Observations and Reflections on an OER decade in Europe: OER adoption by governments

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First OER Initiatives in Europe (2006)

OpenLearn @ OU in the UK
(Hewlett Foundation funded)

OpenER @ OU in the NL
(funded by Hewlett Foundation & Government)

*Both exploring the potential to combine the new **digital openness** (OER) with the OUs **'classical' openness** (Open Education):*
> a very small part of their course bases <
> lifelong learning, widening participation <
> bridging between informal & formal learning <

Emerging National OER Policies

2007 – ..... / *India* (no clear budget up-front)
NKC / Report to the Nation 2007: Embracing OER
Launch of a 'National E-content and Curriculum Initiative'
Good intentions for a major effort, but …

2009 – 2013 / *The Netherlands* (€ 8,0 million)
National Wikiwijs Program (OUNL & Kennisnet leading)
***Mainstreaming OER** in all educational sectors, but …*

2011 – 2014 / *USA* ($ 2,0 billion)
US Dept. of Labor and Dept. of Education run a
4-year Program to create ***OER (CC BY licenced) for***
***Community Colleges and Career Training, but …***

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Meanwhile other countries promote OER through …

> specific measures <
> provision for collaboration <
> financial project support <

… or are considering a *national approach* to OER

.... partly inspired by ....

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e.g. Brazil, Canada (BC and Alberta), China, **Germany**, *Indonesia, Japan, Kenya, Korea, Mongolia,* **Poland**, **Scotland**, **Slovakia**, **Slovenia**, *South Africa, Turkey,* **UK**, *Vietnam*
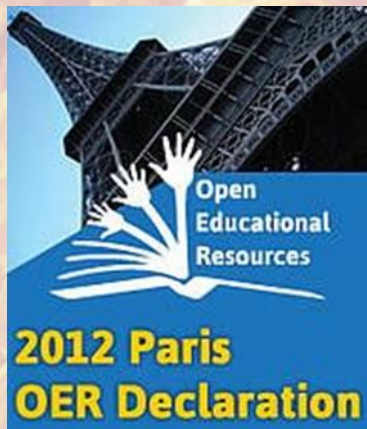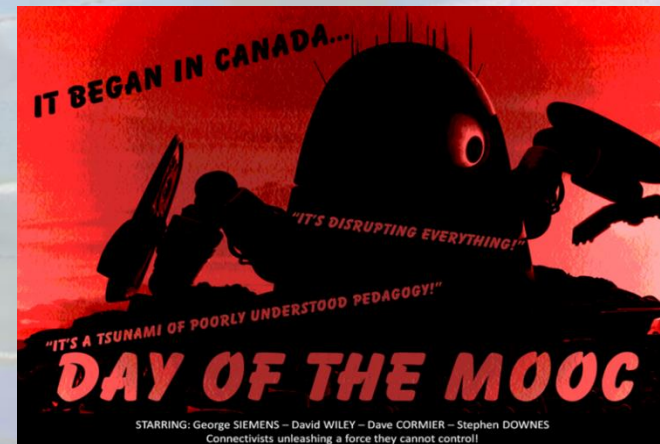
The MOOCs have come in
Massive Open Online Courses

Courses: courses, mostly in a fixed schedule of n weeks, to be completed with a certificate of participation (and sometimes - through third parties, proctored and with a fee - with a for-credit-certificate)

Online: through internet, generally based on video lectures + facilitated interaction + automated feedback and self-tests

Massive: many participants: the first xMOOC had 160.000, *but meanwhile after the enormous MOOCs expansion …*

Open: freely accessible (no fee, no entry requirements), independent on place and time, *but really 'open' implies much more than this …*

IT BEGAN IN CANADA…

"IT'S DISRUPTING EVERYTHING!"

"IT'S A TSUNAMI OF POORLY UNDERSTOOD PEDAGOGY!"

DAY OF THE MOOC

STARRING: George SIEMENS – David WILEY – Dave CORMIER – Stephen DOWNES
Connectivists unleashing a force they cannot control!

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… and expanded, also in Europe

MOOCs predominantly US
where it got a real boost *in 2011/12* and expanded massively,
and which houses the major providers *Coursera, edX (Udacity)*

Response in Europe …
Some universities *joined US initiatives*,
others started their own operation

Country/language-based platforms (2013):
FutureLearn (UK), MiríadaX (Spain),
iversity (Germany), FUN (France), …

OpenupEd is an initiative on a *broad European base*
(April 2013 / EADTU & 11 partners, mostly OUs / 12 languages /
referatory portal / 8 common features / value-driven)

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Better not ignore the MOOCs …

Serious criticism from the OE(R) community

e.g. at the 2012 OpenED Conference there was no MOOCs keynote and if there was attention this was negative, jokingly or even downgrading

Yes, MOOCs are generally not as open as …

should be in OE: no reuse, revise, remix, redistribute
would be desirable: not the full benefits of open licensing
could be in learning: basic pedagogy, no advanced features

But MOOCs are an important change agent,

because many *top universities* and staff are involved, confirming the educational *quality* that can be achieved *online*, much broader *appreciated* than OER among *politicians*, contributing to the required *momentum* and feelings of urgency

Thus, incorporate MOOCs, but …

… be aware that this ***primarily*** makes sense for ***tertiary education***, not for primary and secondary education

… let this only apply to ***OER-based MOOCs***, in order to gain the ***full benefits*** of openness for learners, teachers and societies

… let ***governments*** become convinced that not the MOOCs instrument but the ***OER*** concept is the ***proper carrier*** to really open up education, thereby maximizing its potential benefits

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2013 / EU: *'Opening up Education'*

> Relevant (although late) and Significant <

> Not only Words, also Budget (2014-2020) <

> Broad Scope (DGs CONNECT + EAC) <

Innovative teaching and learning for all through ICT

Reshaping/modernizing EU education through OER

Digital competencies, infrastructures, interoperability

Equity, quality, visibility, licensing, certification

Concerted effort / integrated approach

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INSPIRING!   *PROMISING!*

2017 / EU-OuE: *current state*

> Many funded projects for OER, MOOCs, OuE <
*… but where does this go in its **fragmentation**, with **no** overall **goals**, coherence, and **impact** orientation?*

> Portal OpenEducationEuropa (OEE) <
*… but OEE meanwhile has its **focus** much more on **digital, online,** innovative education than on OER*

> IPTS has published a set of relevant reports <
*… but a shift is observed to the **'catch-all'**, not very distinct concept of **Open Education** (incl.MOOCs)*

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EC shows rather indifferent now   *Publishers stay pretty resistant*

Slovenia as a shining example?

April 2014 – … / Openingup*Slovenia*

*The idea: <u>OuS</u> is a **bottom-up** created and **top-down** supported new and innovative initiative in which Slovenia as a first European member state will attempt to create a unique **nationwide test-bed** environment in **open education***

Favorable precondition fulfilled:

*All relevant stakeholders involved: **government**, **education** (all sectors), **academia** (research), **technical** and **industry partners***

BREAKTHROUGH?

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Five carrying Reflections
from Wikiwijs (NL), OuE (EU), OuS (SI), …

1 Bottom-up activities, important as they are, will **not** lead to country-wide **OER mainstreaming**

2 A **committed government** is required, with an **OER policy**, concrete actions, and dedicated measures

3 It's a **long-term** process that needs **patience**, determination, and **perseverance**

4 A **critical success factor** in this major change for **teaching staff** is their **skilled adoption** of OER

5 A **precondition** is to abandon compromising between open and 'closed' learning materials, and invite **publishers** to really enter the **'World of open'**

But WHY??? - Views on OER …

… not just *"stuff on the web"*

… different from *"learning objects"*

… different from *digital learning materials*

… seldom *Massive Open Online Courses*

… one element in *Open Education*

5COE Model (OE-Pentagon)
- Open Educational Resources
- Open Learning Services
- Open Teaching Efforts
- Open to Learners' Needs
- Open to Societal Needs
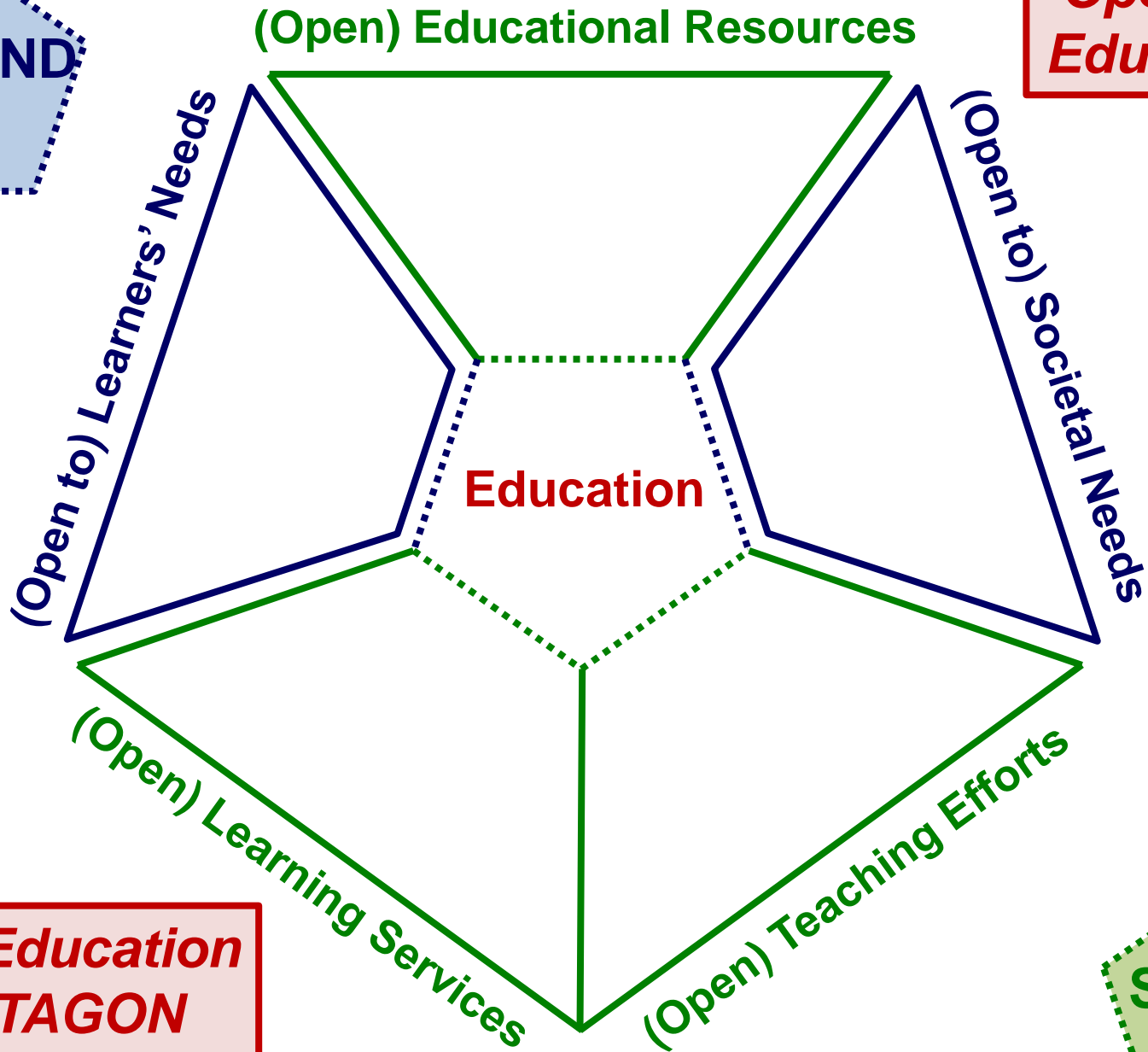
(Mulder & Janssen 2013, 2015)

OECD
BETTER POLICIES FOR BETTER LIVES

REPORT (Dec 2015)
'OER: a Catalyst for Innovation'

DEMAND

(Open) Educational Resources

Opening up Education ...

(Open to) Learners' Needs

(Open to) Societal Needs

Education

(Open) Learning Services

(Open) Teaching Efforts

Open Education PENTAGON (Mulder 2017)

SUPPLY

What about 'Open' in OER?

*"**OER** are teaching, learning and research materials in **any medium**, digital or otherwise, that reside in the **public domain** or have been released under an **open license** that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions."* **(UNESCO)**

*"**Open licensing** provides users with free and perpetual permission to engage in **five 'R' activities**: reuse, revise, remix, redistribute, and retain."* **(Wiley)**

Evident relevance:

> much more than giving access
> fair regulation in internet 'jungle'

What is special with OER?

Open Education is no new doctrine for all to follow. The strong societal wish for diversity is to be cherished, and each institution can choose its own specific profile in terms of the degree of openness (0-100%) in those five components.

THE SINGLE EXCEPTION is OER:
It has been argued that 100% OER is what all institutions and teaching staff could aim for: major benefits will appear regardless of the diversity in institutional identity, learning philosophy, target groups, educational sector, even political context.

Open Educational Resources

OER is a *no-regret* option for all:
institutions, teachers, and learners

And what about Governments?

Governments have a threefold *responsibility for education* and its system, that is to *promote and ensure*

> *accessibility* <

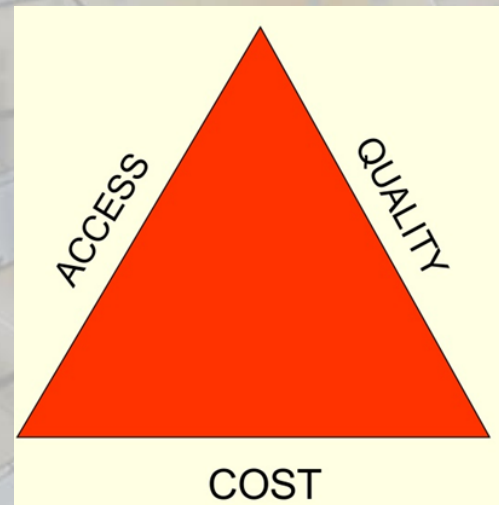> *quality* <

> *efficiency* <

in a *sustainable* manner

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Iron Triangle for Education
(Daniel, Kanwar & Uvalić-Trumbić 2009)

Three performance indicators :
access quality

        cost

The ***triangle is called 'iron'*** *because improving on one of the three indicators will generally lead to a decrease in performance on one or both of the other indicators (with no budget change): a **deadlock***
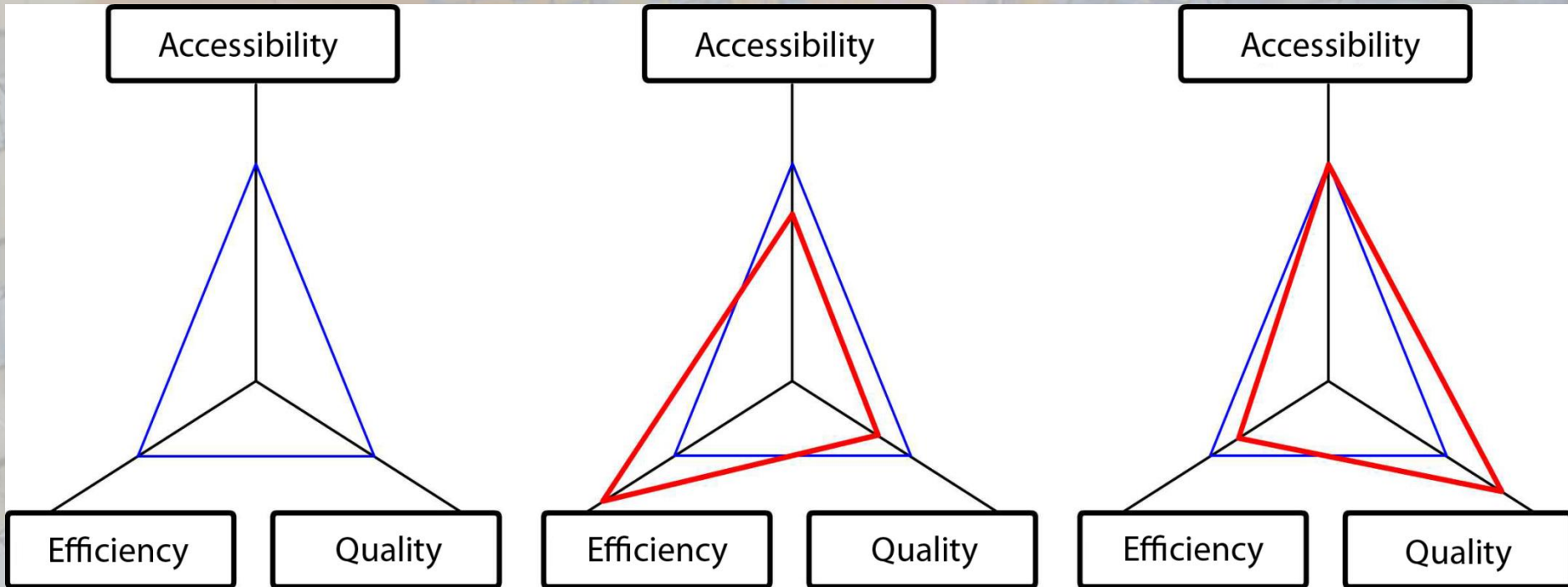
The ***challenge*** *is to find a way to **break out** of this **'Iron Triangle'** for education. Daniel et al. proposed the **use of ICT or ODL** to this end*

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Iron Triangle revisited …
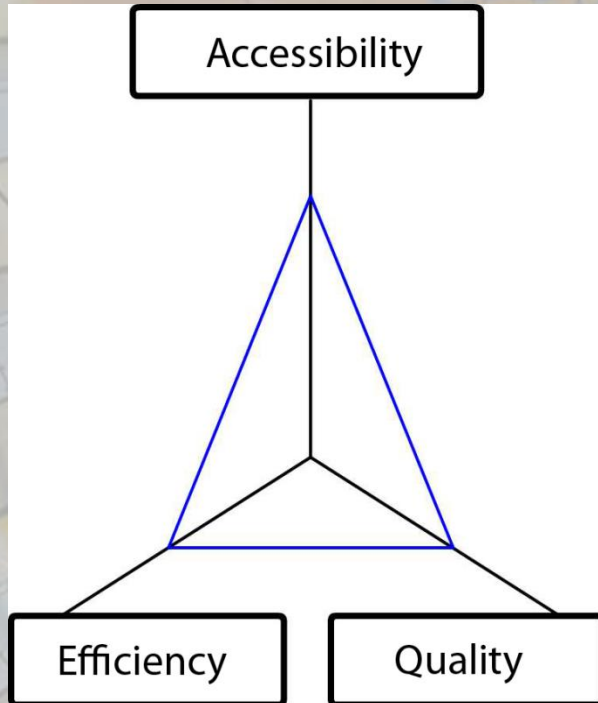

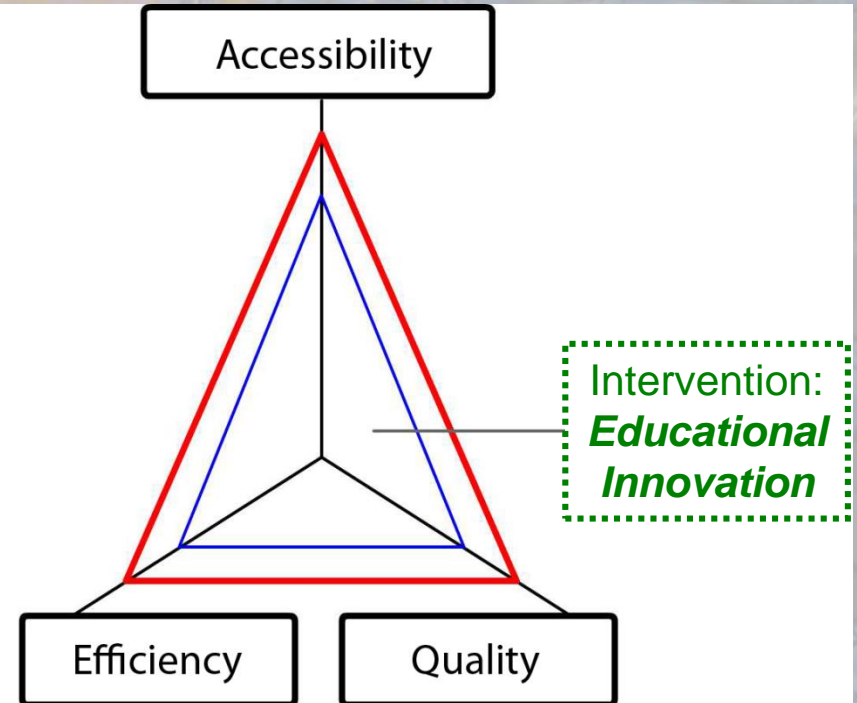'Starting situation' 'Increased efficiency' 'Higher quality'

*Maintaining the **powerful message** but with adaptations:*
*> modified into a **3D model** to solve the planar triangle flaw*
*> **'accessibility-quality-efficiency'** vs 'access-quality-cost'*
(Mulder 2010, 2013)

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Iron Triangle revisited …

'Starting situation'

'After the intervention'

Intervention: *Educational Innovation*

*The **deadlock is broken** by an intervention, resulting in a **simultaneous improvement on all three** performance indicators*

'Iron Triangle Scan'
for educational innovations (Rikers & Mulder 2017)

In the *'Iron Triangle Scan'* we *assess* educational innovations along the three performance indicators: *accessibility, quality, efficiency*

This is complemented with a *check on diversity* which should be maintained as a *fundamental value* for education and the *educational system*

With the *three* performance *indicators all raising* and *diversity not at stake*, the innovation is passing the Scan favorably and is a *no-regret* option *for governments*

Disclaimer: the scan is not an objective measurement based on firm evidence but more a screening mechanism using sound argumentation. It derives its significance from hypothesizing on fair grounds which is open to inter-subjective reproduction / verification / falsification

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'Iron Triangle Scan' applied
to various educational innovations

(Source:Rikers & Mulder 2017)	Open Education (component-wise)	Education for Sustainable Development	MOOCs ('representing' Online Learning)
Open Educational Resources **(OER)**	**NO-REGRET**	*(DESIRABLE)*	**WEAK MATCH**
Open Learning Services **(OLS)**	**DESIRABLE**	*(Indifferent)*	**DESIRABLE**
Open Teaching Efforts **(OTE)**	**DESIRABLE**	*(Indifferent)*	**DESIRABLE**
Open to Learners' Needs **(OLN)**	**NO-REGRET**	**NO-REGRET**	*(Indifferent)*
Open to Societal Needs **(OSN)**	**NO-REGRET**	**NO-REGRET**	*(Indifferent)*

The outcome relevant to governments can be …
… a strong **NO-REGRET** *('no doubts')*
… a weaker **DESIRABLE** *('it depends')*

Final and overall Reflections [1]

Governments can see logic to embrace and mainstream OER in all education by a determined implementation of an inspiring and supporting governmental OER policy

In such a clear and secure context educational institutions and their teaching staff can feel a proper driver to heartily work in the OER style, in line with the sharing principle
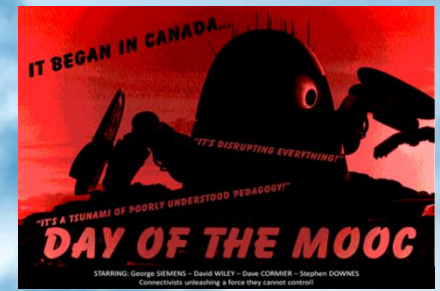
All stakeholders - learners, teachers, educational institutions and society at large - will benefit through better accessibility, higher quality and lower cost of learning materials in a sustainable way

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Final and overall Reflections [2]

These benefits profoundly favor SDG4 and the theme for the Regional Consultations: 'OER for *inclusive* and *equitable quality* education: from commitment to *action*'

The current trend of increasing *protectionism*, we-first, and national autonomy might require a *change in tactics* on the OER road: (keep) *focus on national* (less on Europe?) and *diversity* (in language, culture, educational context) while *not abandoning overall* efforts, opportunities, prospects

And *'yes'*, let's work on coalitions with *other 'open movements'*: open access, open science, open data, open governments, … (national and cross-national)

THANK YOU!
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