" as long as the use does not impair the market.

It was also pointed out that the moral rights to a work, the right to be identified as the author and the right to object to derogatory treatment of the work, are distinct and separate from the economic rights embodied in copyright and they are both inalienable and perpetual in many countries. This means that an author may have the possibility to object to some forms of derogative works that he feels to be morally inappropriate. As expected no final solutions to all these questions were offered by the introductory speakers, but the discussion deepened our understanding of this complex area.

Key points to think of and respond to:
- What kind of implications can the notion of moral rights to content or resources have for OER?
- How can the awareness of the importance of open licenses for OER be raised?
- What kind of policy initiatives in the area of IPR could facilitate the growth of OER?

SESSION 2: DEVELOPMENTS AND TRENDS IN THE FIELD OF OPEN EDUCATIONAL RESOURCES
The session was introduced by Professor David Wiley from Center for Open and Sustainable Learning, Utah State University, US.

Regarding the current state of OER it is possible to give quite accurate approximations of the number of resources in repositories. But it was generally assumed that these are by far outnumbered by resources that can only be found by using search engines like Google. This makes it very difficult to estimate both the total number of resources available and how much and by whom they are used. It is clear though that the numbers of resources are growing and that a lot of translation efforts are taking place. But the lack of empirical data on the use of OER, and the inherent difficulties to gather data about this, is not only a problem for the CERI/OER project but for the OER movement at large. It was agreed that a good strategy is needed for how to get a better empirical base for what is known regarding use of OER.

There exist OER initiatives in a number of countries all over the world. There are also some rather large scale translation activities going on, particularly to Spanish, Portuguese, Simplified and Traditional Chinese and to some extent to Korean and Thai. This exemplifies the need to "localise" content, meaning to adapt the resources according to the needs, preferences and cultural preferences of the local user.

On the question whether the OER movement is close to reach "a critical mass", the answer was that it is more important to reach a critical mass of users, than a critical mass of resources. But when this threshold may be overcome, is difficult to say. It should also be noted that at present there is and it will probably continue to be a kind of ecological system with a co-existence of open resources and "non-open" resources.

On the topic of trends it was highlighted that participation in the OER movement is becoming increasingly easy. This is due to several factors such as:
- easier infrastructure or software for managing open resources (such as eduCommons in US, Austria, Netherlands, Japan, China);
- easier licenses (such as Creative Commons and GNU FDL);
- easier production of resources, because of the possibilities to do podcasting, screencasting, videocasting, blogs, wikis etc.;
- easier storage exemplified by Video iPod – a very small device which has the capacity to hold a full academic program of materials;
- easier to mirror repositories which make it possible to use resources without broadband connections (eGranary with approximately 40 partner sites in developing countries);
- easier to create metadata to resources which in turns make resources easier to find and use (exemplified by folksonomies such as Del.icio.us and Flickr);
- easier distribution (RSS and ATOM are techniques which have made distributing and reusing metadata popular); and lastly
- easier to reuse resources because of software that simplifies the assembly, contextualisation and aggregation of resources.

Looking at the future it was predicted that the emergence of PLEs – Personal Learning Environments – will succeed Learning Management Systems or Virtual Learning Environments and at the same time move the power over the learning from the institutions controlling the LMS's to individuals. This may in turn dramatically increase the informal and non-formal learning, both in the form of individual learners and communities of learners, at the expense of today's institutions. If so, issues of recognition and accreditation will be of growing importance.

Key points to think of and respond to:
- What could be important elements in a strategy for a better empirical knowledge on the use of OER?
- How could a research agenda be articulated and promoted in an international context?

SESSION 3: ARGUMENTS FOR INSTITUTIONAL PARTICIPATION IN OER
The invited experts were asked to give their view on why Open Educational Resources are important for higher educational institutions (HEI) and authorities. Why should HEI spend resources on this? Among the arguments put forward it was said that if we look 7-10 years back, the same question was asked by many institutions regarding websites. Today it is almost impossible for a well established institution to be without a good website, even if very few can show that this is a sound economic investment. It was suggested that the same will be true regarding Open Educational Resources in maybe 7-10 years ahead. According to studies 8% of the freshmen in 2003 mentioned the OCW initiative as a factor for their decision to choose MIT, and 36% mentioned the OCW in 2005.

Several arguments were suggested as to why Ministries of Education should take an interest in OER. The main argument was that openness in education and research speeds up innovation, OER can be used to promote life long learning and active self learners, to promote active citizenship and social equity, and to overcome the digital divide. As mentioned before, it was noted that in the context of informal and non-formal learning the conceptual issues – what is really meant by an open educational resource – is brought to a head. Further it was suggested that there are strong moral incentives for being involved in OER – it is "the right thing to do". Other participants pointed the on-going digital development or "revolution" as a more or less inevitable development, in which OER is a part, and asked if one should not turn the question back to institutions asking how much influence they want to have on the changes taking place.

Key points to think of and respond to:
- What could be additional arguments, other than those listed above, for institutions and authorities to engage themselves in OER initiatives?

SESSION 4: MODELS FOR SUSTAINABLE OPEN EDUCATIONAL RESOURCES
The session was introduced by Assistant Professor Paul Dholakia from Rice University, US and Stephen Downes, National Research Council, Canada.

The two speakers introduced two different perspectives on sustainability, which in the discussion that followed crystallised into two different approaches – the institutional approach and the community approach. Although much of the discussion centred on the differences between these two approaches, some participants argued that they should be seen more as ideal models that in reality are surrounded by different kinds of in-between-models.

Since a lot of institution-based OER initiatives have started in recent years, and since the funding available is limited, they compete on scarce resources. In this competition branding, user communities, site usability and the size and quality of the resources offered are all of importance. Community "marketing" is important for the institutional OER initiatives for several reasons:
- It enables users to form strong connections with the website;
- The initiative can learn about what works and what does not work from the community;
- It gives possibilities for rapid diffusion;
- Strong communities influence user behaviours – users come back many times.

For the institutional approach different revenue models were listed and to some extent discussed, such as:
- The *Replacement model*, where OER replaces other use and can benefit from the cost savings which is a result of the replacement. It was noted though that this model has a natural limit since it can only generate the same amount of resources as it replaces.
- The *Foundation, Donation or Endowment model*, where the funding for the operations are provided by an external actor such as foundations. This model was primarily seen as a start up model that will most probably not be viable in the long run. This model was transferred into a *Government support model*, which could be a long-term option in some countries but not others.
- The *Segmentation model*, where the provider simultaneously with resources for free also provides "value-added" services to users segments and charges them for these services – such as sales of paper copies, training and user support, ask-an-expert services etc. This model, together with the conversion model, is among the most used in the education sector.
- *Conversion model,* where "you give something away for free and then convert the consumer to a paying customer".

- The *Voluntary support model*, which is based on fund-raising campaigns. Another version of this model is the *Membership model* where a coalition of interested parties – organisations or individuals – is invited to contribute a certain sum as seed money or on an annual basis.
- The *Contributor-Pay model* where the contributors pay the cost of maintaining the contribution, which the provider makes available for free. This model is used to give open access to scientific publications and might work also for OER.

It was stressed that it is not a matter of one-size-fits-all. Different revenue models can exist side by side, creating a kind of ecosystem. Other models, designed to fit into specific institutional contexts, where also mentioned.

In the second presentation an alternative view was taken on the over-all concept of sustainability. According to this view it is not enough to look at the advantages and disadvantages of different revenue or funding models – one should look not only at who pays for the resources but also who creates them, how they are distributed and how one can work with them. Some of the aspects to consider are:
- Technical considerations such as discoverability of the resources;
- The kind of openness and constrains on access and use that is given users;
- Different content models (the possibility to localise content) and issues of licensing;
- Different staffing models and incentives for people to contribute resources;
- Alternative workflows to the traditional design—use—evaluation model, to models without a clear distinction between production and use or between the user and the producer. The concept of co-production is important here.

The community approach to open educational resource initiatives is more of a grass root activity where individuals contribute on a voluntary basis. In this model production, use and distribution is decentralised compared to the institutional model where at least production and distribution are centralised. Since the community model builds on voluntary work, sustainability is not so much a matter of financial resources as of getting rid of barriers that hinders communities to grow (such as the existing IPR regime or a mind set of donators where only institutional OER initiatives exists).

It was agreed that it is difficult or even impossible to plan or create a community from top-down; it is rather a matter of giving recognition and support to existing embryos of communities. If such an embryo is carefully watched and then supported in the right moments, it might grow and become strong. One should remember that "a website is not a community".

It was also proposed during the discussion that it could be a need for three different kinds of portals or directories:
- The first being a directory of "raw" OERs, akin to the directory of Open Access Journals, a first try could be found at http://oer.wsis-edu.org/doer.html;
- The second one a Directory of tutoring offers (whether online or not) that works with OERs; offers for free, non-profit offers but not free, and maybe commercial offers;
- The third could be a directory of evaluation services, diploma granting institutions that accept to organize exams and deliver diploma for student that did not follow courses at the institution.
If these three offers are combined (OERs + tutoring + exam) that could be seen as e-learning offers.

Key points to think of and respond to:
- To what extent are the institutional model and the community model for OER initiatives compatible and to what extent do they compete?
- Are there other sustainability models that could be interesting?
- Are there other revenue models within the institutional approach that could be of interest?

ANNEX 1

Expert Meeting 6-7 February 2006

Monday 6th February

9.00 – 9.30   Welcome by Christina Ehneström, Knowledge Foundation
               Presentations of CERI and of the OER project (including conceptual issues) *(Tom Schuller and Jan Hylén OECD / CERI)*

9.30 – 10.00   Presentation of participating experts

10.00 – 10.30 Coffee break

10.30 – 12.30 Session 1: Social, cultural and learning aspects of open licenses *(Introduced by Richard McCracken, Open University UK and Brian Fitzgerald, Queensland University of Technology Australia)*

12.30 – 14.00 Lunch

14.00 – 15.00 Session 2: Recent developments in the field of OER, followed by discussion *(Introduced by David Wiley, Utah State University)*

15.00 – 15.30 Coffee break

15.30 – 18.00 Session 3: Social, cultural and learning aspects of open licenses (continuation)

18.00 – 19.00 OER Advisory Group Meeting / Free time
19.00   Dinner: Dinner speech: Presentation of LearnIT by *Ove Jobring, Gothenburg University*

Tuesday 7th February

9.00 – 10.30   Session 4: Sustainability issues *(Introduced by Paul Dholakia, Rice University US; and Stephen Downes, National Research Council, Canada)*

10.30 – 11.00 Coffee break

11.00 – 12.30 Session 5: Sustainability issues (continuation)
12.30 – 13.00 Closing session

13.00 – 14.00 Lunch and end of meeting

ANNEX 2

List of Participants

Attwell, Graham Pontydysgu UK

Boman, Magnus SICS, Sweden

Borst, Timo Fernuniversitet Hagen, Germany

D'Antoni, Susan UNESCO/IIEP

Dholakia, Paul Rice University, USA

Downes, Stephen National Research Council, Canada

Ehneström, Christina Knowledge Foundation, Sweden

Fitzgerald, Brian Queensland University of Technology, Australia

Hilding Hamann, Knud Erik Danish Technological Institute

Hylén, Jan OECD/CERI

Jobring, Ove Gothenburg University

Johnstone, Sally WCET

Lindqvist, Maria Ministry of Education and Science, Sweden

McCracken, Richard Open University, UK

Muguet, Francis ENSTA, France

Paulsson, Stefan Hyperfinder, Sweden

Pedro, Francesc OECD/CERI

Schuller, Tom OECD/CERI

Tuomi, Ilkka Oy Meaning Processing Ltd, Finland

van Assche, Frans European Schoolnet, Belgium

Wallin, Yngve Knowledge Foundation, Sweden

Wiley, David Utah State University, USA