

The Draft UNESCO OER Recommendation : Background and Process

Summary

This paper outlines the background to the development of a draft UNESCO Recommendation on Open Educational Resources (OER). It provides an overview to the process undertaken in this regard in the framework of UNESCO's governing bodies, namely the UNESCO Executive Board and UNESCO General Conference between 2016 and 2018; describes the outcomes of the 2nd World OER Congress and the Ljubljana OER Action Plan. Finally, it provides information on the next steps for the draft Recommendation process in 2019.

Background

Over the last 15 years Open Educational Resources (OER) has proven to be an effective tool for transforming education and supporting knowledge creation. Today, with the commitment of the International Community to achieve the 2030 Sustainable Development Goals (SDGs), and notably SDG 4 "Education" which calls for "*ensuring inclusive and equitable quality education and promoting lifelong learning opportunities for all*", it is even more urgent that the full potential of OER be harnessed.

OER are defined as 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.

ICTs are dramatically increasing the transfer of information through global communication systems, leading to an explosion in the generation and collective sharing of knowledge. The participation of non-specialist in previously specialized disciplinary areas is extending the boundaries of scholarship, while dynamic knowledge creation and social computing tools and processes are becoming more widespread and accepted. This opens up opportunities to create and share a wider array of educational resources, thereby accommodating a greater diversity of student needs. Increased online access to OER has further promoted individualized study, which, coupled with social networking and collaborative learning, has created opportunities for pedagogical innovation.

The fundamental problem is that OER, after more than a decade and a half of advocacy work by stakeholders worldwide, still needs to be mainstreamed more integrally into educational policies and practices. There is a need for consolidation and expansion of the efforts in the implementation of; in particular, actions would be most beneficial in particular in developing countries, where education systems face major challenges of access, quality and cost.

The 2015 evaluation of UNESCO and COL's work in OER concluded that both organizations had succeeded in building awareness, capacity and policies to support OER, both at national and institutional levels in the countries targeted by their interventions. It also found that no one strategy for point of entry fit all cases but that the experiences in the target countries suggest the importance of building on relationships, providing consultation that spans multiple levels within ministries or institutions and building local champions who can sustain the work (ORS Evaluation 2015)

This evaluation concluded that: *The ultimate goal is to generate the capacity and local ownership to make OER part of standard practice in local education delivery systems. The movement has not yet developed to that stage. In the short term, there is still an important role for external organizations to play, including providing tangible examples and models of policies, supporting policy implementation, and promoting the development of linguistically- and culturally-relevant OER content¹.*

This issue has been addressed by two parallel process in since 2016: the organization of the 2nd World OER Congress and the consultations in UNESCO's governing bodies (Executive Board and General Conference).

[2nd World OER Congress : Expert Consultations](#)

The 2nd World Open Educational Resources (OER) Congress took place from 18 to 20 September 2017 in Ljubljana, Slovenia. It was organized by UNESCO and the Government of Slovenia/Ministry of Education, Science and Sport, with the generous support of the Government of Slovenia. The objectives of the 2nd World OER Congress were to:

- examine solutions to meet the challenges of mainstreaming OER content and practices into education systems worldwide;
- showcase the world's best practices in OER policies, initiatives and experts, and;
- identify recommendations that are demonstrably best practices for the mainstreaming of OER.

The 2nd World OER Congress brought together Ministers of Education and Higher Education, decision-makers responsible for human resources development, senior policy makers, expert practitioners, researchers and relevant stakeholders. Some 500 participants attended the event from over 100 UNESCO Member States, including 14 Ministers responsible for Education.

The 2nd World OER Congress resulted in the "Ljubljana OER Action Plan"² and the 2ndWorld OER Congress Ministerial Statement³ which were both adopted by consensus.

The Ljubljana OER Action Plan provides recommendations to stakeholders in five strategic areas: building the capacity of users to find, re-use, create and share OER; language and cultural issues; ensuring inclusive and equitable access to quality OER; developing sustainability models; and developing supportive policy environments.

¹ ORS Impact, Evaluation of the William and flora Hewlett Foundation's Investment in international Policy Advocacy for Open Educational Resources, June 2015 (p.15)

² The "Ljubljana OER Action Plan" is accessible at:
https://en.unesco.org/sites/default/files/annex1_ljubljana_oer_action_plan_2017_online.pdf

³ The 2nd World OER Congress Ministerial Statement is accessible at:
https://en.unesco.org/sites/default/files/annex2_woerc_ministers_statement_online.pdf

The Ljubljana OER Action Plan invites multi-stakeholder commitments at local, national and international levels around the five strategic areas. The stakeholders, identified in this Action Plan, and represented at the Congress, are: educators, teacher trainers, librarians, learners, parents, educational policy makers at both the governmental and institutional level, teacher and other professional associations, student associations, teacher and student unions as well as other members of civil society, and intergovernmental organizations and funding bodies. It was developed through:

- Recommendations compiled at six OER regional consultations attended by OER experts and policy makers from more than 100 countries, organized from December 2016 to May 2017 by the Commonwealth of Learning, in cooperation with UNESCO and the Slovenian Government, through the generous support of the William and Flora Hewlett Foundation. These regional consultations were held in: Brazil, Malaysia, Malta, New Zealand and Qatar⁴.
- An open, online consultation on the draft Action Plan held from July to September 2017 incorporating more than 100 additional inputs and feedback from UNESCO Member States and the global OER community.
- Key recommendations from the parallel sessions and debates of the 2nd World OER Congress, compiled by a high-level drafting group Chaired by the president of the Congress, governmental representatives of each region, non-governmental and civil society stakeholder groups, including teacher and student representatives, as well as representatives of the UNESCO Secretariat and the Ministry of Education, Science and Sport of Slovenia.

The 2nd World OER Congress Ministerial Statement⁵ was adopted at the Ministerial Roundtable held during the Congress. This Ministerial Statement underscored a “call on all educational stakeholders to implement the recommendations of the Ljubljana OER Action Plan 2017.”

[UNESCO Governing Body Deliberations](#)

Member States and stakeholders active in the OER community have stated that the existence of a UNESCO standard-setting instrument would be an effective tool to enable a critical mass of countries to integrate OER in their mainstream education development strategies and daily pedagogical practices. This would then ensure the understanding of national and institutional policy makers and practitioners on the irreversible and transformative powers carried by OER in promoting

⁴ The six sessions were held in: Kuala Lumpur, Malaysia (Asia Regional Consultation, 1-2 December 2016); Valletta, Malta (Europe Regional Consultation, 23-24 February 2017); Doha, Qatar (Arab States Regional Consultation, 27-28 February 2017); Port Louis, Mauritius (Africa Regional Consultation, 2-3 March 2017); Sao Paulo, Brazil (Americas Regional Consultation, 3-4 April 2017); and Auckland, New Zealand (Pacific Regional Consultation 29-30 May 2017).

⁵ This Ministerial Statement was endorsed by 20 Ministers and their designated representatives participating in the Congress, namely representatives from: Bangladesh, Barbados, Bulgaria, Czech Republic, Costa Rica, Croatia, Kiribati, Lao People's Democratic Republic, Lithuania, Malta, Mauritius, Mauritania, Mozambique, Palestine, Romania, Serbia, Slovakia, Slovenia, South Africa and the United Arab Emirates.

access, equality, quality in education, but also support strategies endorsed by national stakeholders to drive the sector-wide adoption of OER.

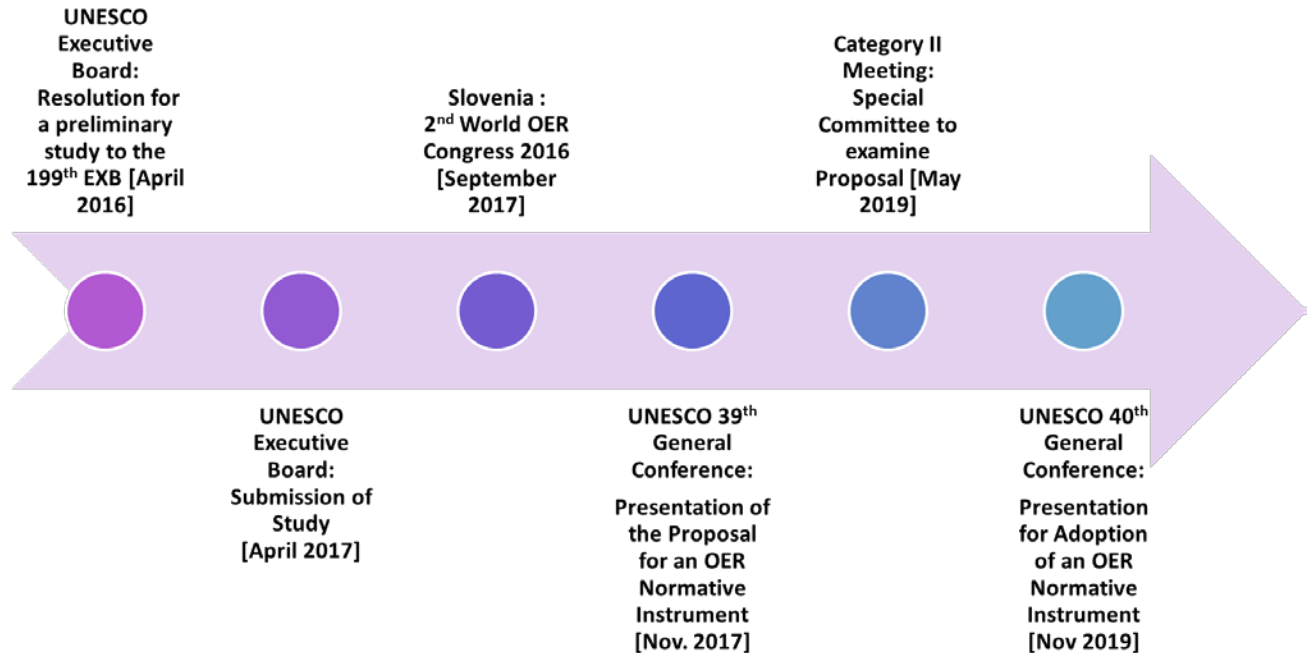


Figure 1. Overview of the consultations concerning the Draft OER Recommendation development process

At the 199th Session of the UNESCO Executive Board, a Resolution, presented by Slovenia, proposing a study on international collaboration on OER, with a view to exploring mechanisms that would mobilize UNESCO’s Member States and provide a regular and systematic international overview of the extent and nature of the impact of OER on educational development was adopted.

This issue was further addressed in the Governing Bodies of UNESCO, at the 201st Session of the UNESCO Executive Board (April 2017) and the 39th Session of the UNESCO General Conference (November 2017), where Member States called on the UNESCO Secretariat to present a draft recommendation on OER to the 40th Session of the UNESCO General Conference in November 2019. At the 205th Session of the Executive Board (October 2018) the Category II meeting of governmental representatives for the draft Recommendation was announced.

At its 201st session, the Executive Board (201 EX/Decision 9), invited the Director-General to submit the preliminary study together with the relevant observations and decisions of the Executive Board, thereon and on how international collaboration on OER can continue to progress taking into account the outcomes of: (a) the OER regional consultations organized by the Commonwealth of Learning ; and (b) the second World OER Congress. It recommended on this basis that the General Conference at its 39th session consider the possibility of a recommendation, taking into account budgetary and resource implications for the Secretariat, to reinforce international collaboration in the field of OER

The observations of the Executive Board during the debates at its 201st session, on item 201 EX/9 highlighted that a standard-setting instrument in the area of OER would be an important means for

facilitating the articulation of effective OER practices and policies. It was underscored that, while the UNESCO Paris OER Declaration 2012, which was produced through an extensive international consultation and adopted at the 1st World OER Congress (UNESCO Headquarters, Paris 2012), represented an internationally recognized strategy for OER, there remains a need to expand and consolidate commitments to actions, strategies and legislation.

By its Decision 39 C/Resolution 44, the General Conference requested the Director-General to submit to it, at its 40th session, a draft text of a recommendation on OER

UNESCO, lead by the Communication and Information Sector, worked with an expert group⁶, steered by the UNESCO OER Chair in Slovenia, to develop the draft Recommendation and preliminary report between January and June 2018. The consultation process included an open consultation, which took place between April and May 2018, similar to the process held for the 2nd World OER Congress.

The contents of the draft OER recommendation and preliminary report take up the main points highlighted in the Ljubljana OER Declaration, namely building the capacity of users to find, re-use, create and share OER; language and cultural issues; ensuring inclusive and equitable access to quality OER; developing sustainability models; and developing supportive policy environments..

On 31 August 2018 a preliminary report of the Director- General, together with the initial draft of the recommendation, was sent for comments to Member States by a circular letter⁷. Member States were requested to provide comments to the UNESCO Secretariat by 4 January 2019 on this document.

In November 2018, UNESCO will be sending out a circular letter inviting Member States to nominate their official representatives to the category II meeting of governmental representatives to be held 27 to 28 May 2019 at UNESCO Headquarters.

Further to the inputs received to the draft sent After which a further revision of the text will be done based on the comments, and sent on 31 August, a revised text will be developed to be discussed at the 27 to 28 May 2019 Category II Meeting.

Following the deliberations of the Category II Meeting on 27 and 28 May 2018, a final draft text will be developed and sent to Member States by 30 July 2019 for consultation at the 40th session of the UNESCO General Conference in November 2019.

⁶ The Expert Group was comprised of OER experts at institutional and governmental level representing all UNESCO regions, and ensuring gender equity. It met at a F2F meeting in March 2018, and electronically in June 2018.

⁷ The text of this circular letter is available at the following link in English:
<http://unesdoc.unesco.org/images/0026/002655/265554e.pdf>

The text of this circular letter is available at the following link in French::
<http://unesdoc.unesco.org/images/0026/002655/265554f.pdf>