

# THE SOUTH JOINS A GLOBAL CONVERSATION ON OPEN EDUCATION

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## GLOBAL

# The South joins a global conversation on open education

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A 21-country study aimed at understanding how open educational resources can improve access, enhance quality and reduce education costs in the Global South not only fills a major gap in empirical research, but has helped to grow a community of researchers in the region and given educators in the South a space to voice their own perspectives and participate in a global conversation.

A 21-country study aimed at understanding how open educational resources (OER) can improve access, enhance quality and reduce education costs in the Global South not only fills a major gap in empirical research, but has helped to grow a community of researchers in the region and given educators in the South a space to voice their own perspectives and participate in a global conversation.

According to Cheryl Hodgkinson-Williams, principal investigator and director of the Research on Open Educational Resources for Development (ROER4D) project which conducted the research, the project builds on previous OER research in the Global South but represents a “world first” in terms of its scale and reach.

“This was a first stab at exploring open educational resources use and impact from a Global South perspective,” she told *University World News*. “We have been able to generate an empirical baseline upon which further OER research and advocacy can be built.”

The four-year project, out of which a 16-chapter edited [volume](#) has been produced, entitled *Adoption and Impact of OER in the Global South* and published as an open access publication by African Minds, the International Development Research Centre (IDRC) and ROER4D, had the development of greater research capacity as a key objective.

### Dearth of research

“Five years ago there was a real dearth of research on [OER in] the Global South, and by Global South researchers. There were many researchers from the Global North doing research in the Global South, and very few real collaborations,” said Hodgkinson-Williams. “Thus, the transfer of expertise and building of a community of OER researchers is, I believe, one of the most powerful outcomes of the project.”

Funded in the main through a grant by Canada's IDRC and the United Kingdom's Department for International Development to the University of Cape Town in South Africa in 2013, with additional funds from the Open Society Foundations for a project in Latin America, ROER4D brought together a total of 103 researchers across 21 countries and 16 time zones in South America, Sub-Saharan Africa and South and Southeast Asia.

Among the research participants were 701 university lecturers from 15 countries and 4,985 university students from nine countries.

Hodgkinson-Williams said teamwork was essential to the success of the project, which was able to contribute to the personal and professional development of the researchers involved by giving them the opportunity to meet with each other to discuss their work and get together for project-related conferences. It also played an enabling role in the production of written research outputs.

"We supported our colleagues in different ways to generate content in a form that was compelling and would get the Global North to take notice," she said.

"The tendency still exists for research to be concentrated in the North, and we [in the South] have to work hard to be heard and to get our own researchers heard. So it's very valuable what we could do for the researchers in terms of their own personal development," she said.

## **Epistemic stance**

In addition, as the book notes, the project highlighted the way in which the creation and sharing of OER by academics and teachers in the Global South can be a way of asserting an epistemic stance, or a unique perspective of knowledge – a valuable outcome for people from marginalised communities whose histories and knowledge have been suppressed by colonial or hegemonic powers.

In addition to the edited volume, researchers were involved in collective activities such as weekly project announcements, regular newsletters and seminars. At its end, the project had produced an edited volume, 10 journal articles, three book chapters, two monographs, 10 conference papers and 64 blogs.

OER is defined in the book as "teaching, learning, and research resources that reside in the public domain or have been released under an intellectual

property licence that permits their free use and-or re-purposing by others”.

The phrase "open educational resources" was itself coined during a UNESCO meeting in 2002 aimed at optimising information sharing about what was then an "emerging phenomenon". Today, the concept includes several "pedagogic opportunities" such as massive open online courses (or MOOCs) and open access textbooks.

All understandings of OER recognise a need for open licensing: use of a licence that describes the ways in which a particular resource may be legally reused, shared, modified and curated – the most common form of which is Creative Commons.

In the Global South today, the benefits of OER in education are focused to a large degree on whether they can facilitate greater levels of social inclusion in the context of high demand for education, lack of resources and limited capacity among education systems to provide accessible, relevant, high quality, affordable education.

### **Willingness to share**

Hodgkinson-Williams said the study reveals a widespread willingness on the part of academics and teachers to share their teaching materials.

“Across all studies in Africa and South Africa, and particularly in specialist areas in postgraduate courses, we found that lecturers are generally very interested in sharing. They see OER as an effective means to assist students to learn.”

Despite this willingness, barriers do exist. They include: the extra time it might take to develop materials aimed at a larger audience, particularly when it comes to the development of original graphics and illustrations; technical expertise needed to produce online materials, such as video production skills, and the curation of materials; and the costs involved in the purchase of software needed for production – all of which, in the absence of institutional support, require high levels of commitment from the individual educator.

In addition, there may be legal obstacles, specifically around copyright and intellectual property (IP), affecting OER development and use.

According to Hodgkinson-Williams, some of the key findings of the ROER4D project are around national and institutional IP regulations that govern how teachers can and do share materials. A study of three

institutions in South Africa by Glenda Cox and Henry Trotter revealed that, despite being state-funded, all public universities in South Africa have their own IP policies which provide different prescriptions regarding copyright ownership of educators' teaching materials.

For example, the University of Cape Town is among only five of the country's 26 universities that [give individual lecturers copyright over their teaching materials](#), while the rest, including the University of South Africa (UNISA) and the University of Fort Hare, grant copyright of those materials to the institution. While some of these institutions, including UNISA, have a mechanism for lecturers to ask for permission to share materials openly, this is not widely known.

## **Enabling policies**

In its concluding chapter, the volume outlines a set of clear recommendations under the areas of advocacy, policy, practice and further research, all of which aim to ensure “equitable access to OER, active adaptation of OER to suit local contexts, and the creation and sharing of openly licensed teaching and learning resources showcasing local knowledge in relevant languages”.

Among the policy recommendations is the allocation of “time, rewards and recognition for the adaptation and creation of OER”.

According to Hodgkinson-Williams, in most higher education institutions, research work is still rewarded above teaching and materials development.

However, policy developments in some institutions, and increasing awareness on the part of funders, suggest a growing openness towards open access policies and strategies.

“Given the financial interests of most academic publishers and the way in which universities perceive the value of the time lecturers put into their activities, open access practices and products remain contested terrain. Until government and institutions see the value of open access and OER, tensions will still exist within the system which challenges those individuals and systems motivated more strongly by a social justice imperative.”

Hodgkinson-Williams said although advocacy work is seen as important in terms of building agency among individuals producing OER, it was also important to build trust among communities of scholars and academic disciplines which can act as arbiters of OER quality and build greater credibility around OER.

“A disciplinary association comprised of people with standing in their discipline can start to endorse certain materials which may be important to a particular discipline and thereby serve as a quality controller,” she said.

## **Pedagogic opportunities**

Although not a major thread in the ROER4D project, Hodgkinson-Williams said the production of open access textbooks, as a particular form of OER, holds major pedagogic opportunities – as evidenced by the recent publication of an open access book by University of Cape Town medical professor Johan Fagan titled *Open Access Atlas of Otolaryngology, Head and Neck Operative Surgery*, expressly intended to be of use to surgeons practising in developing countries who cannot afford expensive textbooks.

In addition, Hodgkinson-Williams said research coming out of universities in Canada such as Athabasca University, which specialises in online distance education, suggests that there is also value, particularly in terms of relevance, to having students as co-creators of textbooks – an issue which has enormous resonance for the current debates about the relevance of the curricula happening at South African universities.

“In South Africa, where calls for decolonised curricula are being made and where the cost of textbooks often puts them beyond the reach of students, OER represents a logical thread to pursue,” she said.

For Hodgkinson-Williams, it’s also about finding a “Southern voice” and “making it heard”.

“We have the technical foundations and there is a widespread cultural openness to the idea of OER. Funders are also now looking to help by putting conditions around open access publication on their research grants. We’ve got to take the next steps to address legal and technical barriers in order to optimise possibilities around OER,” she said.

The promotion of that message is being taken seriously by the project itself. “When the project ended we had an extra six months’ funding given to us, from January to June, aimed at trying to entrench the work and promote it to policy-makers who can benefit from our insights,” said Hodgkinson-Williams.

She said the book itself is targeted at a wide range of entities, including inter-governmental agencies such as UNESCO, advocates of OER such as Creative Commons and the Commonwealth of Learning, and the World

Bank.

At a national level, Hodgkinson-Williams hopes the book will reach not only national ministers but director-generals, advisers and consultants, vice-chancellors, those in senior teaching and learning positions within institutions and a range of professionals requiring an understanding of IP requirements. "Basically, we are trying to create an imagination for OER," she said.

*Adoption and Impact of OER in the Global South* edited by Cheryl Hodgkinson-Williams and Patricia B Arinto is an open access publication which forms part of the African Minds peer-reviewed, academic books list.

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