

NATIONAL, PROVINCIAL AND INSTITUTIONAL POLICY INFLUENCE ON THE ADOPTION OF OER IN THE GLOBAL SOUTH

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National, Provincial and Institutional Policy Influence on the Adoption of OER in the Global South

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www.slideshare.net/ROER4D/



IDRC



CRDI



ROER4D project

Research on Open Educational Resources for Development in the Global South

August 2013 - December 2017

GENERAL OBJECTIVE:

IMPROVE EDUCATIONAL POLICY, PRACTICE and RESEARCH in developing countries by better understanding the use and impact of OER

PROJECT CLUSTERS

- OER Desktop Review
- OER Survey
- Academics' adoption of OER
- Teacher educators' adoption of OER
- OER adoption in one country
- OER impact studies
- Baseline educational expenditure



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wawasan
open UNIVERSITY
the people's university

IDRC
International Development
Research Centre

CRDI
Centre de recherches pour le
développement international

UKaid

created by Rondine Carstens and the ROER4D team



National: setting default parameters on copyright

OER use

Most countries in our study:

- are signatories to the Berne Convention
- accept Creative Commons licensing, which allows copyright-holders to modify certain elements of their copyright status
- allow exemptions to copyright protection for educational use (including “fair use/dealing”)

= no major legal or policy obstacles for educators to use OER

OER creation

Most, but not all, countries grant default copyright of employees’ work product to employers, including educators’ teaching materials

= major legal obstacle for educators to create OER, but an opportunity for employers to share the educational materials of their educators as OER

Provincial (or state): typically for public schools

OER use

Teachers are typically allowed to incorporate OER, though not incentivized formally; however, the bulk of their materials may be sourced through a centralized procurement process between the province/state and traditional publishers (thus minimizing the role that OER can play)

= no major policy obstacles for educators to use OER

OER creation

Most provincial/state education authorities do not have OER strategies or policies, but they hold copyright of their teachers' educational materials as employers

= major policy obstacle for teachers to create OER; the lack of an OER strategy or policy by most provincial/state employers also means that they are unlikely to share their educators' materials as OER soon

Institutional: for private schools & most HEIs

OER use

Educators are typically allowed to incorporate OER, though not incentivized formally

= no major policy obstacles to OER use

OER creation

Most institutions do not have OER strategies or policies, but their IP policies typically reinforce national copyright legislation regarding their possession of copyright over their teachers' educational materials

= major policy obstacle for educators to create OER; the lack of an OER strategy or policy by most institutions means that they are unlikely to share their educators' materials as OER soon

The OER-related policy landscape: in brief

OER use

- No policy barriers to educators using OER

OER creation

- Educators typically do not have permission to share their materials as OER: National copyright legislation grants copyright over educators' work product to employers
- Provincial (state) and institutional employers typically do not have strategies or policies for sharing their IP as OER
- To overcome this, either the employers need to become agents of OER sharing, or they should formally permit their educators to share their materials as OER

Spotlight on OER policy in the Global South



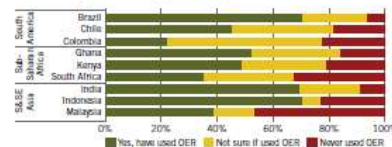
Case studies from the Research on Open Educational Resources for Development (ROER4D) project

September 2017
<http://roer4d.org>

To understand how policies enable or constrain educators' adoption of Open Educational Resources (OER) in South America, Sub-Saharan Africa and South and Southeast Asia, the Research on Open Educational Resources for Development (ROER4D) project undertook a meta-synthesis of seven ROER4D studies conducted in four countries – Colombia, South Africa, Afghanistan and Mongolia – to illustrate the varied influence that policy has on OER adoption in these diverse national contexts. By "policy", we refer not only to OER-specific policies, but to relevant international treaties and declarations that enable or constrain national copyright and "fair use" legislation and strategies, as well as institutional intellectual property (IP) regulations and Open Access policies.

Baseline figures for OER adoption in the Global South

To help put the country case studies into context, it is important to have a broader sense of OER activity in the Global South. The ROER4D cross-regional study by de Oliveira Neto, Pele, Davyono and Cartmill¹ provides data in this regard. This study was based on a survey of 295 randomly selected educators at 28 higher education institutions (HEIs) in nine countries across the three ROER4D regions. Just over half (51%) of the educators surveyed stated that they had used OER at least once, one-quarter (25%) had never used OER, and almost another quarter (24%) were not sure whether they had used OER. This suggests that, while a small majority have used OER and have some familiarity with it, a sizeable minority have never done so and/or are not aware of the concept. This lack of a clear understanding of what defines OER emerges as a key challenge for advocating and researching OER activity.



As the figure illustrates, the level of OER use appears to be slightly differentiated by region: 50% in South America, 46% in Sub-Saharan Africa, and 56% in South and Southeast Asia. The percentage of OER users (51%) was more than twice as high as the percentage of OER creators (23%). This is not surprising, given the relatively low barriers to OER use compared to OER creation. The study found no association between respondents' perceptions of their institutions' OER-related policies (or lack thereof) and their levels of OER use or creation. While policy may be an influencing factor in OER (in)activity, the study revealed no consistent pattern in this regard.

ROER4D focuses on understanding the use, creation and impact of OER across three regions in the Global South – South America, Sub-Saharan Africa, and South and Southeast Asia – over the period 2014–2017. The project consists of 18 sub-projects with more than 100 participating researchers and research associates in Afghanistan, Brazil, Chile, Colombia, Ghana, India, Indonesia, Kenya, Malaysia, Mauritius, Mongolia, Pakistan, the Philippines, Somalia, South Africa, Sri Lanka, Tanzania, Uganda, Uruguay, Zambia and Zimbabwe.

<http://goo.gl/2BjQtL>

Questions to help determine OER policy landscape

National

OER USERS	OER CREATORS
<p><i>Legal</i></p> <ul style="list-style-type: none"> Does national copyright legislation provide exemptions for educators to use copyrighted materials for educational purposes (including “fair use” or “fair dealing” exceptions)? 	<p><i>Legal</i></p> <ul style="list-style-type: none"> Does national copyright legislation stipulate that creators (e.g. educators) of works keep copyright of their creations, or does copyright belong to the employer (e.g. govt, institution)?
<p><i>Organisational</i></p> <ul style="list-style-type: none"> Is there a government-supported repository or portal of educational materials for schools and/or HEIs? Are there nationally available OER repositories hosted by NGOs? 	<p><i>Organisational</i></p> <ul style="list-style-type: none"> Does the country have national Free and Open Source Software, Open Access or OER strategies or policies? Does the country have a national repository or portal for sharing OER for schools or HEIs?

Provincial

OER USERS	OER CREATORS
<p><i>Legal</i></p> <ul style="list-style-type: none"> Does the provincial education authority provide legal advice on interpreting use of open licensing mechanisms? 	<p><i>Legal</i></p> <ul style="list-style-type: none"> Does the provincial education authority hold copyright over teaching materials created by educators, or is copyright of these materials granted to the educator? Does the provincial educational authority provide legal advice on choosing open licensing mechanisms?
<p><i>Organisational</i></p> <ul style="list-style-type: none"> Do educators require permission from the provincial education authority to use OER in their own teaching and learning materials? 	<p><i>Organisational</i></p> <ul style="list-style-type: none"> Has the province signed the Cape Town Open Education Declaration? Does the provincial education authority have an OER policy or strategy? Does the province have an IP policy, Open Access policy or a strategic plan that includes provisions regarding OER? Does the province have a repository where OER can be hosted?
	<p><i>Financial</i></p> <ul style="list-style-type: none"> Does the province provide direct funding or channel donor funds for OER creation?

Institutional

OER USERS	OER CREATORS
<p><i>Legal</i></p> <ul style="list-style-type: none"> Does the institution provide legal advice on interpreting use of open licensing mechanisms? 	<p><i>Legal</i></p> <ul style="list-style-type: none"> Does the institution hold copyright over teaching materials created by educators, or is copyright of these materials granted to the educator? Does the institution provide legal advice on choosing open licensing mechanisms?
<p><i>Organisational</i></p> <ul style="list-style-type: none"> Do educators require permission from the institution (e.g. curriculum committees) to use OER in their own teaching and learning materials? 	<p><i>Organisational</i></p> <ul style="list-style-type: none"> Has the institution signed the Cape Town Open Education Declaration? Does the institution have an OER policy or strategy? Does the institution have an IP policy, Open Access policy or a strategic plan that includes provisions regarding OER? Does the institution have a repository where OER can be hosted?
	<p><i>Financial</i></p> <ul style="list-style-type: none"> Does the institution provide direct funding or channel donor funds for OER creation?

Citation and attribution

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