



# Review of Policy Level Documents Addressing OER in European HE Institutions

DEV 1.2



# BAEKTEL

Blending academic and entrepreneurial knowledge  
in technology enhanced learning

*Blending **Academic** and **Entrepreneurial** Knowledge  
in Technology Enhanced Learning – BAEKTEL*

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## 1 Introduction

Open educational resources policies are principles that support the use of open content and practices in educational institutions, especially open educational resources (OER), and are adopted mostly by governing bodies. The number of these policies is increasing at national, state/province, and also local levels. The requirement of many OER policies is for the publicly funded resources to be openly licensed. [1]

Based on Creative Commons' definition, OER policies are "legislation, institutional policies, and/or funder mandates that lead to the creation, increased use, and/or support for improving OER." OER are learning resources that exist within the public domain or have been released under an intellectual property license permitting their free use and re-purposing by others. [1]

On 22 June 2012, the UNESCO World OER Congress released the 2012 Paris OER Declaration<sup>A</sup> inviting governments to openly license publicly funded educational resources. The declaration that emphasizes the importance of OER and provides recommendations to governments and institutions worldwide was unanimously approved by UNESCO member states. [1]

Creative Commons hosts an OER policy registry that lists 90 current as well as proposed OER policies from around the globe. All current and proposed OER policies in Europe are listed in Table 1. [2]

Table 1: Creative Commons list of current and proposed OER policies in Europe. [2]

Country	Jurisdiction	Tags	Policy	Date
Spain	National Institution - Primary Institution - Secondary	Education free software share	CeDeC	2012/10/10
Spain	Global National Institution - Primary Institution - Secondary	Educación Lengua Matemáticas	Recursos educativos para enseñanza presencial	2012/10/10
Spain	Global Institution - Primary Institution - Secondary	Guía profesores	Publicación de una guía para la creación de recursos educativos abiertos	2012/10/10

<sup>A</sup> 2012 Paris OER Declaration is included in Appendix 1.

France	Institution - Tertiary		ParisTech Charter of Open Courseware and Licensing Practices	2007/03/21
Hungary	National		Apertus Nonprofit Kft. – Szakmai koncepció	
Lithuania	National		Provisions of the National Education Strategy 2003-2012	2003/10/01
Netherlands	National		Programme Plan: Wikiwijs 2011 – 2013	2011/05/19
Poland	National	government education k12	Cyfrowa szkoła (Digital School)	2012/04/03
Scotland	National	declaration open education	Scottish Open Education Declaration	2014/03/11
United Kingdom	National	open access funding open source	JISC Terms and conditions of funding annex to JISC Grant and Contract Letters for Projects	2011/12/16
United Kingdom	Institution - Tertiary	metadata intellectual property learning objects repository	Operational policies for Leeds Metropolitan University institutional repository	
United Kingdom		university	University of Leeds Open Educational Resources guidance	2012/12/19
United Kingdom	National		Policies and Statements of the Open University	

United Kingdom	National		Introduction to the UK Government Licensing Framework	2011/07/29
Wales	National		The Wales Open Education Declaration of Intent	2013/09/20

The policy created at the University of Leeds is a clear example of how to state policies on OER.<sup>B</sup> The document was endorsed by the Vice Chancellor's Executive Group and the Taught Student Education Board (as TSEB/12-15) in November 2012. It demonstrates the University's guidance and point of view regarding the publication and use of OER within educational situations at the University. [3]

## 2 Policy Concerns

There are a range of policies that can either enable or impede the work of OER projects. Thus, it is essential for the governments and institutions to evaluate and develop policies that foster openness and access. Adopted policies should enable or encourage creation, sharing and provision within educational resources. [4]

The policy issues that OER raise are connected with general organisational, cultural and pedagogical matters within individual institutions. Generally, it is agreed that OER are not a technical innovation, but an institutional one. Nonetheless, in order to effectively deal with opportunities as well as threats posed by the OER movement, institutions must still have a well-reasoned ICT (information and communications technologies) strategy and clear e-learning policies. In order to encourage a culture of content sharing and re-using within the institution, many additional institutional innovations will be needed. [4] The areas that should be addressed are the following:

- Curriculum development,
- Financial support,
- Intellectual property,
- Culture of sharing,
- Assessment and accreditation,
- Quality assurance,
- Staff development,
- Student support,
- Technical infrastructure/software,
- Institutional model. [4]

<sup>B</sup> The University of Leeds Open Educational Resources guidance is included in Appendix 2.

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## 3 European OER Policy Project

A project that brings together a union of international experts in order to strengthen the application of open education policies across Europe is the "Open Educational Resources Policy in Europe". Its aim is to take advantage of the current European high profile of open education, established by developments such as the explicit mention of OER as an important policy goal in the EU's new educational strategy "Opening up Education." [5]

### 3.1 Project Goals

One of the aims of the project is to establish Creative Commons and its European affiliates as key stakeholders in a policy debate on open education in Europe. The goal is to ensure that the educational policy, in view of resources and their use, incorporates open principles based on best practices and high standards developed by the community. This can be accomplished by licensing all educational content (both textbooks and other educational resources) produced in Europe with public funding (both at European level and in member states) under a free license. [5]

The objective of the project is to raise awareness of the OER model as well as to demonstrate its advantages to governments, businesses and users in order to support the adoption of OER policies in Europe and EU states. The project also includes issues related to higher education. The initial stage of the project is based on the following three key movements:

1. Building a COMMUNITY of activists by bringing together all those involved in OER actions;
2. Creating CONTENT with a policy position and supporting analysis, in addition to outreach and educational resources, specifically a handbook explaining the operation and benefits of open education;
3. Establishing CONTACT with policymakers and other key stakeholders by organizing a series of targeted meetings and workshops. [5]

The target audience of the project includes the following policymakers and decision making bodies: the European Commission, organizations working on OER policy and adoption in European states, opinion leaders in the field of education and international organizations influencing European OER policy. [5]

### 3.2 Project Plans

As part of the project, a range of policy contents will be prepared, starting with a policy brief that defines the position on OER policy for Europe, complemented with a range of analyses, including one on current textbook production models in European states (into which OERs need to fit) or educational exceptions and limitations. The project will end with a publication of an exhaustive handbook on open education and policies needed to implement it in Europe. [5]

## 4 State of OER Policy in Romania

As most universities that are involved in BAEKTEL project come from the Balkans, it would be interesting to look at a post about OER Policy developments in Europe, specifically about the state of OER Policy in Romania, written by Valentina Pavel from the Association for Technology and Internet (ApTI), retrieved from the Creative Common's website [6]:

*To start the discussion about OER in Romania, we actually have to talk about copyright. People in general have little knowledge about copyright and licences...not to mention OER. Therefore, in Romania we need to focus on information and awareness campaigns targeted at decision-makers, educators, parents as well as pupils and students. At the same time, there is a sense of shyness and reluctance when it comes to approaching this new subject and people hardly stop to grasp and internalize its advantages. Consequently, OER is not yet perceived as a new business model and is considered as a threat to the publishers' market.*

### **OER without even realizing it**

*didactic.ro is what I would have liked to refer to as a good practice example. The website (available in Romanian) is an online teacher's community and the biggest Romanian portal with educational resources for all K12 classes, including technical and vocational education. There are nearly half a million registered members and around 190 000 available resources. Whether there are teaching plans, exercises, extra-curricular activities, literary comments or exam notes and materials, teachers, parents and pupils have the possibility to use, share, comment and benefit from the available resources. There's only one catch here... what's missing in this example is for the materials to have an open licence. Although nobody minds if the materials are used, distributed and remixed, it's not exactly legal from the copyright law perspective. Hopefully, it's only a matter of time until we will be proud to add didactic.ro to the list of CC wonderful case studies.*

### **Side talk: Digital textbooks with a very light touch of OER**

*There is a hot debate going on about digital textbooks for 1st and 2nd grade textbooks, however the legislative proposals do not mention copyright issues. When it comes to the format of the textbooks, NGOs are trying to channel the discussions towards having open textbooks. Therefore, we have to hope for political willingness to extent the idea of OER to digital textbooks. It would be a great opportunity for the Romanian educational system. The Ministry of Education is currently working on a web page ([www.manuale.edu.ro](http://www.manuale.edu.ro)) where all the digital textbooks are going to be freely available for download. We are waiting for more info on this and to see how this project will be implemented, what type of format is going to be used and under what licences.*

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### **The first policy breakthrough**

*In its strategic national governmental plan for 2013-2016, the Romanian government mentioned for the first time Open Educational Resources and the integration of IT methods for learning. The strategic plan states that the Romanian Government, together with the Ministry of Education, will 'support innovative methods for integrating web 2.0 educational resources and open educational resources in the learning process'. At the same time, this governmental plan is backed up by the European Open Data initiative and by signing the Open Government Partnership in 2011. In conjunction to this, the National Education Law mentions a Virtual Library and an e-Learning platform. However, there are no norms as to how this law should be applied.*

*In short, the progress is slow, but at least there are some policy and legislative texts to fall back on and to give decision-makers a sense of direction.*

### **A step forward**

*A strong civil movement is starting to take shape regarding OER and open licences in a more broader sense. There are several NGOs who usually partner up and work together in these kinds of open initiatives. The most recent example is a project on OER organized together by ApTI (The Association for Technology and Internet), Kosson, ANBPR and Soros Foundation. In the next months they are going to organize 4 workshops in 4 different cities in Romania and talk to librarians, academics and university staff about copyright issues, open licences and OER. They launched this project at the national librarian's conference in Sibiu which took place between 10-12 October. The first conclusions are that OER could definitely find its place amongst the projects librarians are designing and implementing all over the country for their local communities.*

*At the same time, there are other small initiatives such as an open legal education website that wants to make the legal language more accessible and empower people with information about their rights while promoting civil engagement. Although it is still under construction, we are hoping to see the beta version of the website some time at the beginning of next year.*

*I am looking forward for more initiatives and results in OER as the wave of curiosity is gradually starting to build up. More information on the OER situation in Romania will soon be available in a report written by the Soros Foundation some time by the end of this year. <sup>[6]</sup>*

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## 5 Guidelines for Governments on OER in Higher Education

The governments' roles in higher education and their relationships with institutions in this sector differ widely from country to country. Usually, governments can play an important role in setting policies for higher education systems as it is in their interest to guaranty that public investments in higher education make a beneficial and cost-effective contribution to socio-economic developments. Most governments also give financial support to some universities.<sup>[7]</sup>

Consequently, governments are frequently in a position to require that educationally useful resources developed with public funds be made available under open licences. The sharing of educational resources has a substantial potential to improve the quality, accessibility and transparency of higher education systems, even though there are sometimes reasons for not requiring open licensing. Similarly, open licensing regimes can be used by governments to increase the leverage of public investments by facilitating extensive reuse of those resources with minimal additional investment.<sup>[7]</sup>

Given these circumstances, it is suggested for the governments to:

- **Support the OER use through their policy-making role in higher education.**

This could involve encouraging and supporting the use of OER in adapting learning experiences to a larger variety of learners and supporting national social-inclusion programmes. Thus, it would be possible to encourage equitable access to higher education and improve learning results for all learners. Sustainability of this effort might be stimulated by setting up a government programme in support of OER creation and reuse.<sup>[7]</sup>

- **Consider adopting open licensing frameworks.**

One effective method of accelerating open licensing and the sharing of higher education resources would be to adopt a suitable national open licensing framework, within policy outlines. This could form a part of an overarching policy framework on intellectual property rights (IPR) and copyright in higher education that spans teaching as well as research activities. Such a licensing outline could cover the copyright and IPR status of educational resources produced by government departments and agencies as well.<sup>[7]</sup>

- **Consider adopting open standards.**

Linked to the above could be the adoption of suitable open standards, the purpose of which would be to guarantee full access to and the use/sharing of materials in higher education. This could comprise research as well as educational publications, and would help to ensure the permanency of editable electronic documents regardless of software changes. These standards could cover educational resources developed by government departments and agencies and by institutions that receive government support for developing educational materials.<sup>[7]</sup>

- **Contribute to raising awareness of key OER issues.**

This could involve the production and sharing of good practice case studies and relevant examples of use to support implementation efforts. Governments can help higher education

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stakeholders understand issues regarding IPR, as well as IPR's challenges and redesign caused by the rapid digitization and online information and resource sharing. [7]

- **Promote national ICT/connectivity strategies.**

Regarding the ICT's centrality of accessing and sharing contents online, such support could concentrate on guaranteeing sustained provision of connectivity and staff/student access to ICT within higher education systems. [7]

- **Support sustainable development and sharing of quality learning materials.**

Supporting higher education institutions, individually as well as collectively, in their efforts to develop and share high quality educational materials would be crucial for the sustainable development and use of OER. This could include support for national initiatives of development of local content and fostering of tools as to promote quality in OER, as well as regional/global efforts to develop OER repositories and directories. While there is no single strategy applicable for every situation, a coordinated approach would likely yield the best results. [7]

## 6 Guidelines for Higher Education Institutions on OER

Higher education institutions (HEI) can play a crucial role in supporting their teaching staff in the development of effective teaching and learning environments for students and providing ongoing opportunities for professional progress. Both identifying as well as developing learning resources are essential parts of this process. Institutions should strive towards creating OER as well as using OER from elsewhere. Well-designed learning materials in terms of information, ideas and content stimulate greater individual engagement by students than lectures alone. With these materials becoming an important part of the teaching and learning process, limited face-to-face teaching time with students could be more efficiently used to foster engagement as well as to encourage discussion, practical applications, creativity and research activities. [7]

For the purpose of developing courses and learning materials, teaching staff naturally uses what is available. Their choice is widened by the growing number of OER, which also creates opportunities for new materials to be adapted in order to fit the local settings in terms of culture and learning needs, without extensive copyright negotiations or duplicating content development. [7]

Experience shows that when institutions make good quality courses and resources publicly available online they can attract new learners, advance their public service role and expand their institutional reputation. Such institutions may also attract research funding by furthering the dissemination of research results. Nonetheless, institutions must position OER within their institutional branding and take into account any income generated by the sales of their educational resource. In this context, HEI are suggested to [7]:

- **Develop institutional strategies for the integration of OER.** [7]

- 
- **Provide stimulations to support investment in the development, adaptation and acquisition of high quality learning resources.**

Institutional policies should be reviewed to:

- Encourage judicious selection and adaptation of existing OER, as well as the development of new resources where required;
- Promote the publication of educational resources as OER within institutional protocols;
- Promote research on using, reusing and repurposing OER;
- Encourage students to publish their work (with the guidance of academic staff and within institutional protocols) under an open licence as OER;
- Build OER into tools for individual and institutional monitoring;
- Promote collaboration both within and beyond the institution in developing resources;
- Provide staff with appropriate motivations and rewards for the development, acquisition and adaptation of learning resources, and
- Ensure that staff workload models take curriculum, course and material design and development into account. [7]

- **Recognise the significant role of educational resources within internal quality assurance processes.**

This should contain establishing and maintaining a strict internal process for validating the quality of educational resources prior to their publication as OER. [7]

- **Consider creating flexible copyright policies.**

Such policies could make it easier for staff to invoke some-rights-reserved copyright or other licensing permutations when necessary. These policies could be a part of a broader institutional process to guarantee that robust, enforceable IPR, copyright and privacy policies are in place and accurately reflected in all legal contracts and conditions of employment. [7]

- **Undertake institutional advocacy and capacity building.**

In order to develop the complete range of required competences for facilitating a more effective use of OER, ongoing awareness-raising, capacity-building (staff development) and networking/sharing could be carried out. The aim of these actions would be encouraging a shared vision for open educational practices within the organisation, which would ideally be aligned to the vision and mission of the institution and linked to incentives. [7]

- **Ensure ICT access for staff and students.**

This means aspiring to ensure that academic staff and learners have ubiquitous access to the necessary ICT infrastructure, software and connectivity in order to access the internet and develop or adapt different educational resources. This should contain software applications like Web content editing tools, content management systems, templates and toolkits facilitating the creation and use of adaptable, inclusively designed educational materials. It might also involve developing a repository of the work by the academic staff and students work that could serve as a potent teaching and learning resource, while raising

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awareness of the difference between appropriate sharing/collaboration and plagiarism. Staff and students should also have access to training/professional development and support to use these systems. [7]

- **Establish institutional policies and practices to store and access OER.**

This would involve the capacity to store, manage and share materials and content, internally as well as externally, so that academic efforts could build on an expanding base of institutional knowledge. The most cost-effective way for something like this could be to do it as part of a coordinated national strategy or in partnership with emerging global OER networks and repositories that are based on open standards. [7]

- **Review institutional OER practices periodically.**

Such reviews would be helpful for the institution to determine the value of its practices and policies. They could also include reviews of the degree to which the openly licensed educational resources are used in higher education programmes. In addition, these reviews could also contain the assessment of the effects of this use on the quality of educational delivery as well as its influence on the cost of developing/acquiring high quality teaching and learning resources for undergraduate and postgraduate programmes. Where it is deemed applicable, this might be extended to displaying examples of good practice, in marketing publications as well as in academic research publications. [7]

## 7 Conclusions

In order for an effective OER to be developed, good strategic choices have to be accompanied by reviews of institutional policies. First and foremost, institutions will need to review their policies related to intellectual property and guarantee that they support open licensing models. They will also need to review their policies concerning staff payment and incentives, ensuring that their time spent on course designing and developing as well as other related activities is suitably rewarded through salary increases and promotions, as part of wider policies covering staff remuneration and incentives. [8]

For the purpose of expediting these actions, supportive policy environments would be essential for any sustainable effort to utilize the potential of OER, be it at a national or institutional level. [8]

In comparison with the growing number of initiatives that currently exist in Europe in correlation with OER, the list of policies dealing with this area is relatively short. Even though OER are designed to be used by virtually anyone that has access to the internet, it is quite interesting to see that almost all European policies are still written only in the national language.

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## Appendix A

### WORLD OPEN EDUCATIONAL RESOURCES (OER) CONGRESS UNESCO, PARIS, JUNE 20-22, 2012

#### 2012 PARIS OER DECLARATION

##### Preamble

The World OER Congress held at UNESCO, Paris on 20-22 June 2012,

*Mindful of relevant international statements including:*

The Universal Declaration of Human Rights (Article 26.1), which states that: “Everyone has the right to education”;

The International Covenant on Economic, Social and Cultural Rights (Article 13.1), which recognizes “the right of everyone to education”;

The 1971 Berne Convention for the Protection of Literary and Artistic Works and the 1996 WIPO Copyright Treaty;

The Millennium Declaration and the 2000 Dakar Framework for Action, which made global commitments to provide quality basic education for all children, youth and adults;

The 2003 World Summit on the Information Society, Declaration of Principles, committing “to build a people-centred, inclusive and development-oriented Information Society where everyone can create, access, utilize and share information and knowledge”;

The 2003 UNESCO Recommendation concerning the Promotion and Use of Multilingualism and Universal Access to Cyberspace;

The 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expression, which states that: “Equitable access to a rich and diversified range of cultural expressions from all over the world and access of cultures to the means of expressions and dissemination constitute important elements for enhancing cultural diversity and encouraging mutual understanding”;

The 2006 Convention on the Rights of People with Disabilities (Article 24), which recognises the rights of persons with disabilities to education;

The declarations of the six International Conference on Adult Education (CONFINTEA) Conferences emphasising the fundamental role of Adult Learning and Education.

*Emphasizing* that the term Open Educational Resources (OER) was coined at UNESCO's 2002 Forum on Open Courseware and designates "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. Open licensing is built within the existing framework of intellectual property rights as defined by relevant international conventions and respects the authorship of the work";

*Recalling* existing Declarations and Guidelines on Open Educational Resources such as the 2007 Cape Town Open Education Declaration, the 2009 Dakar Declaration on Open Educational Resources and the 2011 Commonwealth of Learning and UNESCO Guidelines on Open Educational Resources in Higher Education;

*Noting* that Open Educational Resources (OER) promote the aims of the international statements quoted above;

Recommends that States, within their capacities and authority:

- a. *Foster awareness and use of OER.* Promote and use OER to widen access to education at all levels, both formal and non-formal, in a perspective of lifelong learning, thus contributing to social inclusion, gender equity and special needs education. Improve both cost-efficiency and quality of teaching and learning outcomes through greater use of OER.
- b. *Facilitate enabling environments for use of Information and Communications Technologies (ICT).* Bridge the digital divide by developing adequate infrastructure, in particular, affordable broadband connectivity, widespread mobile technology and reliable electrical power supply. Improve media and information literacy and encourage the development and use of OER in open standard digital formats.
- c. *Reinforce the development of strategies and policies on OER.* Promote the development of specific policies for the production and use of OER within wider strategies for advancing education.
- d. *Promote the understanding and use of open licensing frameworks.* Facilitate the re-use, revision, remixing and redistribution of educational materials across the world through open licensing, which refers to a range of frameworks that allow different kinds of uses, while respecting the rights of any copyright holder.
- e. *Support capacity building for the sustainable development of quality learning materials.* Support institutions, train and motivate teachers and other personnel to produce and share high-quality, accessible educational resources, taking into account local needs and the full diversity of learners. Promote quality assurance and peer review of OER. Encourage the development of

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mechanisms for the assessment and certification of learning outcomes achieved through OER.

- f. *Foster strategic alliances for OER.* Take advantage of evolving technology to create opportunities for sharing materials which have been released under an open license in diverse media and ensure sustainability through new strategic partnerships within and among the education, industry, library, media and telecommunications sectors.
- g. *Encourage the development and adaptation of OER in a variety of languages and cultural contexts.* Favour the production and use of OER in local languages and diverse cultural contexts to ensure their relevance and accessibility. Intergovernmental organisations should encourage the sharing of OER across languages and cultures, respecting indigenous knowledge and rights.
- h. *Encourage research on OER.* Foster research on the development, use, evaluation and re-contextualisation of OER as well as on the opportunities and challenges they present, and their impact on the quality and cost-efficiency of teaching and learning in order to strengthen the evidence base for public investment in OER.
- i. *Facilitate finding, retrieving and sharing of OER.* Encourage the development of user-friendly tools to locate and retrieve OER that are specific and relevant to particular needs. Adopt appropriate open standards to ensure interoperability and to facilitate the use of OER in diverse media.
- j. *Encourage the open licensing of educational materials produced with public funds.* Governments/competent authorities can create substantial benefits for their citizens by ensuring that educational materials developed with public funds be made available under open licenses (with any restrictions they deem necessary) in order to maximize the impact of the investment.

Available at:

[http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/Events/English\\_Paris\\_OER\\_Declaration.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/Events/English_Paris_OER_Declaration.pdf)

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## Appendix B

### UNIVERSITY OF LEEDS

### OPEN EDUCATIONAL RESOURCES

*This document sets out the University's position and guidance on the use and publication of Open Educational Resources (OERs) within educational situations at the University.<sup>1</sup> It was endorsed by the Vice Chancellor's Executive Group and the Taught Student Education Board (as TSEB/12-15) in November 2012.*

#### Background

1. The University strategy is to provide students with an exceptional student experience centred on inspirational learning and teaching.
2. The University is committed to a blended learning strategy which includes within relevant disciplinary contexts realising the potential for transformation: in terms of course design, methods, and students "engagement with learning material by a considered and appropriate mixture of face-to-face interaction, carefully designed online course materials and tools, and enhanced contact with a wider distributed learning environment through relevant technologies".<sup>2</sup>
3. Staff use a wide range of self-generated teaching materials to support exceptional teaching, including teaching notes, hand-outs, audio, images, animations, multimedia materials and others.
4. Staff also provide students with resources generated from elsewhere within the University to support exceptional learning, for example from the University library.
5. Resources are in addition available beyond the University to support student learning. These may include images, audio/video resource, animations and other digital resources.
6. Open Educational Resources (OERs) are digitised teaching, learning and research resources that reside in the public domain or have been released by the copyright owner under an intellectual property licence (e.g. Creative Commons) that permits their use or re-purposing (re-use, revision, remixing, redistribution) by others.
7. Staff and students may wish to use OERs to enhance learning and teaching. A licence that permits use of an OER may require the user to re-publish the resource in which it is incorporated as an OER on the same terms. Staff and students may also wish to create and publish resources as OERs.

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<sup>1</sup> Which may include taught and research students, staff training and professional development courses.

<sup>2</sup> University Blended Learning Strategy BLFG/10/10.

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## University Position

8. The University encourages staff and students to use, create and publish OERs to enhance the quality of the student experience, provided that resources used are fit-for-purpose and relevant.
9. Use, creation and publication of OERs must be consistent with the University's reputation and values.
10. It is expected that OERs used, created or published by individual staff and students will normally be single units or small collections (e.g. podcast episodes, small collection of images etc.) rather than whole courses.
11. Whether or not OERs are used or published in a School, Department or Service is ultimately a decision for the Head of School, Head of Department or Head of Service as appropriate. Unless stated to the contrary, it is assumed that use, creation and publication of single units or small collections will be allowed. Where use, creation and publication are to be restricted, Schools, Departments and Services are encouraged to identify and communicate a rationale for restriction. It is expected that justifications for restriction will normally be based on protection of commercial interests.
12. University policies on IPR must be adhered to<sup>3</sup>. When using OERs, students and staff must comply with the terms of the licence of use.
13. When creating and publishing OERs, the copyright owner(s) must be visibly attributed. The copyright owner will normally be the University of Leeds for OERs created at the University.
14. All OERs used and created must comply with University policies on inclusiveness<sup>4</sup>.
15. The University reserves the right to remove resources that do not comply with its policies, and/or request removal of resources from external repositories/sites.

## Guidance

16. It is the responsibility of staff and students to ensure that they have the necessary rights to publish an OER and that all resources published comply with all relevant policies (e.g. copyright, IPR, accessibility).<sup>5</sup>
17. Staff are advised to publish OERs using an Attribution-NonCommercial-ShareAlike (CC BY-NC-SA 3.0) creative commons licence<sup>6</sup>. Other creative commons licences (e.g. to allow commercial use or remove the ShareAlike element) may be used if staff feel this is necessary or appropriate for their particular resource.

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<sup>3</sup> See University Library Copyright and Licences pages:

[http://library.leeds.ac.uk/info/371/copyright\\_and\\_licences/91/copyright\\_for\\_teaching](http://library.leeds.ac.uk/info/371/copyright_and_licences/91/copyright_for_teaching)

<sup>4</sup> See Equality Service <http://www.equality.leeds.ac.uk/university-policies-2/>

<sup>5</sup> Note that the University logo must only be released with additional restrictions within the creative commons licence

<sup>6</sup> See <http://creativecommons.org/licenses/by-nc-sa/3.0/>.

18. All resources released as OER must ensure that the University of Leeds is stated as the licensor and wording must be included on the resource such as © The University of Leeds or equivalent to ensure correct attribution.
19. Usually authors wish to formally assert a “moral” right to be properly acknowledged as the author. The University believes this is good practice as it gives proper recognition for work undertaken. The right must be positively asserted. To ensure proper attribution, a good form of wording would be: *“The right of [name of author] to be identified as author of this work has been asserted by them in accordance with the Copyright, Designs and Patents Act 1988”*.
20. The University recommends that written and interactive digital teaching resources should be deposited in the national repository for Higher Education OERs, JORUM<sup>7</sup>. Where individual circumstances dictate that resources need to be deposited in other repositories (e.g. discipline specific needs or funder requirements), an entry should be created in JORUM to direct viewers to the source resources.
21. The University recommends that audio/video based OER teaching resources should be deposited in the University’s multimedia repository(s) and/or chosen external multimedia repository(s).
22. The University recommends that digital library objects /collections should be deposited in the University digital libraries.
23. Staff are encouraged to collect data on usage of their OERs by students and external institutions for quality assurance mechanisms (e.g. module / programme review) and for staff recognition, reward and progression.
24. Where students are producing OERs as part of their programme of study or within a staff-directed project, these guidelines should be followed and OERs should be checked by a member of staff before publication externally.

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[http://wiki.creativecommons.org/University\\_of\\_Leeds\\_Open\\_Educational\\_Resources\\_guidance](http://wiki.creativecommons.org/University_of_Leeds_Open_Educational_Resources_guidance)

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<sup>7</sup> <http://www.jorum.ac.uk>

<sup>8</sup> <http://library.leeds.ac.uk/digital-about>