

ExplORer

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Recommendations for Policies Supporting Reuse of Open Educational Resources 04



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1. Recommendations for Policies Supporting Reuse of Open Educational Resources

The Open Education model assumes that by providing Open Educational Resources and encouraging their reuse, education can be made more accessible and the universe of what is possible in education can be expanded.

Policies, adopted at European, member state or institutional level, constitute a key mechanism through which the reuse of Open Educational Resources (OER) can be promoted and supported. They are a necessary element of a transformation of the educational system towards the open educational model. In such a model, the open availability of resources creates potential for empowerment of educators and learners, and greater effectiveness of educational institutions. Without such policies, all bottom-up efforts will never reach a necessary scale.

For the last 10 years, much of the OER policy efforts have focused on open licensing policies. We believe that it is today necessary to extend the scope of such policies, to support a whole OER ecosystem that includes:

Users – by providing awareness of OER and the motivation to use it;

Content – by providing open content that users want, and infrastructure supporting finding, use and reuse (adaptation) of resources

Context – by nurturing communities and providing systemic support that will sustain OER

To this end, a mix of **passive** and **active** OER policies is necessary.

Passive OER policies ensure open availability of content by ensuring necessary legal standards and technical infrastructure for making content available. Through such policies, the potential for reuse of educational resources can be provided. Among these, **strong open policies** are crucial – those that secure, at legal level, full reuse rights, for any purpose, including commercial uses.

Active OER policies build on this potential and directly support engagement of educators and learners with Open Educational Resources, through creation, use and reuse of resources. They constitute a spectrum of policies through which educational change happens thanks to openly shared and reused resources. These could include incentives for teachers to create, reuse and share OER, investing in repositories and other types of

infrastructure for discovery and analytics of content, or paying attention to digital literacy of teachers and formulation of new pedagogies.

2. Passive policies

Recommendations on open licensing and legal aspects of Open Educational Resources

Open licensing of educational resources financed from public funds should be seen as the basic standard that ensures availability of a broad range of Open Educational Resources. Such open licensing policies are encouraged by the Paris Declaration on open educational resources¹, of which most European states are signatories. Widespread implementation of this standard ensures maximization of the potential of both the public funds involved and the educational materials created.

We recommend:

1. Introducing policies that ensure open licensing of educational content financed from public funds. Ensuring openness of public educational resources is a necessary action, enabling full use of their potential. Educational resources should be free (no cost) for anyone to access and to legally modify (according to the 5R activities model²: retain, reuse, revise, remix, redistribute).

All publicly funded educational resources which are copyrightable works, subjects of neighbouring rights or databases should be disseminated under Creative Commons Attribution license or another open license (compliant with the Open Definition³) for unlimited, free and non exclusive use of resources or their potential modifications.

The obligation to share content under an open licence should be supplemented with standards which guarantee technological openness of content, through the use of adequate open file formats. All publicly funded educational resources should be accessible in at least one open format, whose full specification is available to use without substantial technical or legal limitations.

¹ <http://www.unesco.org/new/en/communication-and-information/access-to-knowledge/open-educational-resources/what-is-the-paris-oer-declaration/>

² <http://www.opencontent.org/definition/>

³ <http://opendefinition.org/>

Furthermore, accessibility for people with special needs should be ensured. Resource creators should follow current guidelines on facilitating access to content published on the Internet – Web Content Accessibility Guidelines (WCAG).

Legal regulations should furthermore ensure that public educational resources will be shared through a publicly available educational platform (described in the infrastructural recommendations).

Open licensing policies should be implemented by member states for resources funded from national budgets. Furthermore, open licensing requirement should apply to European educational funding. This requires a better defined open licensing standard within the Erasmus+ program. Furthermore, open licensing policies can be applied at national level to structural funds, in those member states that benefit for them. A model policy that requires open licensing of educational resources funded with funds from the European Social Fund has been introduced in Poland in 2015.

2. Regulation of the issue of sharing resources created by teachers. The system of education should support teachers creating their own resources, so that they can share them and benefit from such sharing. This often requires clarifying the issues of copyright ownership for works created by teachers within the scope of their work, so that necessary rights and permissions are secure to enable open sharing of such resources. Furthermore, this may require providing a standardized licensing framework that can be employed by teachers wishing to share their resources. While we do not recommend making such sharing obligatory, policies should encourage and support teachers willing to do so. A model policy supporting sharing of Open Educational Resources by teachers has been introduced in the city of Leicester, United Kingdom, in 2014⁴.

3. Ensuring legal availability of other types of resources indispensable in teaching.

The open licensing recommendation focuses on educational resources – such as textbooks, lesson scenarios, additional teaching resources, etc. But educators use a range of other resources that are not strictly speaking educational resources, but are indispensable in teaching. These include most prominently cultural heritage, but also a range of useful scientific resources, public data, etc. Use of such resources can be supported by:

- ensuring string educational exceptions to copyright that will provide educators with a broad range of rights to use resources for educational purposes. Such exceptions will

⁴ <http://www.digilittleic.com/?p=605>

also limit the scope of uncertainty regarding legal status, which might limit the scale of use of content;

- supporting and strengthening the public domain as a pool of resources that can be both freely used in teaching and combined with Open Educational Resources to create new or improved educational content
- obtaining proprietary copyright to key resources that are indispensable for teaching, with the aim of sharing them under open rules.

Recommendations on OER infrastructure

Open educational resources are most of all digital resources, thus the main economic benefits connected with them depend on providing teachers and pupils with adequate infrastructure and proper equipment. Most prominently, an online educational platform is necessary to provide availability and ensure discoverability of resources. Providing adequate access infrastructure and equipment are supportive measures.

We recommend:

1. Creating, at both member state and European level, Open Educational Resources platforms. One of the key limitations in using open educational resources is low level of knowledge of sources where such resources can be found, as well as challenges related to their discoverability. The situation can be significantly improved by creating publicly accessible free platforms for publishing and reusing Open Educational Resources.

Core repositories should be created at national level and enable both storing and publishing resources on the platform, as well as aggregation of distributed resources available from other sources. A similar repository should function at European level, in order to publish and aggregate Open Educational Resources created within the scope of the Erasmus+ program, and any other educational funding schemes.

Most importantly, such platforms should not only provide access to Open Educational Resources, but also enable reuse, modification and improvement of resources. Furthermore, platforms should allow for decentralized publishing of resources in a “User Generated Content” model, by providing authoring tools. These could be used in particular by teachers to share their resources.

2. Providing all schools with proper Internet infrastructure. Lack of adequate

infrastructure is a considerable obstacle limiting digital education in general, and in particular full use of open educational resources. It is indispensable to provide all schools (and other institution

3. Providing basic digital equipment for teachers. Universal use of open educational resources in the education system depends to a large extent on individual teachers. Each of them should be provided with basic equipment which allows the use of digital resources in teaching, including open educational resources. At a minimum, this should include a personal computer and / or a tablet. Adequate peripheral devices should be provided in teaching institutions, to enable use of digital resources in teaching.

3. Active policies

Recommendations on teacher training and awareness raising

Legal and infrastructural recommendations concern primarily the issue of creating and sharing open resources – and in this sense constitute passive policies that secure the potential for the reuse of OER. Active policies, defined by following recommendations on teacher training and awareness raising, constitute a core, indispensable element of open educational policy. These recommendations aim at motivating and supporting educators to more widely use, modify and further disseminate Open Educational Resources. It should be noted that introduction of policies alone will not secure increased engagement and activity of educators and learners. Policies should be seen as a supportive measure for educational change in this regard. Actual implementation of these policies throughout the educational system is also a crucial factor for increasing reuse of educational resources.

We recommend:

1. Supporting teachers' professional development programs devoted to creation and reuse of OER. Throughout Europe, educators lack systematic knowledge on creation and reuse of Open Educational Resources. More generally, they often lack necessary digital competences and skills, which are in particular needed to become engaged in the open education model. Development of OER competencies should be a core element of all media and digital literacy programs.

It is necessary to define a catalogue of such competences and skills, and on its basis develop programs within the scope of pedagogical education and professional development of teachers. Such a catalogue should include: knowledge on copyright and using open licenses, technical skills related to effective publication and reuse of educational resources, expertise allowing individual assessment of OER quality, skills related to using OER in the classroom and adapting them to learners' needs.

Such training programs should constitute a core part of broader programs and policies aimed at raising the level of teachers' digital expertise. OER training program should be made compatible with the European general framework for digital competences, DIGCOMP⁵.

⁵ <https://ec.europa.eu/jrc/en/digcomp/digital-competence-framework>

2. Supporting teacher experts in specific fields in creating Open Educational Resources for their specializations. Expecting all teachers to be experts on all aspects of their subject is not only unrealistic but also ineffective from the perspective of using their talents as creators of educational materials and teaching methods. Instead, selected teachers should be supported in achieving a position of methodological experts capable of creating original, interesting, high quality Open Educational Resources. Such experts can furthermore support other teachers in reusing OER, and the resources created by experts can serve as basis for new resources based on their reuse. Such a solution can also help develop educational leaders by raising prestige and enhancing teachers' public image.

3. Introducing a gratification system for teachers, for creating open educational resources. Today, preparing open educational resources by teachers is not rewarded in any way. Formal recognition and rewarding for creating Open Educational Resources could speed up the creation and reuse of such materials. It could also encourage teachers to open up existing resources. Such gratification should at best be part of official systems for certification or promotion of teachers and other educators. Additionally, member states could provide funding for the creation and reuse of OER by teachers, for example in the form of open grant competitions.

4. Introducing quality assessment programs for OER. Lack of easy quality assessment is an obstacle in using and developing Open Educational Resources. This issue can be solved by creating public quality assessment programs for OERs, whose job would be to verify existing and newly developed OERs – or at least core resources (for example open textbooks). Quality assessment programs should also be easily accessible to teachers who create OERs.

5. Providing legal support on copyright issues for educators. Teachers and other educators have a low level of knowledge of the copyright law, including regulations applying directly to their work (such as educational exceptions). At the same time, reuse and publishing of educational resources is often limited by uncertainty related to copyright. Educators should therefore be provided with practical support, including a knowledge base, ongoing training (including e-learning) and consultations with experts. A best practice example in this regard is the Australian Smartcopying portal⁶, created by the National Copyright Unit, which is part of the Australian education system.

⁶ <http://smartcopying.edu.au/>

6. Training as a necessary element of all open licensing policies. Open licensing rules are often a new and not well understood requirement for institutions and people responsible for their implementation – for example by grantees of government grant programs. Training and support activities should therefore constitute an obligatory element of any open licensing policy.

7. Community building as a necessary element of OER repository programs. OER platforms will succeed only if they are supported by a community of active users who contribute to the development of resources on the platform. Best practices, such as the Belgian KlasCement project⁷ or the Norwegian NDLA platform⁸ show that viable platforms are community-driven. This applies in particular to reuse of resources made available on the platform.

Recommendations on OER Coalitions

Over the last decade, national OER coalitions have been formed throughout Europe to support development of Open Educational Resources and open education in general. They have a potential to provide a platform for cooperation for entities and groups working at various parts of the policy process – think tanks, activists, practitioners, associations of stakeholders (teachers, parents), etc.

These coalitions usually serve a double function:

- They advocate for and support the development of OER policies by public institutions;
- They build a grassroots community of OER advocates, experts and practitioners.

In this way, OER coalitions provide a proven model of combining and coordinating systemic-level and grass-root efforts to implement OER. OER Coalitions usually are created as a grassroots effort, but aim to cooperate with the government and public institutions, and to support their activities. As such, they have been playing a crucial role in supporting development of OER policies.

While the development and sustainability of OER coalitions largely depends on grassroots resources, policy measures can be introduced as support measures.

⁷ <https://www.klascement.be/>

⁸ <https://ndla.no/>

We recommend:

1. Providing support for further development and sustainability of OER coalitions.

Such support can be provided within the scope of the Erasmus+ program, or at the level of individual member states. Furthermore, both the European Commission and member state governments should aim to build ties with OER coalitions while working developing and implementing OER policies.

2. Building ties between OER coalitions and broader digital literacy coalitions. OER policies should be supported by broader coalitions on Digital Skills and Jobs, which have been forming at member state level throughout Europe. The European Digital Skills and Jobs Coalition should constitute a forum for debating OER policies in the broader context of digital skills and digital education.