

Regional Consultations for the 2nd World OER Congress

Organised by the Commonwealth of Learning in partnership with UNESCO and the Slovenian National Commission for UNESCO and UNESCO Chair in Open Technologies for OER and Open Learning (Jožef Stefan Institute, Slovenia) with the generous support of The William and Flora Hewlett Foundation

Survey Questionnaire

This survey is conducted within the framework of the Regional Consultations for the 2nd World OER Congress. The objective of this survey is to establish a global understanding of national OER development today. In this regard, ministries responsible for education in all UNESCO and Commonwealth of Learning (COL) Member States are invited to submit their responses to the questions below. The responses from this survey will be part of a consolidated global report on the status of OER to be made available at the 2nd World OER Congress in September 2017. This survey will take about 45 minutes to complete.

Definitions:

- **Open Educational Resources (OER)** are any educational resource that may be freely accessed, copied, reused, adapted and shared *and* which are available under an open licence or are in the public domain for use without paying licensing fees. OER can include lecture notes, slides, lesson plans, textbooks, handouts given to students, videos, online tutorials, podcasts, diagrams, entire courses, and any other material designed for use in teaching and learning.
- An **Open Licence** is a licence that allows copyrighted materials to be used, adapted and redistributed without permission from the copyright holder. The best-known open licences are the Creative Commons Licences, which provide legal mechanisms to ensure that people retain copyright over and acknowledgement for their work while allowing it to be shared under the terms and conditions of their choice.
- **Public Domain** refers to materials for which the copyright has expired or whose author has relinquished the copyright.

The *Regional Consultations for the 2nd World OER Congress: Background Paper* sets the stage for the project.

The expected outcomes of this study are to:

- identify the current status of implementation of the recommendations made at the World OER Congress (2012) among key stakeholders, namely, governments, policy makers, the OER community and the wider education community;
- initiate discussions amongst the key stakeholders regarding the strategies to deal with the identified challenges to mainstreaming OER;
- build awareness amongst key stakeholders about the objectives of the 2nd World OER Congress, and
- Develop strategies that will support stakeholders to move from commitment to action.

We thank you warmly for your co-operation.

Instructions

1. The survey is to be completed by a government official who can comment holistically on the status of OER in his/her country. Key stakeholders should be consulted, if required, to ensure the accuracy and integrity of the information provided.
2. Please feel free to include in your responses references to additional documents or hyperlinks (URLs) to information.
3. Tick multiple answers when appropriate or necessary.
4. This survey can be filled online. The form is available at: <http://fluidsurveys.com/s/rcoer-survey/> , or it can be filled using this form.
5. Should you encounter any difficulty, please contact rcoer@col.org for assistance.
6. Please send the completed form via email to rcoer@col.org (if filing the offline form).

1. General Information

Country _____

Name of Responsible Official/Stakeholder: _____

Title/Function/Affiliation: _____

E-mail: _____

Phone: _____

2. Strategy and Policy

OER policies are laws, rules and courses of action that facilitate the creation, use or improvement of OER. These questions ask about OER policies that have been adopted by government or education institutions.

2.1 Does your country have policies supporting OER?

- ☐ Yes; give example or web link: _____
☐ No ☐ Don't know

2.2 If your response to 2.1 is "Yes," which type is it?

- ☐ National ☐ Institutional ☐ Project

2.3 If your response to 2.1 is "Yes," does it specify which open licence(s) to be used?

- ☐ Yes; please specify: _____ ☐ No

2.4 Is there reference to OER in any government or state/regional educational strategy, planning or similar documents?

- ☐ Yes; please specify: _____ ☐ No

2.5 If your country does not have an OER policy/strategy, are you contemplating policy development for OER?

- ☐ Yes; please specify: _____ ☐ No

2.6 Are you aware of the [OER Policy Registry](#) – a project of the Open Policy Network?

- ☐ Yes ☐ No

3. OER Activities

OER activities refer to the creation, use or sharing of OER. These questions ask about OER actions by government or education institutions.

3.1 Is your country actively engaged in OER in the following ways? (You can tick more than one option.)

- ☐ Yes, through initiatives by institutions and engaged individuals. Please specify below.
☐ Yes, through specific projects or programmes with public funding. Please specify below.

- ☐ Yes, through specific projects or programmes with private funding. Please specify below.
- ☐ Yes, through specific projects or programmes with donor funding. Please specify below.
- ☐ Yes, through government initiatives, including specific measures and incentives. Please specify below.
- ☐ Yes, otherwise. Please specify below.
- ☐ No

Please specify:

3.2 Why did your country decide to be actively involved in OER? (You can tick more than one option.)

- ☐ To promote open and flexible learning opportunities

☐ To increase the efficiency and quality of learning resources

☐ The cost-efficiency of OER

☐ The innovative potential of OER

☐ For access to quality resources

☐ To showcase quality local initiatives

☐ To make publicly funded resources available to a wide audience

☐ Other comments:

3.3 Please specify where OER activity is taking place in your country according to these educational subsectors, using the International Standard Classification of Education (ISCED).¹

	None	To some extent	To a great extent	Don't know
Primary Education (ISCED 1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Education (ISCED 2 and 3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post-Secondary/Not Tertiary (ISCED 4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tertiary (ISCED 5–8)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other comments:				

¹ See http://en.wikipedia.org/wiki/International_Standard_Classification_of_Education#ISCED_defined_levels_of_education.

3.4 Do you think your country might become active in developing and/or using OER in the near future?

- | | |
|--|--|
| <input type="checkbox"/> Yes, by explicitly stimulating initiatives in this field | <input type="checkbox"/> No, but it might become active in the medium term |
| <input type="checkbox"/> Yes, by introducing subsidy programmes or project funding | <input type="checkbox"/> No, we do not expect this to be or to become a priority |
| <input type="checkbox"/> Yes, by developing a dedicated governmental action plan | <input type="checkbox"/> Other comments: |
| <input type="checkbox"/> Yes, other. Please specify: | |
| | |
| | |
| | |
| | |

3.5 If the answer to Question 3.4 is "Yes," please specify why your country wants to become active in developing and/or using OER in the near future (you can tick more than one option.)

- | | |
|--|--|
| <input type="checkbox"/> Gaining access to the best possible resources | <input type="checkbox"/> Becoming independent of publishers |
| <input type="checkbox"/> Promoting scientific research and education as publicly open activities | <input type="checkbox"/> Creating more flexible materials |
| <input type="checkbox"/> Bringing down costs for students | <input type="checkbox"/> Conducting research and development |
| <input type="checkbox"/> Bringing down institutional costs for course development | <input type="checkbox"/> Building sustainable partnerships |
| <input type="checkbox"/> Reaching disadvantaged communities | <input type="checkbox"/> Other. Please specify: |
| <input type="checkbox"/> Assisting developing countries | |
| | |
| | |

3.6 If the answer to Question 3.4 is "No," please explain why does your country not want to be active in the OER movement.

3.7 How has the use of OER influenced teaching and learning in your country?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Improved quality of teaching and learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved teacher professional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved student success and grades	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved collaboration amongst learners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved sharing of resources by teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Barriers to Mainstreaming OER

4.1 What are the most significant barriers to mainstreaming OER in your country?

	Very important	Important	Moderately important	Slightly important	Not important
Lack of users' capacity to access, reuse and share OER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language and cultural barriers (<i>ensuring that OER are contextualised to the linguistic and cultural contexts where they are used</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insufficient inclusive and equitable access to quality content (<i>ensuring that OER are accessible to persons with disabilities, and/or those who do not have sustainable and/or dependable access to the Internet, and ensuring that OER are of quality</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changing business models (<i>changes in the business models of educational producers, both OER and non-OER, due to factors related to the digitalisation of educational resources, amongst others</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of appropriate policy solutions (<i>ensuring the development of policy environments to support the mainstreaming of OER</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Capacity Building

4.2 Do relevant stakeholders have the necessary skills to access, use and share OER?

☐ Yes; please specify: _____ ☐ No

4.3 What skills are required to improve OER use? (You can tick more than one option.)

- | | |
|--|---|
| <input type="checkbox"/> How to find OER/sources | <input type="checkbox"/> ICT skills |
| <input type="checkbox"/> Evaluating the usefulness, determining the value and quality of OER | <input type="checkbox"/> Distributing OER, developing mechanism(s) to provide OER to students |
| <input type="checkbox"/> Performing adaptations, including translation | <input type="checkbox"/> Pedagogy skills |
| <input type="checkbox"/> Understanding licences and how they work | |

Language and Culture

4.4 Are there sufficient OER in the main language(s) of education in your country?

- ☐ Yes; please specify: _____
- ☐ No, please explain: _____
- ☐ Other comments: _____

4.5 What mechanisms are being used in your country to translate OER into the language(s) used for instruction?

4.6 What are the challenges in translating OER into the local language(s)?

	Very important	Important	Moderately important	Slightly important	Not important
Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other; please specify					

4.7 How can the challenge of translating OER best be addressed?

	Very important	Important	Moderately important	Slightly important	Not important
Using automated services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making translation part of institutional processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leaving the responsibility to individuals to translate OER as and when they use them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.8 What are the cultural barriers to using OER?

	Very important	Important	Moderately important	Slightly important	Not important
Sharing information from sources that are from other cultural or linguistic contexts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sharing of information from peer-group knowledge networks (versus recognised expert networks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tenure and promotion policies in educational institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other; please specify					

Ensuring Inclusive and Equitable Access to Quality Content

4.9 Have you ensured that your OER are accessible for persons with disabilities?

☐ Yes; please specify: ☐ No

4.10 Do you address issues of quality assurance related to OER?

☐ Yes; please specify: ☐ No

4.11 Do you support the use of OER in all ICT environments (e.g., are your OER mobile friendly)?

☐ Yes; please specify: ☐ No

Changing Business Models

4.12 Has there been a national discussion on sustainable learning resource production?

☐ Yes; please specify: ☐ No

4.13 Have OER produced in your country generated new businesses or enterprises?

☐ Yes; please specify: ☐ No

4.14 Which commercial industries (not directly related to education) do you think would be interested in building products and/or services on top of OER (e.g., telecoms, broadband providers, other governmental agencies)?

4.15 Do you face any challenges from other stakeholders in balancing OER with commercial interests?

☐ Yes; please specify:

☐ No

4.16 If you have answered “Yes” to Question 4.15, where does the challenge come from?

4.17 If you have answered “Yes” to Question 4.15, how do you address this?

☐ Engage publishers

☐ Encourage software manufacturers

☐ Support academic journals

☐ Other

Comments:

5 Please specify all known sources of funding for the development, use or deployment of OER in your country (government, institutions, donors, others):

6 Is your ministry involved as a partner in initiatives outside the ministry, open to all stakeholders (universities, teachers, learners, families, digital communities, economic and social partners, etc.)?

- 7 Please list and provide links (URLs) for any notable OER initiatives in your country that exist at a national, regional or local level. These may be national projects, NGO projects, institutional projects or other projects that provide access to OER or training for teachers about the use of OER. Please list notable initiatives:

- 8 Has your country conducted any research on contributing to OER use in education? Please provide references or relevant links (URLs) to significant country-specific research projects or initiatives:

- 9 Has your country conducted any research on OER in general?

☐ Yes; please specify: ☐ No

- 10 Do you have any other comments on your country's stance in relation to OER?

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