Impact of International Organizations on Governmental OER Policies

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PhD Research Topic

Impact of International Organizations on Governmental OER Policies

Supervisors:

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Dr. Cable Green (Creative Commons)
Why Focus on OER?
OER can make education:

• More Accessible
• Affordable
• Efficient
• Contribute to improved quality
• Sustainable

While, at the same time, contributing to:

• widening access
• expansion of lifelong learning opportunities


Since 2002, thousands of resources released as OER
Why Focus on OER Policies?
OER policies (at provincial, state and/or national levels) are needed in order to advance mainstreaming and uptake of OER practices (openness in education)

(Mulder, 2013; Bossu et al., 2012)
Why Focus on Governmental OER Policies?
In the context of widespread budget cuts, growing demand for education, and rising cost of education, governments are searching for new and innovative ways to address the growing demand for post-secondary education while making education more affordable, accessible and of better quality.

Governments around the world have been proposing strategies or approving policies related to OER (India, Netherlands, Indonesia, USA, Brazil, etc).
Recent Governmental OER Policy Developments

• Slovenia: Launch of OpeningupSlovenia
• Scotland and Wales
• Canada: Three provinces: British Columbia, Alberta and Saskatchewan
• South Africa
Recent Governmental OER Policy Developments

http://www.jisc.ac.uk/blog/open-and-online-wales-higher-education-and-emerging-modes-of-learning-09-apr-2014

http://conference.ocwconsortium.org/2014/a1ec_event/openingupslovenia/?instance_id=446

White Paper for Post-School Education and Training

http://www.chethegauntlet.ca/story/province-offers-money-open-textbooks


Why Focus on Impact of International Organizations (IOs) on Governmental OER Policies?

IOs = organizations with international membership, scope, mandate and activities. IOs can be divided into Intergovernmental organizations (IGOs) – sovereign states and International nongovernmental organizations (INGOs)
• IOs increasingly seen as policy actors as opposed to just policy advisors or mediators (Henry et al., 2001)

• National policymaking is still largely mediated by national politics and traditions

However

• It is increasingly linked to globalized policy discourses, pressures from Inter-governmental Organizations (IGOs) and/or global policy networks (INGOs, etc.) (Rizvi and Lingard, 2010)
Why focus on International Organizations (IOs)

- While there appears to be consensus about the influence of IOs on national policy making little is known about whether and how these IO’s influences translate into concrete national policies or how they affect national policy making in general.

  (Shahjahan, 2012; Christensen, 2006)
Research Questions

- What key OER policy instruments can be identified with different IOs?
- What impact have these key IO OER policy instruments on Governmental OER policies?
- What recommendations, if implemented, would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies?
Which IOs?

- IGOs
- INGOs
Which IGOs?

- EC
- WB
- OECD
- OIF
- UNESCO
- COL
- OAS
IGOs: Instruments to Influence educational policy processes at global & national levels

- Producing policy reports
- Providing financial support through loans and funding initiatives
- Data collection and analysis
- Offering policy advice
- Sponsoring or organizing international/regional conferences and networks
- Providing analytical assistance
- Issuing non-binding and binding guidelines or declarations
- Carrying out country and thematic reviews (Balzer and Martenass 2004; Shuller and Vincent-Lancrin, 2009)
IGOs: Some notable OER Policy Instruments

- UNESCO: Paris OER Declaration
- OECD: Policy Recommendations
- UNESCO/COL: OER handbooks and policy template
- EC: Opening up education
Which IOs?

IOs

IGOs

INGOs
Which INGOs?

Selection criteria: Currently influencing global/national educational policy landscape or potential to do so in the future

INGOs

OCWC

OPN

CC

OER Africa

OER Asia
INGOs: Policy Instruments

• Producing policy reports
• Providing policy advice
• Data collection and analysis
• Carrying out country and thematic reviews
• Advocacy (national and global levels)
• Organizing international conferences and networks
• Actively promoting and encouraging OER practices at HEIs
Foundations

Included because:

- Early catalytic players in the field (providing seed funding for OER projects)
- Small amount of funding = national initiatives in some cases
- While government funding and policy is more important, it is necessary to document such processes/impact of foundations (part of policy process)
Which Foundations?

Foundations

IDRC

Hewlett

Saylor

Gates

OSF

Shuttleworth

Qatar F.
Foundations: Policy Instruments

- Providing seed funding for new initiatives
- Organizing and sponsoring meetings with various stakeholders
- Providing funding for research initiatives in order to increase impact evidence base (part of policy process)
### Which Governments are included in the study?

**Level of analysis (jurisdictions): provincial/state, national**

<table>
<thead>
<tr>
<th>Country</th>
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<tbody>
<tr>
<td>Kenya</td>
<td>Nigeria</td>
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<tr>
<td>Senegal</td>
<td>South Africa</td>
</tr>
<tr>
<td>Brazil</td>
<td>Canada (2 provinces)</td>
</tr>
<tr>
<td>Colombia</td>
<td>Chile</td>
</tr>
<tr>
<td>Mexico</td>
<td>USA (California/Washington)</td>
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<tr>
<td>China</td>
<td>India</td>
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<td>Indonesia</td>
<td>Mongolia</td>
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<td>Oman</td>
<td>Turkey</td>
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<tr>
<td>France</td>
<td>Netherlands</td>
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<tr>
<td>Poland</td>
<td>Russia</td>
</tr>
<tr>
<td>Slovenia</td>
<td>UK (England, Scotland, Wales)</td>
</tr>
<tr>
<td>Australia</td>
<td>New Zealand</td>
</tr>
</tbody>
</table>
## Research Methodology Step I (IOs)

**Case studies approach**

<table>
<thead>
<tr>
<th>Steps (IOs)</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification of main representatives from IOs for the interviews</td>
<td>May 2014 – July 2014</td>
</tr>
<tr>
<td>Desktop research: identification of the key OER policy instruments at IO level for influencing OER policy developments or changes (to be validated and specified during interviews)</td>
<td>May 2014 – September 2014</td>
</tr>
<tr>
<td>Developing interview protocol</td>
<td>October 2014 – December 2014</td>
</tr>
<tr>
<td>Interviews with IO representatives (validating and specifying key OER policy instruments and exploring intended &amp; observed impact)</td>
<td>January 2015 – June 2015</td>
</tr>
<tr>
<td>Interviews: analysis and write up and validation of interview results with interviewees from IOs</td>
<td>July 2015 – December 2015</td>
</tr>
<tr>
<td>Publication of results (articles, book chapters)</td>
<td>TBA</td>
</tr>
</tbody>
</table>
# Research Methodology Step II (Foundations)

**Case studies approach**

<table>
<thead>
<tr>
<th>Steps (Foundations)</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification of main representatives from Foundations for the interviews</td>
<td>May 2014 – July 2014</td>
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<tr>
<td>Desktop research: identification of the key OER policy instruments for influencing OER policy developments or changes (to be validated and specified during interviews)</td>
<td>May 2014 – September 2014</td>
</tr>
<tr>
<td>Developing interview protocol</td>
<td>October 2014 – December 2014</td>
</tr>
<tr>
<td>Interviews with representatives of foundations (validating and specifying key OER policy instruments and exploring intended &amp; observed impact)</td>
<td>January 2015 – April 2015</td>
</tr>
<tr>
<td>Interviews: analysis and write up and validation of interview results with interviewees from Foundations</td>
<td>May 2015 – July 2015</td>
</tr>
<tr>
<td>Publication of results (articles, book chapters)</td>
<td>TBA</td>
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</tbody>
</table>
### Research Methodology Step III (Governments)

<table>
<thead>
<tr>
<th>Steps (Governments)</th>
<th>Timelines</th>
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<tbody>
<tr>
<td>Identification of CCPGs</td>
<td>May 2014 – July 2014</td>
</tr>
<tr>
<td>Desktop research: main OER policy developments that have taken place in specific countries (in consultation with CCPGs)</td>
<td>August 2014 – December 2014</td>
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<tr>
<td>Identification of government representatives for interviews (in consultation with CCPGs)</td>
<td>August 2014 – December 2014</td>
</tr>
<tr>
<td>Developing interview protocol</td>
<td>January 2015 – March 2015</td>
</tr>
<tr>
<td>Training of CCPGs responsible for conducting interviews in some of the countries included in the study</td>
<td>April 2015 – June 2015</td>
</tr>
<tr>
<td>Interview analysis and write up</td>
<td>August 2016 – February 2017</td>
</tr>
<tr>
<td>Validation of results (Delphi Technique)</td>
<td>October 2016 – May 2017</td>
</tr>
<tr>
<td>Publication of results</td>
<td>TBA</td>
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</tbody>
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Research Methodology Step III (Governments)

Case studies approach

Country Contact Points for Governments (CCPGs) involvement is crucial for the following reasons:

- To help identify any relevant national OER policy developments in specific countries including relevant policy documents. This step will be conducted prior to interviews with government representatives.
- To help identify and approach the appropriate government representatives to be interviewed.
- In some cases to conduct the interviews with the government representatives on behalf of the PhD researcher and under his primary responsibility for preparing the interview instruments. This is due to limitations in time and capacity of the PhD researcher (with such an ambitious long list of governments) and to financial constraints (travel, etc) or language demands in specific countries.
Research Methodology Step IV (Recommendations)

<table>
<thead>
<tr>
<th>Steps (Recommendations)</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing Recommendations based on outcomes from Steps 1-3</td>
<td>June 2017 – October 2017</td>
</tr>
</tbody>
</table>
Research Questions

• What key OER policy instruments can be identified with different IOs?

• What impact have these key IO OER policy instruments on Governmental OER policies?

• What recommendations, if implemented, would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies?
Research Methodology (Overall Summary)

• Protocolled interviews with representatives from IOs will serve to identify the key OER policy instruments at IOs level and to explore the intended and observed impact of such instruments on national OER policy making (answering research question 1).

• Protocolled interviews with government representatives will serve to analyze the (perceived) impact of the key IO OER policy instruments on governmental OER policies (answering research question 2).

• Based on the findings from research questions 1 and 2 the study will provide recommendations that would lead to IO OER policies and policy instruments more effectively supporting governmental OER policies (answering research question 3).


References III
