Open Educational Resources and Libraries

A Briefing

KEY POINTS

1. **Open educational resources (OERs) are teaching, learning and research materials made available for free, and with no or only limited restrictions, to support access to knowledge.**
2. **OERs are becoming increasingly important in the education sector. They have proven their benefits by providing democratic and equitable access to knowledge, supporting life-long and informal learning, and offering diversified sources of knowledge.**
3. **Librarians are helping to make OERs a reality: they make them available and accessible, and encourage their production, use and dissemination.**

WHAT ARE OPEN EDUCATIONAL RESOURCES?

There are several definitions[1] for Open Educational Resources (OERs), but the main characteristics are the following:

- **Type of resource**: OER can be more or less any type of material. According to the William and Flora Hewlett Foundation, "open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge". According to the OECD "OER includes learning content, software tools to develop, use, and distribute content, and implementation resources such as open licences".

- **Purpose**: The objective of the resources is teaching and learning[2], and may include research[3].

- **Format or medium of use:** any medium, digital[4] or otherwise[5].

- **Copyright status:** the material should 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[6]; or offered freely and openly (…) to use and reuse.

> **UNESCO's definition of OERs:**
>
> *"Open Educational Resources (OER) are 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".*

---

[1] A very good overview of the main definitions, their differences and similarities is available at the Creative Commons Wiki https://wiki.creativecommons.org/wiki/What_is_OER%3F
[2] UNESCO definition.
[3] According to the OECD and the William and Flora Hewlett Foundation definition.
[4] According to the OECD's definition, however, OERs are only digitized materials.
[5] UNESCO definition
[6] UNESCO and William and Flora Hewlett Foundation definition

OER is often linked to **open access** (OA), to **online learning**, and to **open education**:

- **OA** refers to research outputs which are distributed online and free of cost or other (major) barriers, while OER has a focus on educational purposes. However, one could argue that they both share the motivation of making access to knowledge free of barriers.

- OER has a strong link to **online learning**. Although OER does not only come in a digital format, information technologies have been essential to the growth and spread of the movement.

- OER is a key part of **open education**, which relies on these materials to achieve the goal of giving broader access to more effective learning and training opportunities. This applies as much to formal education systems as to informal learning. However, open education is a much broader concept that also looks into other aspects of the learning experience.

ADVANTAGES OF OER

There are several reasons why OER is considered a good alternative, or at least a good complement, to traditional textbooks to support learning:

1. OER can provide democratic and equitable access to knowledge, meaning that anyone can access and use the resources regardless of income level, as long as there are no technical barriers. Given the sometimes high and unaffordable cost of textbooks[7], OER offers a solution for those faced with economic restrictions. Some argue that truly public education should not leave unresolved the problem of the affordability of textbooks, which leaves some students without access to a key part of their learning process.

2. OER can support life-long and non-formal learning, by being available to people outside of the formal educational system, regardless of age and previous studies.

3. OER can offer more diversified knowledge than traditional textbooks. Through OER, materials come from many different sources, different regions, reflect multiple perspectives and are available in many different languages[8].

4. OER can also create a more dynamic experience for the learner, who instead of passively listening or reading, can take part in the creation of the educational resources.

5. The possibility for others to review a work and make corrections or improvements is also a means of increasing the quality and relevance of the materials. Furthermore, when sharing something online, its creators also tend to put a bigger effort in ensuring its quality given that their exposure will be wider.

6. OER generally allows for reuse, enabling others to adapt good ideas for their own contexts. Other educators can find, transform material using local examples and references, and use and share it themselves.

---

[7] According to one of the key findings of the survey conducted by Florida Virtual Campus in 2016 "Freeing the Textbook", "the high cost of textbooks is negatively impacting student access, success and completion". It also found that in that particular context, OER saved students $116.94 on average per course when it replaced conventional learning materials. Another study conducted by SPARC with its member libraries showed that $1 billion in savings had been possible through Open Educational Resources. Other sources show that apart from being expensive, textbooks' prices have been increasing.

[8] Many repositories allow for access to sources from all over the world, for instance the OER Commons, the OER Knowledge Cloud or Merlot.

OER POLICIES

OER is not a centralised movement, although there is some coordination, and there are plenty of different initiatives. The term OER was first adopted at UNESCO's 2002 Forum on the Impact of Open Courseware for Higher Education in Developing Countries. International organisations, as well as regional and national governments, have explored (and in certain occasions encouraged) the creation and use of OER. Several organisations, among which library and research bodies, as well as others like Creative Commons, are engaged in advocacy efforts to influence policies around the world.

At the international level, UNESCO has released many documents and guidelines[9], and is currently looking into the creation of draft recommendations. The OECD has also been active on the matter[10].

In December 2012, European Union Ministers issued recommendations on the validation of non-formal and informal learning. The Culture and Education Committee of the European Parliament has also explored, for instance, the advantages of OER in adult education in the paper "Adult education and open educational resources", and issued recommendations for European decisionmakers.

> **IFLA and OER**
>
> IFLA's policies have briefly referred to OERs in the past. For instance, the IFLA statement on open access underlines that "they [librarians] have helped scholarly publishers to publish open access journals and books, and they have worked with educators to produce open educational resources ensuring the quality of digital content, its reuse and sharing".
>
> The IFLA Trend Report of 2013 presented OERs and the rising importance of non-formal and informal learning as an IFLA trend and noted that "in conjunction with existing trends towards lifelong learning and the promotion of non-formal and informal learning opportunities, the increasing availability of online Open Education resources will continue to have a substantial impact on the information environment".

At the national level, initiatives are also implemented, such as the ones recommended by SPARC in the OER State Policy Playbook with a focus on individual US states. Examples highlighted by the document include the establishment of an OER grant program, or a requirement to mark use of OER in course schedules, amongst others. Nigeria offers another example of initiatives at the national level which seek to strengthen commitment to OER by Higher Education Institutions and all concerned stakeholders in the country, as presented by the Open Educational Resources Policy for Higher Education in Nigeria report.

Changes in policies also need to happen at the institutional level. As pointed out by the UNESCO Basic Guide to Open Educational Resources (OER), four main policy issues to be addressed at the institutional level are: "1. Provision in policy of clarity on IPR and copyright, 2. human resource policy guidelines, 3. ICT policy guidelines, and 4. materials development and quality assurance policy guidelines".

Many organisations advocate for changing existing policies at all levels to make them more OER-friendly. Examples of organisations that are leading advocacy work at the national, regional and international level are the Scholarly Publishing and Academic Resources Coalition (SPARC), Creative Commons (CC) or the Association of Research Libraries (ARL).

---

[9] See for instance the Guidelines for Open Educational Resources (OER) in Higher Education and Open educational resources: policy, costs, transformation.
[10] See for instance Open Educational Resources – A Catalyst for Innovation

CHALLENGES ASSOCIATED WITH OER

OER does not come without specific challenges[11]. Although the idea behind OER is that it should be shared broadly, this may not be so easy for a variety of legal reasons. Using OER will still require understanding of licensing terms, which may stand in the way of particular types of reuse. Producing OER, especially when this involves drawing on existing copyrighted works, such as newspaper articles or pictures also requires knowing what is possible, and then how to apply the right licence and make this clear to developers and to users.

> **OER and SDG4: Quality and lifelong education**
>
> There has been a strong focus on underlying the contribution that OER is making to achieve the sustainable development goals, specially SDG 4 on "quality and lifelong education". At the second World OER Congress, co-organised by UNESCO, the Ljubljana action plan was adopted, focusing on actions to overcome certain challenges to OER and to ensure its contribution to SDG4.

There may also be legal issues for platforms hosting OER, which in some circumstances may be made liable for the actions of uploaders. Finally, users may also need to be aware that use of some OER may involve data collection, and so raise privacy concerns.

Given the issues above, there are issues around the level of legal and copyright literacy of developers, librarians and others. Where this is lacking, there may be mistakes, or confusion as to what is possible.

A separate concern is around the perceived quality of OER. Given that it does not always follow a traditional editorial process, some suggest it meets a lower standard. However, OER can be peer reviewed through open methods and there is a lot of high-quality material available. Nonetheless, there is a need to combat the assumption that OER is of a lower quality than conventional materials and sources.

> **Librarians support OER by:**
> 1. Encouraging their creation and use
> 2. Ensuring their availability, accessibility and visibility
> 3. Curating and ensuring its quality
> 4. Advising on copyright matters
> 5. Training users' ICT skills and encouraging digital literacy

Connected to this is the potential for teachers and other educators creating OER not to receive credit for the time invested. While authoring a traditional textbook may count towards promotion or positive appraisal, this is not necessarily the case for those making and sharing OER.

There are also questions about discoverability. While a lot of OERs exist, they may not easily be found by teachers or learners. Platforms and curation can play a major role in this regard, as well as offering a potential means of addressing concerns around quality, given that they make it easier to assess and identify materials.

Technological barriers can also exist. ICTs are not accessible to everyone, and many lack the skills or confidence to use them. With a large amount of OER material made available online, efforts need to be made both in digital literacy and access to digital technologies. In addition, unaddressed accessibility issues (e.g. not adapting materials to the needs of users with print disabilities) can stand in the way of access to knowledge.

---

[11] Some more detail on challenges in the UNESCO Ljubljana action plan.