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

Trotter, H.; Hodgkinson-Williams, C.;

© 2018, TROTTER, H.

This work is licensed under the Creative Commons Attribution License (https://creativecommons.org/licenses/by/4.0/legalcode), which permits unrestricted use, distribution, and reproduction, provided the original work is properly credited.

Cette œuvre est mise à disposition selon les termes de la licence Creative Commons Attribution (https://creativecommons.org/licenses/by/4.0/legalcode), qui permet l’utilisation, la distribution et la reproduction sans restriction, pourvu que le mérite de la création originale soit adéquatement reconnu.

IDRC Grant/ Subvention du CRDI: 107311-001-Research into Open Educational Resources for Development
National, Provincial and Institutional Policy Influence on the Adoption of OER in the Global South

Henry Trotter & Cheryl Hodgkinson-Williams
ICDE2017 / 17 October 2017 / Toronto, Canada

www.slideshare.net/ROER4D/
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

roer4d.org
facebook.com/ResearchOERforDevelopment
twitter.com/roer4d

created by Rondine Cantens 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

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 17 countries: Colombia, South Africa, Afghanistan and Mongolia. The study finds that while OER adoption in those diverse national contexts by “policy”, we refer not only to OER-specific policies, but to relevant international treaties and conventions that relate to copyright national and “farr” 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 fill the country case studies’ information, it is important to have a broader sense of OER activity in the Global South. This ROER4D cross-national study by Dr. Gabriel Pinto, Peta, IYIYI and Case studies’ provides data in this regard. The study was based on a survey of 241 potentially eligible educators at 58 higher education institutions (HEIs) in nine countries across the three ROER4D regions. Over 18% 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. It suggests that, across a small majority, these views hold and have some consistency, while a sizable minority have never done so and are not aware of the concept. This lack of a clear understanding of what OER means as a key challenge for advocating and mainstreaming this activity.

---

[http://goo.gl/2BjQtL](http://goo.gl/2BjQtL)
<table>
<thead>
<tr>
<th>Questions to help determine OER policy landscape</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OER USERS</strong></td>
</tr>
<tr>
<td><strong>Legal</strong> • Does national copyright legislation provide exemptions for educators to use copyrighted materials for educational purposes (including “fair use” or “fair dealing” exceptions)?</td>
</tr>
<tr>
<td><strong>Organisational</strong> • Is there a government-supported repository or portal of educational materials for schools and/or HEIs?</td>
</tr>
<tr>
<td><strong>OER USERS</strong></td>
</tr>
<tr>
<td><strong>Legal</strong> • Does the provincial education authority provide legal advice on interpreting use of open licensing mechanisms?</td>
</tr>
<tr>
<td><strong>Organisational</strong> • Do educators require permission from the provincial education authority to use OER in their own teaching and learning materials?</td>
</tr>
<tr>
<td><strong>Financial</strong> • Does the province provide direct funding or channel donor funds for OER creation?</td>
</tr>
<tr>
<td><strong>Organisational</strong> • Is there a government-supported repository or portal of educational materials for schools and/or HEIs?</td>
</tr>
<tr>
<td><strong>OER USERS</strong></td>
</tr>
<tr>
<td><strong>Legal</strong> • Does the institution provide legal advice on interpreting use of open licensing mechanisms?</td>
</tr>
<tr>
<td><strong>Organisational</strong> • Do educators require permission from the institution (e.g. curriculum committees) to use OER in their own teaching and learning materials?</td>
</tr>
<tr>
<td><strong>Financial</strong> • Does the institution provide direct funding or channel donor funds for OER creation?</td>
</tr>
</tbody>
</table>
Citation and attribution


Contact
cheryl.hodgkinson-williams@uct.ac.za