

Impact of International Organizations on Governmental OER Policies

PhD Research Presentation, OCWC Global Conference,
23-25 April 2014, Ljubljana, Slovenia

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Open Sharing, Global Benefits

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PhD Research Topic

Impact of International Organizations on Governmental OER
Policies

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Why Focus on OER?

OER can make education:

- More Accessible
- Affordable
- Efficient
- Contribute to improved quality
- Sustainable

While, at the same time, contributing to:

- widening access
- expansion of lifelong learning opportunities

(Mulder, 2012; Ngugi & Butcher, 2011; Dhanarajan & Abeywardena, 2013; OECD, 2007; Hewlett Foundation, 2013; Hylén et al., 2012).

Since 2002, thousands of resources released as OER

Why Focus on OER Policies?

OER policies (at provincial, state and/or national levels) are needed in order to advance mainstreaming and uptake of OER practices (openness in education)

(Mulder, 2013; Bossu et al., 2012)

Why Focus on Governmental OER Policies?

- In the context of widespread budget cuts, growing demand for education, and rising cost of education, governments are searching for new and innovative ways to address the growing demand for post-secondary education while making education more affordable, accessible and of better quality.
- Governments around the world have been proposing strategies or approving policies related to OER (India, Netherlands, Indonesia, USA, Brazil, etc).

Recent Governmental OER Policy Developments

- Slovenia: Launch of OpeningupSlovenia
- Scotland and Wales
- Canada: Three provinces: British Columbia, Alberta and Saskatchewan
- South Africa

Recent Governmental OER Policy Developments

Launch of OpeningupSlovenia

Union Hall, April 23, 2014
Track: Panel



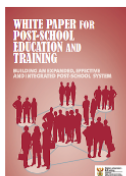
09:10 – Addressing the initiative “Opening up Slovenia”
Jernej Pikalo – Slovenian Minister for Education



http://conference.ocwconsortium.org/2014/a1ec_event/openingslovenia/?instance_id=446

White Paper for Post-School Education and Training

CHE > Media and Publications > Legislation > White Paper for Post-School Education and Training



January, 2014

Department of Higher Education and Training

[White Paper for Post-School Education and Training](http://www.che.ac.za/media_and_publications/legislation/white-paper-post-school-education-and-training)

http://www.che.ac.za/media_and_publications/legislation/white-paper-post-school-education-and-training (p. 54).



by Paul Richardson 9 April 2014

The ‘open education’ discussion in the UK has been quite busy over the last few weeks.

Following the publication of the first draft of the [Scottish Open Education Declaration](#) in March, last week saw the publication of the Welsh Government’s report [Open and Online](#), which represents another landmark in the development of policy on open education. The report is the work of the [Online Digital Learning Working Group](#), made up of senior and influential people from Welsh higher education and chaired by Andrew Green, now retired but formerly National Librarian of Wales, who has posted [some reflections of his own](#).

The working group, on which I acted as a professional adviser, was appointed to investigate the implications of recent and current developments in online education, particularly MOOCs and OERs. It was also asked to advise on policies which might exploit the

<http://www.jisc.ac.uk/blog/open-and-online-wales-higher-education-and-emerging-modes-of-learning-09-apr-2014>



The Scottish Open Education Declaration

<http://declaration.openscot.net/>

One of the primary deliverables we agreed to produce following the [Open Scottish Summit](#) held in Edinburgh last year, was a declaration supporting open education in Scotland based on the UNESCO [Paris OER Declaration](#). There was general agreement that the Paris Declaration was a ‘good thing’ however many participants felt it was too focused on OER and that a Scottish declaration should encompass open education more widely. The result is the [Scottish Open Education Declaration](#), a draft statement adapted from the Paris OER Declaration.

OPEN SCOTLAND
Promoting the development and adoption of open education policies and practices in Scotland. [Open Scot](#)

Home
About
Declaration
Events

In order to coincide with [Open Education Wales](#), the first draft of the [Scottish Open Education Declaration](#) has been shared online using the CommonPress application to enable all members of the community to add comments and feedback. We invite all those with an interest in open education in Scotland to comment on and contribute to this draft and to encourage their colleagues to join the debate.

<http://declaration.openscot.net/>

In addition to adapting the Paris OER Declaration, colleagues at the Open Scottish Summit also suggested that it would be beneficial to develop a grid of the Declaration’s statements, which stakeholders could fill in to provide contextualisation and evidence of the statements in action. This will be the next

<http://openscot.wordpress.com/>

Province offers money for open textbooks

Alberta government says initiative passed due to student lobbying

Publication Year	Issue Date	Filter by issue
2014	---	Filter by issue

by: Riley Hill, news editor

A new government initiative might soon bring free online textbooks to the province’s campuses.

On April 9, the Alberta government announced the Open Educational Resources Initiative. The \$2 million program will bring together faculty, students and academic staff from across the province to find a way to include open textbooks in undergraduate courses.

<http://www.thegauntlet.ca/story/province-offers-money-open-textbooks>

The screenshot shows the Welsh Government website with a search bar and navigation menu. The main content area displays the title 'Report of the online digital learning group' and a sub-section 'Recommendations to help improve online digital learning in higher and further education'. It mentions that in February 2013, Leighton Andrews AM, then Minister for Education and Skills established the Online Digital Learning Working Group. The group drew on expertise from further and higher education in Wales to report on the challenges to higher education in Wales of emerging trends in online learning. A 'Document Download' section is also visible at the bottom.

<http://wales.gov.uk/topics/educationandskills/publications/reports/report-of-the-online-digital-learning-group/?skip=1&lang=en>

Why Focus on Impact of International Organizations (IOs) on Governmental OER Policies?

IOs = organizations with international membership, scope, mandate and activities. IOs can be divided into Intergovernmental organizations (IGOs) – sovereign states and International nongovernmental organizations (INGOs)

- IOs increasingly seen as policy actors as opposed to just policy advisors or mediators (Henry et al., 2001)
- National policymaking is still largely mediated by national politics and traditions

However

- It is increasingly linked to globalized policy discourses, pressures from Inter-governmental Organizations (IGOs) and/or global policy networks (INGOs, etc.) (Rizvi and Lingard, 2010)

Why focus on International Organizations (IOs)

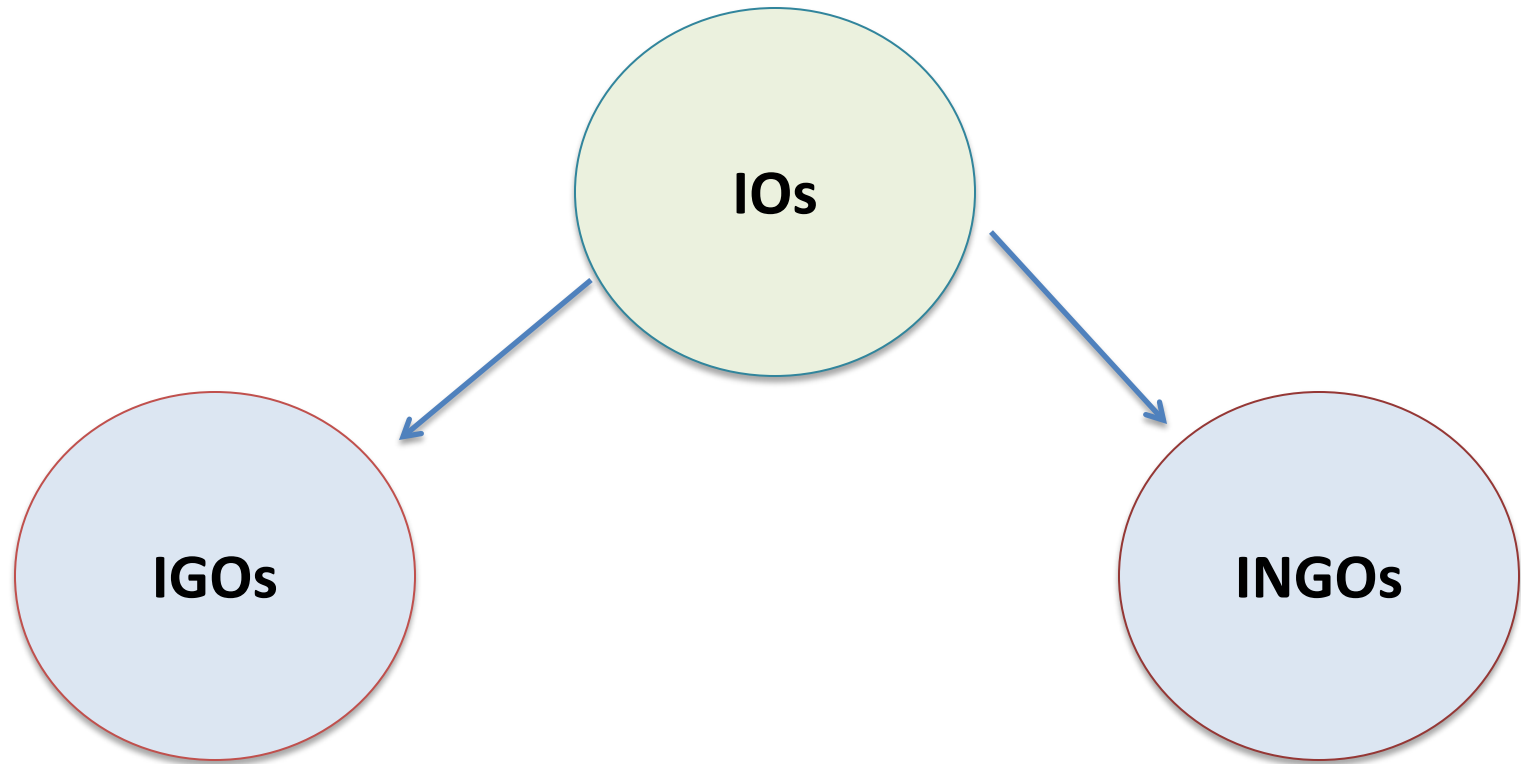
- While there appears to be consensus about the influence of IOs on national policy making little is known about whether and how these IO's influences translate into concrete national policies or how they affect national policy making in general.

(Shahjahan, 2012; Christensen, 2006)

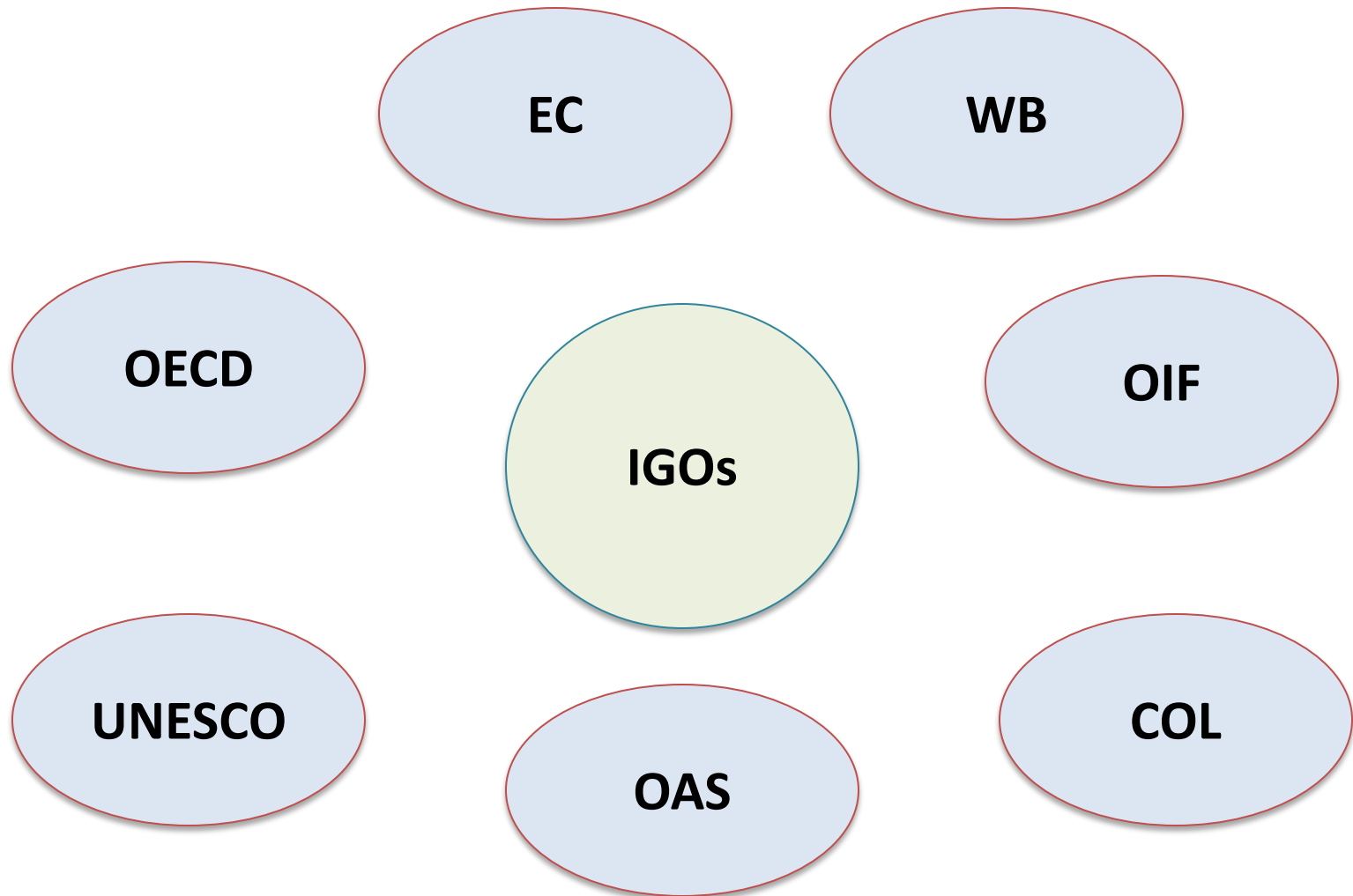
Research Questions

- What key OER policy instruments can be identified with different IOs?
- What impact have these key IO OER policy instruments on Governmental OER policies?
- What recommendations, if implemented, would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies?

Which IOs?



Which IGOs?



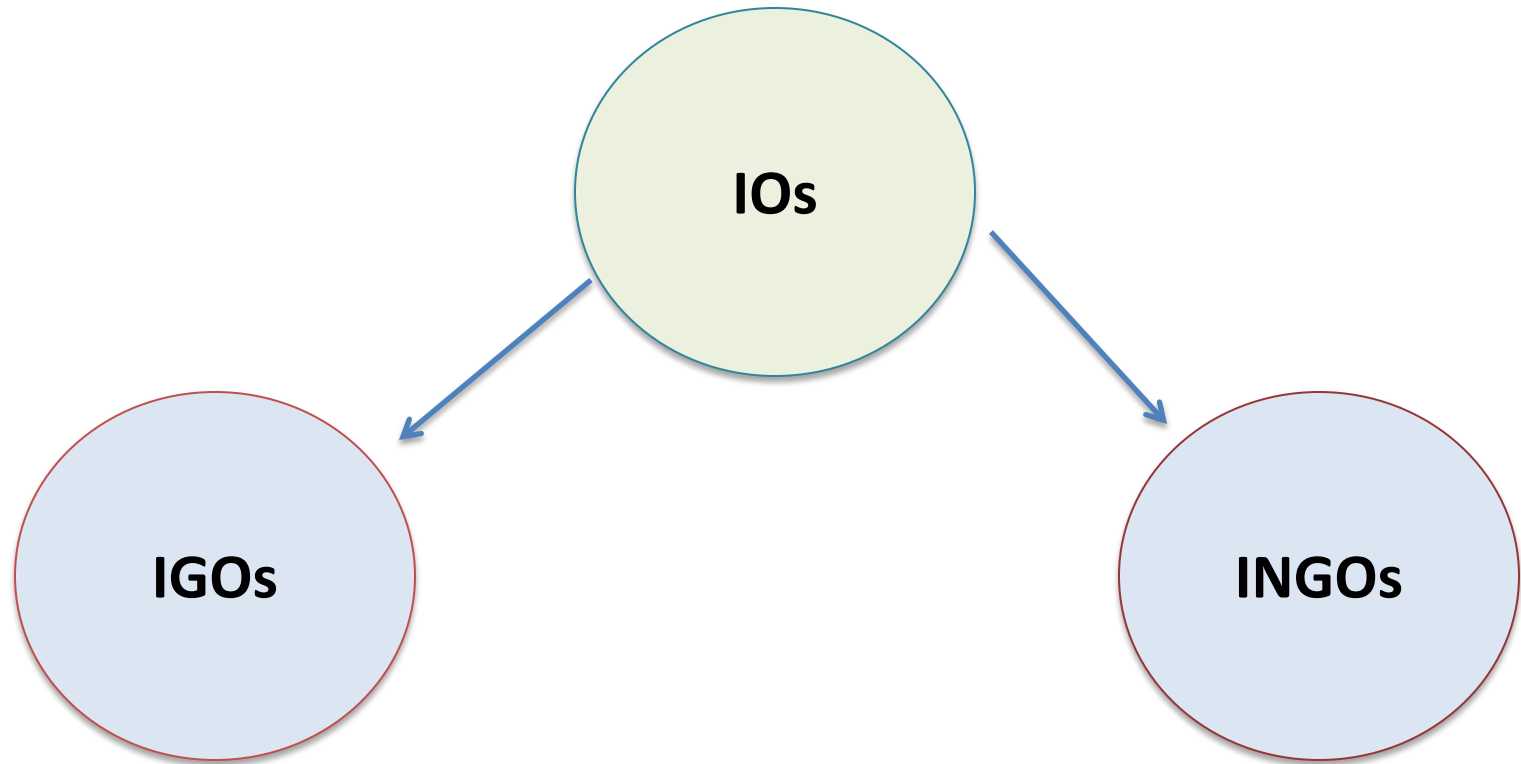
IGOs: Instruments to Influence educational policy processes at global & national levels

- Producing policy reports
- Providing financial support through loans and funding initiatives
- Data collection and analysis
- Offering policy advice
- Sponsoring or organizing international/regional conferences and networks
- Providing analytical assistance
- Issuing non-binding and binding guidelines or declarations
- Carrying out country and thematic reviews (Balzer and Martenas 2004; Shuller and Vincent-Lancrin, 2009)

IGOs: Some notable OER Policy Instruments

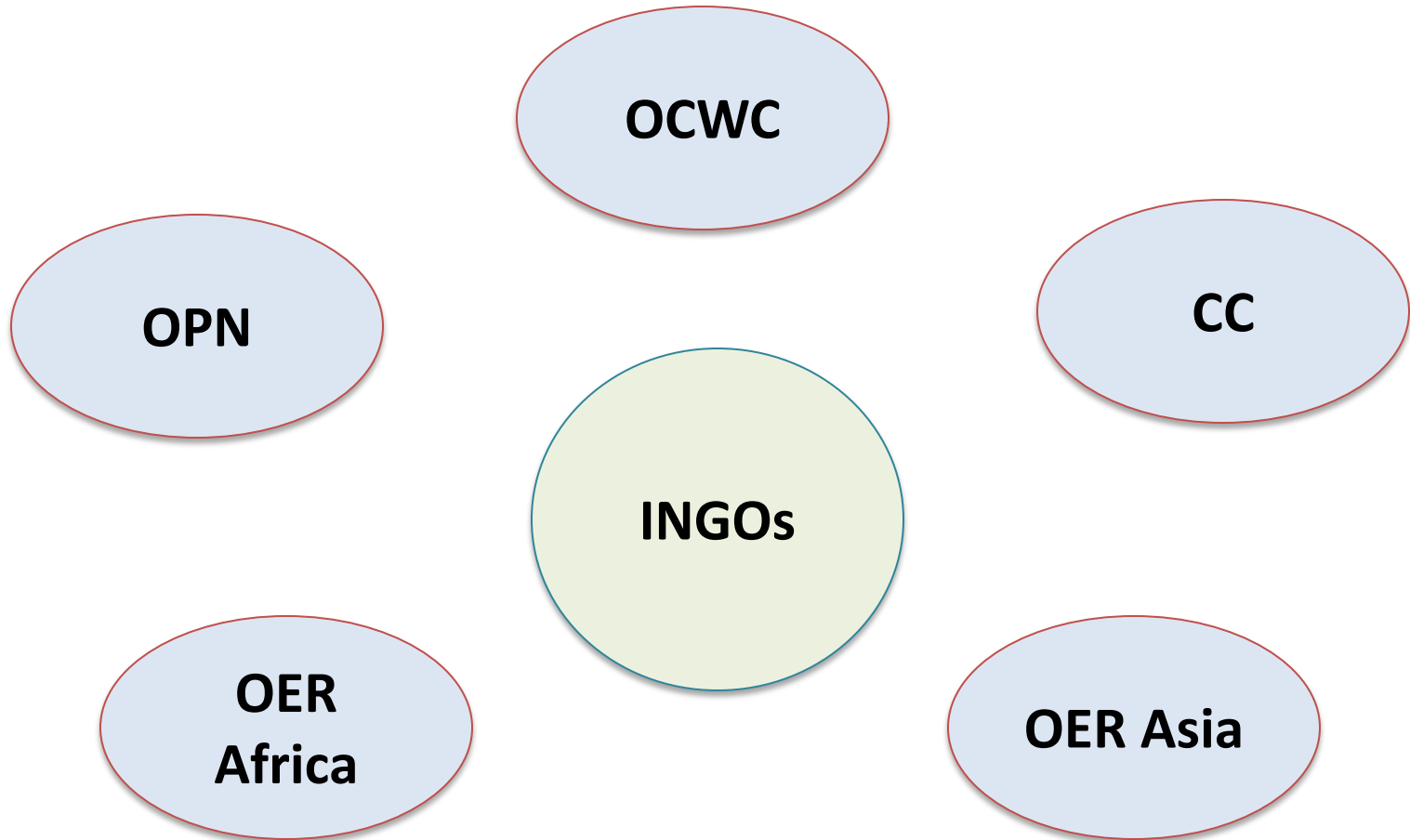
- UNESCO: Paris OER Declaration
- OECD: Policy Recommendations
- UNESCO/COL: OER handbooks and policy template
- EC: Opening up education

Which IOs?



Which INGOs?

Selection criteria: Currently influencing global/national educational policy landscape or potential to do so in the future



INGOs: Policy Instruments

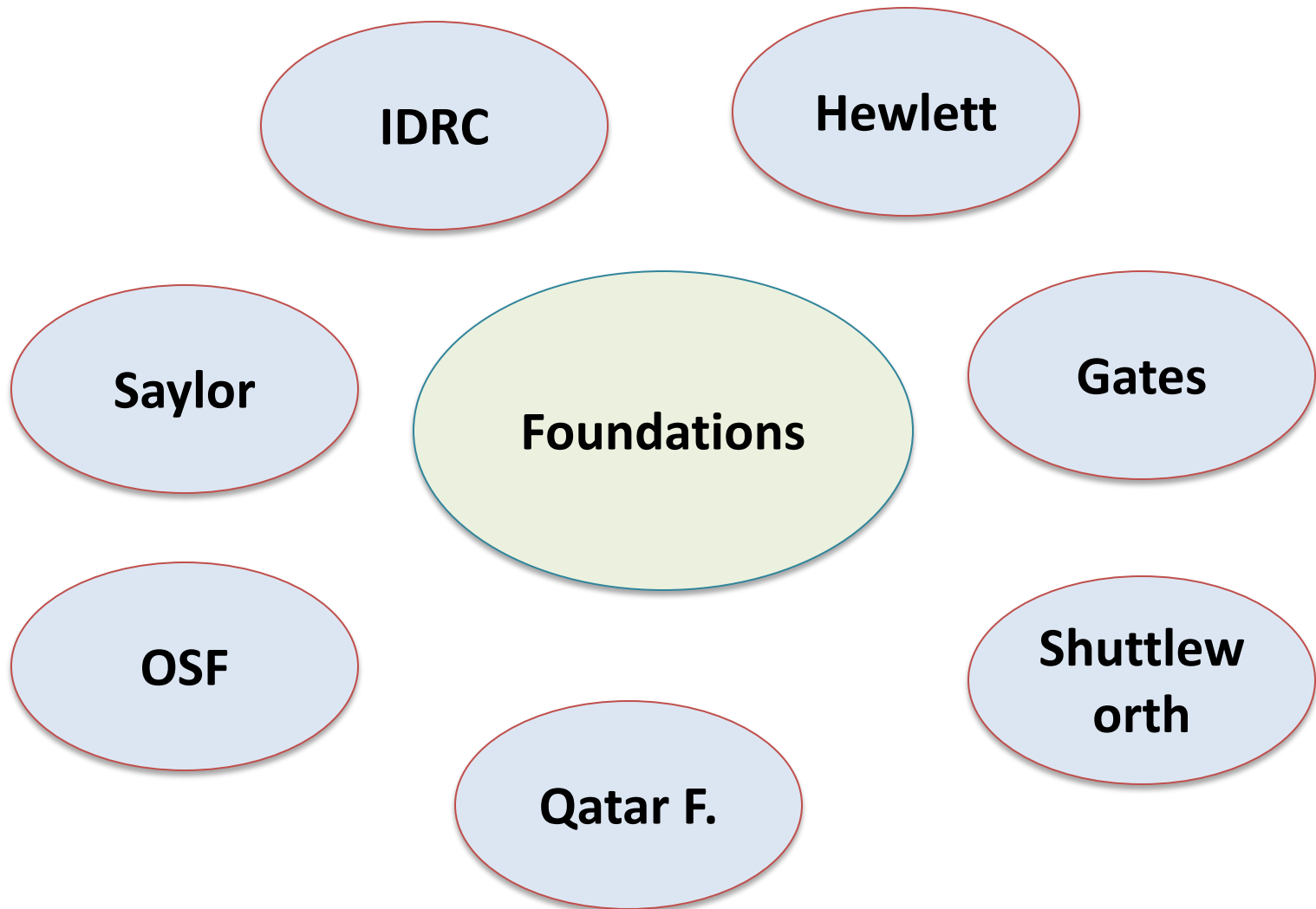
- Producing policy reports
- Providing policy advice
- Data collection and analysis
- Carrying out country and thematic reviews
- Advocacy (national and global levels)
- Organizing international conferences and networks
- Actively promoting and encouraging OER practices at HEIs

Foundations

Included because:

- Early catalytic players in the field (providing seed funding for OER projects)
- Small amount of funding = national initiatives in some cases
- While government funding and policy is more important, it is necessary to document such processes/impact of foundations (part of policy process)

Which Foundations?



Foundations: Policy Instruments

- Providing seed funding for new initiatives
- Organizing and sponsoring meetings with various stakeholders
- Providing funding for research initiatives in order to increase impact evidence base (part of policy process)

Which Governments are included in the study?

Level of analysis (jurisdictions): provincial/state, national

Kenya	Nigeria
Senegal	South Africa
Brazil	Canada (2 provinces)
Colombia	Chile
Mexico	USA (California/Washington)
China	India
Indonesia	Mongolia
Oman	Turkey
France	Netherlands
Poland	Russia
Slovenia	UK (England, Scotland, Wales)
Australia	New Zealand

Research Methodology Step I (IOs)

Case studies approach

Steps (IOs)	Timelines
Identification of main representatives from IOs for the interviews	May 2014 – July 2014
Desktop research: identification of the key OER policy instruments at IO level for influencing OER policy developments or changes (to be validated and specified during interviews)	May 2014 – September 2014
Developing interview protocol	October 2014 – December 2014
Interviews with IO representatives (validating and specifying key OER policy instruments and exploring intended & observed impact)	January 2015 – June 2015
Interviews: analysis and write up and validation of interview results with interviewees from IOs	July 2015 – December 2015
Publication of results (articles, book chapters)	TBA

Research Methodology Step II (Foundations)

Case studies approach

Steps (Foundations)	Timelines
Identification of main representatives from Foundations for the interviews	May 2014 – July 2014
Desktop research: identification of the key OER policy instruments for influencing OER policy developments or changes (to be validated and specified during interviews)	May 2014 – September 2014
Developing interview protocol	October 2014 – December 2014
Interviews with representatives of foundations (validating and specifying key OER policy instruments and exploring intended & observed impact)	January 2015 – April 2015
Interviews: analysis and write up and validation of interview results with interviewees from Foundations	May 2015 – July 2015
Publication of results (articles, book chapters)	TBA

Research Methodology Step III (Governments)

Steps (Governments)	Timelines
Identification of CCPGs	May 2014 – July 2014
Desktop research: main OER policy developments that have taken place in specific countries (in consultation with CCPGs)	August 2014 – December 2014
Identification of government representatives for interviews (in consultation with CCPGs)	August 2014 – December 2014
Developing interview protocol	January 2015 – March 2015
Training of CCPGs responsible for conducting interviews in some of the countries included in the study	April 2015 – June 2015
Interviews with government representatives	July 2015 – June 2015
Interview analysis and write up	August 2016 – February 2017
Validation of results (Delphi Technique)	October 2016 – May 2017
Publication of results	TBA

Research Methodology Step III (Governments)

Case studies approach

Country Contact Points for Governments (CCPGs) involvement is crucial for the following reasons:

- To help identify any relevant national OER policy developments in specific countries including relevant policy documents. This step will be conducted prior to interviews with government representatives.
- To help identify and approach the appropriate government representatives to be interviewed.
- In some cases to conduct the interviews with the government representatives on behalf of the PhD researcher and under his primary responsibility for preparing the interview instruments. This is due to limitations in time and capacity of the PhD researcher (with such an ambitious long list of governments) and to financial constraints (travel, etc) or language demands in specific countries.

Research Methodology Step IV (Recommendations)

Steps (Recommendations)	Timelines
Developing Recommendations based on outcomes from Steps 1-3	June 2017 – October 2017

Research Questions

- What key OER policy instruments can be identified with different IOs?
- What impact have these key IO OER policy instruments on Governmental OER policies?
- What recommendations, if implemented, would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies?

Research Methodology (Overall Summary)

- Protocolled interviews with representatives from IOs will serve to identify the key OER policy instruments at IOs level and to explore the intended and observed impact of such instruments on national OER policy making (answering research question 1).
- Protocolled interviews with government representatives will serve to analyze the (perceived) impact of the key IO OER policy instruments on governmental OER policies (answering research question 2).
- Based on the findings from research questions 1 and 2 the study will provide recommendations that would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies (answering research question 3).

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