

Education  
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# Toolkit on Open Educational Materials for Higher Education Unions



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Education  
International  
Toolkit

# Toolkit on Open Educational Materials for Higher Education Unions

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# 1- WHY THIS TOOLKIT?

People have high expectations regarding technology's potential to transform higher education, specifically in terms of eliminating barriers to accessing educational content, such as costs, language and accessibility for people with disabilities. An increasing number of universities or Higher Education Institutions (HEIs) have repositories that enable people to store, catalogue, describe and search for content. Collaborative editing tools diversify content production and make it easier to review educational materials. Online class platforms allow one to build didactic sequences and distribute content linked to the curriculum. UNESCO recommends that states and education authorities adopt Open Educational Resources (OER) policies to make this infrastructure available in a fair, efficient, and sustainable manner.

However, this potential has not been developed evenly or equitably across the world. In fact, the Global Education Monitoring Report 2023 (UNESCO, 2023)<sup>1</sup> states that:

*"Online content is produced by dominant groups, affecting access to it."*

*"The production and use of OER is still largely concentrated in the Global North."*

*"Almost 90% of the content in higher education repositories with collections of open educational resources was created in Europe and North America."*

*"92% of the content in the global library OER Commons is in English."*

*"Massive Open Online Courses (MOOCs) mainly benefit educated students and those from wealthier countries."*

According to the report, HEIs in the Global South have not made sufficient progress in adopting OER, focusing their efforts on Open Access to scientific publications and neglecting educational content. Inadequate infrastructure, a lack of knowledge among teachers about the potential of OER and no incentives to use it are some of the main challenges..

Progress has also been lacking in terms of global inclusion and diversity. Due to the dominance of English and European languages, the challenge to "decolonise" OER available online persists in the Global South. While the quantity of materials available online has been increasing, significant barriers in terms of access still exist worldwide. There are currently 285 million blind or visually impaired people in the world, with 90% of them living in low-income countries in the Global South, and only between 1% and 7% of books are published in a format they can read (WIPO, 2016)<sup>2</sup>.

In this context, teachers' unions, students, and academic support staff are key players in promoting social dialogue on access to study materials in higher education and fostering transformative action. This toolkit aims to provide unions with basic knowledge about OER in higher education, as well as practical ideas and

1 UNESCO. 2023. Global Education Monitoring Report 2023: Technology in education – A tool on whose terms? Paris, UNESCO

2 WIPO, 2016, Marrakech Treaty – Helping to end the global book famine. [https://www.wipo.int/edocs/pubdocs/en/wipo\\_pub\\_marrakesh\\_overview.pdf](https://www.wipo.int/edocs/pubdocs/en/wipo_pub_marrakesh_overview.pdf)



examples to build a roadmap to influence public and institutional policies.

## 1.1- Who is this toolkit for?

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This toolkit will primarily support unions that have not yet actively promoted OER policies and projects. It will be particularly useful for:

- Members of the executive committee
- Union staff
- University library staff
- Knowledge access activists
- Teachers specialised in educational technology
- Teachers in general

## 1.2- How will this toolkit help?

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This toolkit will help education unions and activists to:

- Understand the OER model and UNESCO's OER Recommendations..
- Understand the benefits of the OER model, as well as the main barriers and challenges associated with its adoption.
- Develop arguments in favour of adopting OER policies in Higher Education Institutions.
- Build union capacity to drive OER initiatives.
- Identify opportunities to promote the development of government or institutional OER policies.

## 2- KEY CONCEPTS

Open Educational Resources (OER) are learning, teaching and research materials in various formats and media that can be in the public domain or protected by copyright. These materials are published under open licences that allow access, reuse, adaptation and redistribution without costs to third parties. While OER are primarily associated with digital and online educational technologies, they can also refer to printed materials..

The types of OER used in higher education are constantly evolving, reflecting the diversity of instructional media and the didactic functions these resources can adopt. In terms of formats, OER exist in various categories: from multimedia, such as photographs, digital radio, video conferences, videos, podcasts and simulations ; to text and digital graphics-based resources, including infographics, presentations, images and tables; and social formats such as social networks, blogs, web pages, and links. Emerging categories include interactive and gamified resources, covering educational games and interactive quizzes; augmented and virtual reality resources; as well as online collaboration resources such as educational wikis and digital portfolios.

Regarding didactic functions, OER offer a wide range of applications. Some are designed to structure course proposals in virtual environments through didactic units, complete courses, structures with options, teaching guides, forums and activities. Others focus more on content presentation, offering bite-sized knowledge, slides, e-books, articles, examples, notes, handbooks and textbooks. Additionally, there are specific OER for simulation and experimentation, such as virtual laboratories and

simulators, as well as those intended for analysis and practice, such as case studies, problems and exercises. Assessment includes elements such as exam questions, answers and headings. An additional category is learning analytics, which includes analytical dashboards designed to monitor student progress and other types of data visualisation included in open source data.

Based on the above, we can see that OER do not, in essence, represent a break from the educational materials that teachers have been always been using and creating. Rather, the uniqueness of OER lies in their distribution and licensing model, which significantly differs from the traditional copyright model.

Historically, teachers have generated a wide range of educational materials, as mentioned earlier. However, these materials are often subjected to copyright laws that restrict their reproduction and distribution, limiting access to them and their potential to reach a wider audience. In contrast, OER are designed to be freely accessible and reusable. This is a paradigm shift in how intellectual property rights are managed, allowing for a smoother flow of knowledge.

What sets OER apart from conventional educational materials is the use of open licences. These licences, such as those offered by Creative Commons, enable materials to be copied, distributed, adapted and even used to create derivative works without the need to pay royalties or obtain explicit permission from the original author. This licencing model is in keeping with the digital era and the culture of sharing it embodies, making materials easily downloadable,

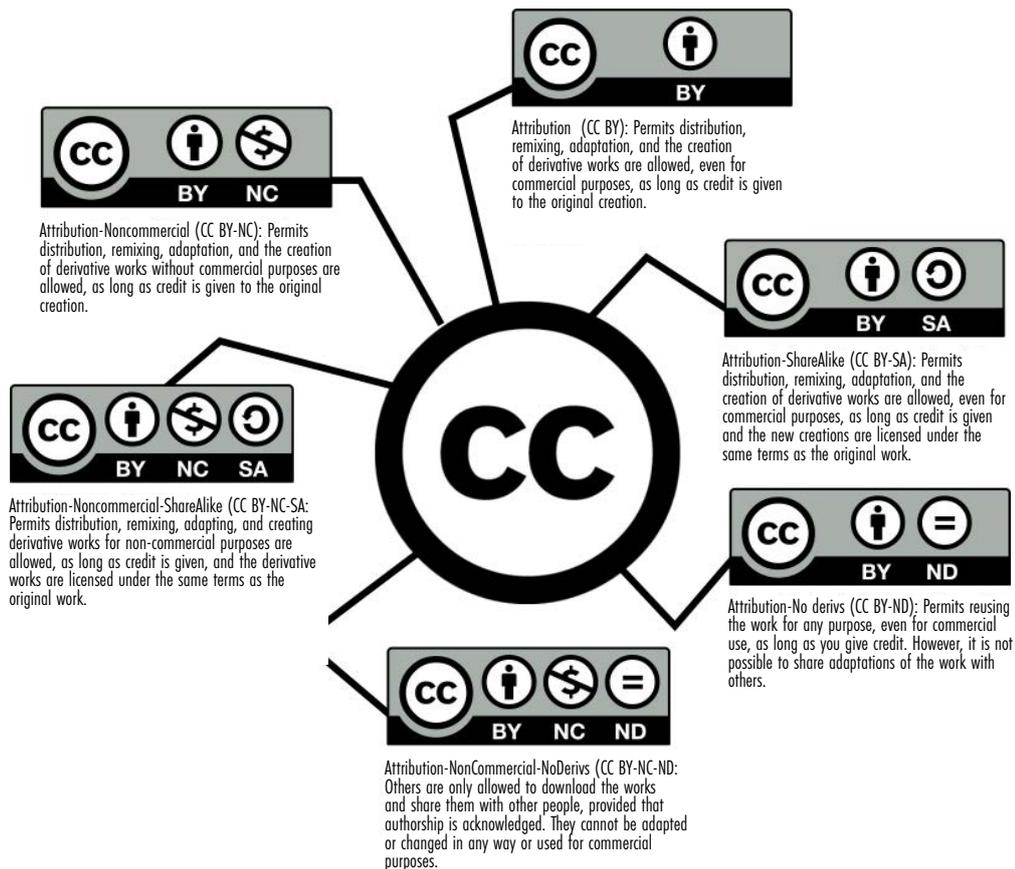


changeable and distributable in various formats and platforms.

In this way, OER are configured to adapt traditional pedagogical methods and techniques to the possibilities and challenges presented by the information society. In doing so, OER offer a solution to the dilemma between protecting intellectual property rights and ensuring democratic access to knowledge, proposing a model of collaboration and sharing that has the potential to enrich both teaching and learning in multiple contexts and at various levels.

## What are open licences?

An open licence is a legal instrument that allows copyright to be managed differently, moving away from the traditional "all rights reserved" scenario to one with "some rights reserved." Creative Commons licences are the most commonly used and provide a simple and standardised way to grant copyright permissions for creative works.



It is important to avoid using licences that contain the ND (No Derivatives) clause as this clause prohibits the translation, adaptation or updating of resources. Although this does not mean that only free and adaptable materials are valuable, the goal is always to achieve licensing agreements that increase access and participation, even if the highest levels of openness are not reached.

OER do not only contribute to addressing the prohibitive cost of higher education for many students. This is because cost should always be understood in a context of broader learning objectives and as such the potential for them to be "open" goes far beyond the economic aspect. **Open pedagogy** focuses on student-centred technological approaches and involves using OER to redesign courses so they become not only content repositories but

also platforms for learning, collaboration and engagement with the world beyond the classroom (DeRosa and Robison, 2017)<sup>3</sup>. Additionally, **open educational practices (OEP)** refer to collaborative practices that include the creation, use and reuse of OER, as well as pedagogical

3 DeRosa, R., and Robison, S. (2017). From OER to open pedagogy: Harnessing the power of open. In R. Jhangjani & R. Biswas-Diener (Eds.), Open: The philosophy and practices that are revolutionizing education and science, 115-124. <https://www.ubiquitypress.com/site/chapters/10.5334/bbc.i/download/5977>



## Benefits of OER

OER are a tool to improve access to study materials, allowing students to enter and stay in higher education.

OER can be updated and adapted to fit the context of students, turning teachers into active resource creators and supporting tailored education.

OER make it possible to adapt educational materials to indigenous languages, promoting language diversity and addressing the specific needs of students in different cultural contexts..

OER increase the efficiency of public and institutional spending on educational materials. Content funded with public money should be published in a format that can be legally reused.

OER can be legally adapted to different accessible formats such as screen readers, braille, audiobooks, sign language or easy reading.

OER allay teachers' concerns about potential copyright infringements, enabling unrestricted access to teaching materials.

practices that use participatory technologies and social networks for interaction, peer learning, knowledge creation and empowering students (Cronin, 2017)<sup>4</sup>.

### **2.1- UNESCO's push for the OER Model**

At its 40th session in November 2019, the UNESCO General Conference adopted the Recommendation on Open Educational Resources (OER)<sup>5</sup>. This Recommendation highlights the importance of education, information and communication technology (ICT) and the principles of the Universal Declaration of Human Rights concerning

the dissemination of information and knowledge without limitations.

Emphasis is placed on the need to ensure inclusive and equitable quality education and lifelong learning opportunities for all, in line with Sustainable Development Goal (SDG) 4.3 and 4.5<sup>6</sup> of the 2030 Agenda. The Recommendation underscores the importance of quality basic education and media and information literacy to access and benefit from ICT, including artificial intelligence.

The recommendation highlights the role of Open Educational Resources (OER) in promoting equitable, inclusive and participatory quality education, as well as strengthening academic freedom and teacher autonomy by providing a

4 Cronin, C. (2017). Openness and Praxis: Exploring the Use of Open Educational Practices in Higher Education. *The International Review of Research in Open and Distributed Learning*, 18(5). <https://www.irrod.org/index.php/irrod/article/view/3096>

5 Recommendation on Open Educational Resources (UNESCO General Conference, 2019) <https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer>

6 By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university. By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations. See: Sustainable Development Goal 4 (UNESCO) <https://www.unesco.org/gem-report/en/monitoring-sdg4>

broader range of educational materials. Furthermore, Member States are urged to implement the provisions of the Recommendation through appropriate measures, including legislative measures if necessary, and to report on actions taken to comply with it.

Stakeholders in the recommendation include various formal and non-formal education sectors, including teachers, students, government bodies, parents, education providers, educational institutions, support staff, teacher trainers, education policy-makers, cultural institutions such as libraries and museums, ICT providers, researchers, civil society organisations, publishers, the public and private sector, intergovernmental organisations, authors, copyright holders and others involved in education and technology.

## To learn more:

### Learn about Open Education:

[Getting Started with OER](#) (OER Global)  
[Recommendation on Open Educational Resources](#) (UNESCO)  
[Guidelines for OER in Higher Education](#) (UNESCO)  
[Copyright and Licensing Toolkit](#) (OER Africa)

### Learn to use Creative Commons licences

[Understand licence terms](#)  
[Licence your work](#)  
[Use and remix other people's materials](#)  
[Attribute authorship properly](#)

### Find educational resources to translate or adapt:

[Repositories](#)  
[Textbooks](#)  
[Book](#)

## 2.2-Objectives and Areas of Action of UNESCO's OER Recommendation

**Capacity building:** developing the capacity of all key education stakeholders to create, access and reuse OER, as well as to use open licences in a manner consistent with national copyright legislation.

**Supportive Policies:** Encouraging governments, education authorities and institutions to adopt regulatory frameworks for open licences for publicly funded educational materials, promoting inclusive and high quality education.

**Effective and Equitable Access:** Promoting strategies and programmes for sharing OER in multiple formats, including for persons with disabilities and vulnerable groups.

**Sustainability:** Supporting sustainability models at the national, regional and institutional levels, pilot testing new sustainable forms of education.

**International Cooperation:** Promoting cross-border partnerships to minimise duplication, create a global pool of culturally diverse, accessible, gender-sensitive, educational materials in multiple languages and formats.

The action areas proposed by UNESCO's OER Recommendation are:

**Capacity Building for OER:** The recommendations call for promoting capacity building to create, access, reuse, adapt and redistribute Open Educational Resources (OER). This involves raising awareness among various stakeholders about the benefits of OER, providing continuous training at all levels of education, providing information about copyright exceptions, using tools and technologies to enable secure access to OER, providing accessible information



resources and promoting digital literacy to understand open licences and related technologies. These measures aim to enhance effective use and collaboration to create and adapt OER in educational contexts.

**Development of Support Policies:** The creation of favourable regulatory environments for OER through participatory policies is encouraged. It recommends establishing policies that promote open licences or public domain status for publicly funded OER, as well as legal frameworks that encourage the creation, access and adaptation of OER in compliance with copyright laws. Furthermore, it suggests fostering communities of practice, recognising OER creation as a professional merit and promoting research on OER. It also emphasises the importance of protecting privacy and data in the production and use of OER. These policies aim to optimise access and effective use of OER in the field of education, promoting quality and collaboration..

**Promoting Effective, Inclusive and Equitable Access to Quality OER:** It aims to support the creation, access and adaptation of inclusive, equitable and quality OER for different stakeholders, including learners in formal and non-formal contexts, regardless of their age, gender, ability, or socio-economic situation. This includes vulnerable groups, indigenous peoples, rural populations, those affected by conflict or disasters, ethnic minorities, migrants, refugees and displaced persons. It suggests ensuring diverse modes of access, including offline access, and supporting the creation of gender and culturally relevant OER, including local and less commonly used languages. Furthermore, gender equality, non-discrimination, accessibility and inclusion in OER strategies and programmes are promoted, encouraging investment in ICT infrastructure and broadband to improve access. It recommends encouraging

research in OER and establishing quality assurance standards based on empirical data.

**Promoting Sustainability Models for OER:** The goal is to promote and support the development of comprehensive and integrated sustainability models for Open Educational Resources (OER), adapted to their contexts and government structures. It suggests reviewing procurement policies to facilitate the creation, adaptation and preservation of OER, encouraging diverse financing models, including non-traditional resources and partnerships and promoting innovation and added value in the use of OER. It also recommends establishing regulatory frameworks that support the interests of stakeholders, promoting the accurate translation of open licences and providing mechanisms to implement and continuously improve OER. It encourages collaboration at the institutional, national, and regional levels to optimise existing funds for education and research.

**Promoting and Strengthening International Cooperation:** It suggests promoting cross-border partnerships for OER projects and programmes, establishing regional and international financing mechanisms, supporting peer collaboration networks, incorporating OER clauses into international education agreements and looking into the creation of a global framework for copyright exceptions and limitations for educational and research purposes. Additionally, supporting intercultural communication skills and community strategies to apply OER at the local level and promote universal values is encouraged.

## 2.3- What do These Recommendations Imply for Teachers, Students, and Educational Institutions?

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### 2.3.1- For Teachers

**Comprehensive Training:** Teachers should receive ongoing and thorough training that includes both becoming familiar with OER technology and platforms as well as understanding open licences and how to reuse, adapt and redistribute the resources they create in their teaching activities. This will enable them to be prepared so they can make the most of online learning opportunities and effectively use OER in their educational practices, ensuring student access to quality resources.

**Integration into the curriculum:** Teachers should consider how OER align with curricular objectives and how they can be consistently incorporated into existing curricula. Adapting and customising OER to address specific student needs and classroom dynamics can enhance the quality of learning and promote deeper engagement.

**Collaboration and Community:** Engaging in communities of practice and teacher networks where participants share their experiences with OER can provide a valuable space for exchanging ideas and collaborating. Collaboratively creating educational materials in these communities can lead to the creation of richer and contextually relevant resources. Additionally, teamwork can reduce individual workloads and promote the dissemination of best practices.

### 2.3.2-For Students

**Equitable Access:** OER provides an opportunity to reduce disparities in access to education and quality resources. Teachers should be aware of differences in accessing technology and find ways to ensure all students have the opportunity to benefit from OER, either by providing offline alternatives or adapting materials for different platforms.

**Fostering Creativity:** OER can be a starting point for creative projects and research activities. By using a wide range of available resources, students can explore various approaches to problem solving and develop cognitive and socio-emotional skills such as critical and creative thinking.

**Fostering Autonomy and Self-directed Learning:** By accessing a variety of online resources, students can choose those that best suit their learning needs and preferences. This promotes autonomy and self-management, allowing them to explore, investigate and delve into topics of interest at their own pace. As students acquire skills to look for, assess and select relevant resources, they also develop research and decision-making skills that are beneficial to their academic and personal development throughout their life.

### 2.3.3- For Educational Institutions

**Supportive Policies:** Institutions should establish clear policies that support the creation, adaptation, use and publication of educational resources as OER. This could include incentives for teachers to develop and share their own resources, integrating OER into curricula and promoting innovative educational practices. These policies can institutionalise training programmes for teachers, facilitating access to a wide range of materials and pedagogical tools that can be adapted and tailored to meet



the specific needs of their students. By promoting the equitable distribution of resources, these policies can help protect teacher workload, allowing them to focus more effectively on their role as facilitators of learning rather than dedicating extensive time to creating materials from scratch.

***Technology Infrastructure:*** Institutions should invest in technology infrastructure that facilitates access to OER. This includes creating repositories and platforms for publication, quality assurance and cataloguing systems and ensuring students and teachers have access to devices and reliable connectivity to make the most of online resources, along with information literacy for efficient searches.

***International Collaboration:*** International collaboration and cooperation can greatly enrich the variety and quality of available OER. Institutions can establish partnerships with other educational institutions and international organisations to share and co-create educational resources that benefit a wide range of students and educational contexts, whilst also increasing the visibility of OER production within the institution.

## 3- OER IN HIGHER EDUCATION

Open Educational Resources (OER) have a profound and varying impact in the field of higher education, providing a range of benefits and opportunities for both institutions and teachers, as well as students.

In terms of access to high quality materials, OER enable higher education institutions to access a wide range of educational resources from various academic disciplines and levels. This not only enriches the provision of education but also helps teachers diversify their teaching methods and stay up-to-date on the latest developments in their fields.

Collaboration and sharing are key aspects driven by OER in higher education. Teachers can share their materials with colleagues both in their institution and outside it, encouraging the exchange of best pedagogical practices and the co-creation of educational content. This can also lead to the creation of online communities of practice where teachers can discuss pedagogical approaches, teaching strategies and common challenges. OER provide teachers with equitable access to high quality materials for their research and to prepare for teaching, removing financial barriers and promoting resources tailored to specific contexts and needs.

For students, OER offer more equitable access to quality educational materials. By eliminating the financial barriers associated with traditional textbooks and other study materials, students can access the necessary resources without incurring additional costs or engaging in illegal practices such as photocopying. This can be particularly beneficial for students with financial difficulties. Moreover, OER provide access to study materials that

are specially designed for their contexts, culture and educational needs.

From a quality perspective, OER can be continuously reviewed and improved, ensuring content is up-to-date and aligned with the latest research and developments in the field. Teachers and institutions can adapt OER to meet the specific needs of their students and educational contexts.

In terms of innovation, OER provide a platform for pedagogical experimentation. Educators can use different types of content, such as videos, interactive simulations and multimedia resources, to enhance the learning experience. This can motivate students and improve their understanding and retention of concepts.

### ***3.1- Intersection between Open Educational Resources, Open Access and Open Science in Higher Education***

The Open Educational Resources (OER) movement and the Open Access (OA) movement are similar but not the same. OER is used for teaching and learning, while OA aims to make the results of scientific research freely available. Both movements promote the use of open licences (such as Creative Commons) to publish and make content available in repositories.

OER typically include complete courses, lessons, modules, textbooks, tutorials, or any material designed for teaching, while OA publications often include journal articles, case studies, books, theses and research-related materials. However, it is worth clarifying that the **difference**



**between OA and OER is not their content categories but in the goals pursued by the policies that drive them.**

In higher education, the publication, creation and use of Open Access (OA) publications can intersect or overlap with Open Educational Resources (OER) in different ways. Any research available under open licences can assist educators in preparing up-to-date and relevant learning materials. They can be used as recommended or additional reading, or assigned to students to search online for relevant documents to reinforce both information retrieval skills and student-centred courses (Levey, 2023). In turn, many university or HEI Open Access repositories contain all kinds of materials, including collections dedicated to teaching materials.

Some higher education institutions choose to create specialised repositories for OER (outside of OA repositories) with a focus on reuse and adaptation for educational purposes. As such,

publications are treated differently, taking into account the unique characteristics of OER, classifying and describing them in association with the curriculum (for searching by subject, programme or type of OER, for example), or using licences that allow for the creation of derivative works (allowing translations and versioning) or providing editable versions to facilitate material adaptation, among other considerations.

Both OA and OER are part of Open Science, a broader and more comprehensive concept also promoted by UNESCO ([UNESCO Recommendation on Open Science, 2021](#)). Open Science, OA and OER are converging movements and initiatives. The UNESCO Recommendation on OER even includes research materials in the definition of OER. Therefore, it is relevant to design an environment where actions to promote open education and open science converge, enabling universities or HEIs to fulfil their primary functions: teaching, research and outreach.

## OCW (OpenCourseWare): an example of specialised repositories for Higher Education OER

OpenCourseWare repositories contain materials for complete university courses that are openly and freely available (including curricula, video lectures, notes, exercises and assignments). The Massachusetts Institute of Technology (MIT) was the institution that initiated the OCW initiative when, in 2001, it publicly announced it would provide free and open access to its official courses. Since then, several universities worldwide have adopted the OCW format to publish courses.

**Find OCW repositories at:**

[MIT OCW](#)

[KOCW](#) (Korea)

[JOCW](#) (Japan)

[OER Africa OCW](#)

[CCCOER OWC Directory](#)

## **3.2- Integrating OER into the Higher Education Curriculum: The Need for a Context-Based Perspective**

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The adoption and integration of Open Educational Resources (OER) in educational settings presents challenges and opportunities that require an in-depth and context-specific analysis.

The curriculum, as a framework that guides teaching and learning, has been shaped by various tensions, especially between content and pedagogical practice. This tension, rooted in various traditions and theoretical perspectives, becomes relevant when considering the interaction between OER and the curriculum. In this regard, it is necessary to explore how OER relates to the curriculum and reflect on how educational content and practices are intertwined in teaching and learning processes. This analysis highlights how important it is to take the curriculum into consideration in order for OER to be successfully adopted and effectively integrated into educational practice.

To address the challenges posed by the adoption of OER, it is vital to consider the context in which this process unfolds and understand teaching practices. Analysing the curriculum in relation to OER highlights the key aspects influencing the successful implementation of these resources. Elements such as the institutional environment, teaching structure and internal dynamics are crucial to how teachers incorporate and adapt OER, as they can be facilitators or inhibitors. Similarly, external factors, such as cultural, historical and economic considerations, also have an impact on the integration of OER into the curriculum, particularly when it comes to the kind of university and people's views on their mission.

Ultimately, the adoption and integration of OER into the curriculum goes beyond the mere inclusion of open resources in the educational process. Instead, it requires a deep understanding of how these resources interact with teaching practices, curriculum content and the educational environment as a whole. Addressing these aspects comprehensively will allow for more effective and beneficial implementation of OER in education, promoting greater openness and access to knowledge and ensuring access to higher education as a public and social good.

## **3.3- Barriers to Adopting the OER Model in Higher Education**

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It is imperative to highlight that the OER movement has not been spared of challenges regarding its concrete implementation in specific educational environments. These limitations have come to light through stories from teachers who have faced obstacles when incorporating OER into their teaching (Rodés, 2019)<sup>7</sup>.

### **3.3.1- Legal Barriers**

**Copyright and Licencing:** In the process of adopting OER, various barriers affecting their integration into the educational context have been identified. Copyright-related issues are amongst the most prominent barriers, despite not being widely addressed in conventional literature on technology adoption. These barriers include issues linked to cultural aspects, copyright literacy, understanding of the terms of open licences, publishing traditions and modalities, ideological

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7 Rodés, V. (2019). Una Teoría Fundamentada sobre la Adopción de Repositorios y Recursos Educativos Abiertos en universidades latinoamericanas. <https://minerva.usc.es/xmlui/handle/10347/18238>



perspectives and concerns associated with appropriation and commercial use.

Reuse, a common practice in creating educational resources, includes using content not specifically designed for education, material curation and adapting existing resources. A lack of understanding of digital copyright can lead to improper copying practices.

**Incompatibilities between university or institutional intellectual property policies and open licences.** Promoting an OER policy or project within the framework of institutional regulations can be undermined because it is incompatible with the internal rules on intellectual property, often meaning these rules need to be reviewed.

**Mandatory textbook policies:** Some universities have bodies or committees that establish the mandatory use of specific textbooks. More commonly, there are institutional approval processes for textbooks to be used in class. The process to adopt OER must be compatible with these types of rules or policies.

### **3.3.2- Barriers due to Culture and Attitudes**

**Tensions between Open and Traditional Approaches:** When adopting OER, tensions arise between open publishing and traditional practices. Some educators feel uncomfortable or believe it is wrong to use others' work and choose to protect their own resources rather than sharing them. Economic concerns also come into play, with some viewing OER as a new business model and others focusing on altruistic teaching.

**Faculty Willingness to Openness:** Faculty members have expressed a willingness to embrace open content but on conditions such as striking a balance between producers and consumers, recognising authorship and licences that promote equal use. Concerns about unauthorised

changes and commercial use reflect the relationship between authorship and versioning.

**Lack of Digital Skills Amongst Teachers:** Creating and adapting OER requires new skills. Teachers' ability to integrate OER into their teaching practice is influenced by the level of their digital skills and how useful they consider these resources to be to their work.

**Undervaluing Educational Materials Creation:** Barriers also relate to teachers' own perception of their personal abilities. Educational resources developed by teachers themselves may be undervalued compared to other forms of publication. Quality attributes are attributed to resources to make them more valuable, which can influence how much they are shared.

**Valuing Technology more than Pedagogy:** There is a tendency to prioritise the adoption of educational technologies based on their availability and ability to create visually appealing designs rather than their pedagogical value. This approach can be a significant distraction to creating high quality OER and may lead to an overemphasis on technological tools at the expense of pedagogically sound strategies.

**Culture and Institutional Policies:** Institutional context and policies also create barriers. Institutional culture, non-existent or contradictory policies and emerging sharing practices influence the adoption of OER. Considerations about the teaching profession and institutional incentives also play a significant role.

### **3.3.3- Infrastructure, Resources and Incentives**

**Access to Technology and Information Literacy:** Accessibility and exposure to technology are also barriers. Lack of knowledge about repositories, their existence, how they operate and types of

content hosted, as well as limited access to connectivity and technology, constitute limiting factors.

**Excessively Technical Repositories:** The inherent characteristics of technology also contribute to barriers. Repository cataloguing and design systems can be confusing or poorly adapted to user needs, impacting their efficiency.

**Lack of Time for Teachers:** Furthermore, time constraints are recurring obstacle to adopting OER. This is evident because of the time required to acquire skills and competencies related to OER, the perceived usability of repositories and not enough time dedicated to creating and publishing resources due to teachers' multiple responsibilities.

**Lack of Technical Support for Editing, Publishing and Accessibility:** Traditional publishing models rely on multiple rounds of editing and review by specialised personnel. Open materials, despite undergoing peer review processes, are often perceived as low quality due to aesthetic and grammar-related issues.

**Budget Constraints:** Economic factors act as a significant barrier in many universities. Adopting OER involves covering the costs of technology infrastructure, development, content curation, maintenance and improvement, training of trainers and, in general, establishing incentives to create OER (such as funds for innovation, OER grants or sabbaticals for content creation).

### ***3.4- Overcoming the Barriers to Adoption***

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Below are some recommendations for enabling a smoother and more fruitful integration of OER into educational environments, considering both teaching

practices and the overall curriculum landscape (Rodés, 2019):

- 1. Promote Teacher Knowledge of OER:** Foster a deep understanding among teachers of the nature, advantages and challenges of OER. Training sessions, workshops and open discussions can contribute to a greater awareness of how OER can enrich their pedagogical practices.
- 2. Develop Institutional Policies:** Educational institutions should consider creating clear policies and guidelines that support the adoption of OER. This would provide a structured framework for implementation, as well as recognising and rewarding teaching efforts.
- 3. Integrate OER into Curriculum Planning:** Teachers should consider incorporating OER from the outset of curriculum planning. This would involve assessing how OER can complement and enhance existing programme content and activities.
- 4. Encourage Local OER Creation:** Institutions should provide incentives for teachers to create their own OER tailored to the needs and contexts of their students. This would not only promote authenticity but also contribute to the development of a localised and constantly evolving OER ecosystem.
- 5. Foster Collaboration and Sharing:** Create spaces and platforms where teachers can share their OER and experiences. Collaboration among teachers from different disciplines and contexts enriches the diversity of available resources and fosters a sense of community.



6. **Consider Professional Identities:**  
 Recognise that OER adoption is linked to teachers' professional identities. Provide opportunities for educators to reflect on how OER can contribute to their growth and professional development.
7. **Prioritise Accessibility and Diversity:**  
 When selecting or creating OER, it is vital to consider accessibility for students with different abilities and needs. The cultural and linguistic diversity of the region should also be taken into account to ensure inclusive education. For this to be achieved, teachers must be given institutional support or training on basic accessibility topics (such as describing images, contrast and font size, transcriptions for videos) and the free translation of OER into different languages and dialects should be encouraged.
8. **Encourage Research and Impact Evaluation:** Institutions should encourage research on the effectiveness of adopting OER in different contexts. How OER impacts student learning, engagement and performance, allowing for continuous improvement of practices, should also be assessed.
9. **Develop Technology Infrastructure:**  
 Recognise technological limitations that can hinder access to OER. Institutions and public policies should work on improving connectivity and access to devices for all students.
10. **Foster Continuous Reflection:**  
 The adoption of OER should be a process of constant reflection and adaptation. Teachers, communities and institutions should be open to adjusting their approaches based on results and feedback.
11. **Provide Support for Review and Quality Improvement:** The validation and review of created materials is crucial, with an emphasis on design, meeting objectives and an impact on academic performance. Universities or HEI should involve editors, style reviewers and designers in the review process to mitigate perceived barriers related to quality, lack of skills, lack of institutional support and even the time constraints faced by some teachers.
12. **Understand the cost structure of different educational material production models (closed/open)** and promote research that analyses the impact on the cost of educational materials for university students in order to design strategies and institutional policies that ensure access to sources of knowledge.
13. **Identify potential external funders,** either through attracting government funds or international donors.

## 4- OPEN EDUCATION IS A UNION MATTER

In interviews with union leaders from the Global South, we found people made similar statements regarding the emergence of new problems around working conditions due to the boom in digital education driven by the COVID-19 pandemic. They talked about issues such as the impression that the increased use of digital technologies has been a key factor in worsening working conditions due to an increased workload. They also felt there had been an increase in bureaucratic tasks that take away time for creative activities, a lack of proper training to teach and assess in digital environments, a lack of motivation caused by the lack of recognition of teaching activities compared to research, especially in teacher evaluation and also their perception that the teaching profession lacks social value.

The "Final Report of the Fourteenth Joint ILO/UNESCO Expert Meeting on the Application of Recommendations concerning Teaching Personnel" (2021)<sup>8</sup>, raises similar issues to those expressed by the teachers interviewed. It highlights the need to listen to the voices of teachers and their organisations in the face of new challenges regarding the professionalisation of teaching in the 21st century. Furthermore, Education International's 8th World Congress<sup>9</sup> encouraged EI and its affiliates to promote OER policies. It emphasised the need for these policies to be developed with the

"prior consultation of education unions so as to ensure they are in line with national quality standards for teaching and learning, are not subject to commercial imperatives, include a gender and cultural perspective and do not undermine the autonomy and working conditions of teachers and academics, including their right to be properly and fully recognised."

In this context, Open Education is a tool that operates in favour of teachers as autonomous workers and professionals. We have seen how adopting the OER model is not just about licencing open access materials. Adopting this model implies promoting the collaborative dynamics inherent to 21st century education, saving teaching time, giving the teacher back control of teaching, allowing them to freely adapt available materials, rewarding teachers who have a greater aptitude to create content by supporting its publication and showcasing good teaching practices. It is also an efficient way to allocate the budget available for materials, creating a critical mass of affordable and context-adapted resources. However, it is important to note that if a system of incentives or appropriate training are not created, adopting the OER model may be seen as a burden rather than an advantage by teaching staff. Therefore, teacher unions should get involved and be listened to so that an appropriate institutional culture of OER can be established. In this regard, some of the points that could be included in union advocacy platforms are:

- **Recognising teachers as creators of pedagogical knowledge.** Providing incentives for the open publication of materials developed by faculty members, thus promoting

8 Final report: Fourteenth Session of the ILO/UNESCO Committee of Experts on the Application of Recommendations concerning Teaching Personnel (4th-8th October 2021) International Labour Organisation, United Nations Educational, Scientific and Cultural Organisation [https://www.ilo.org/wcmsp5/groups/public/---ed\\_dialogue/---sector/documents/meetingdocument/wcms\\_839720.pdf](https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/meetingdocument/wcms_839720.pdf)

9 [Resolution on: Strengthening Equitable Access to Teaching, Learning and Research Materials](#) (ei-ie.org) The 8th Education International (EI) World Congress meeting in Bangkok, Thailand, from 21st to 26th July 2019



greater access to materials. These incentives could serve as an example to create more:

- Creating competitive funds for material creation or grants to develop OER.
- Providing support mechanisms for style correction, graphic design for materials produced by teachers, including translation services for minority languages or native languages.
- **Special recognition for innovative teachers or those participating in open educational practices (OEP),** by:
  - establishing funds for innovation in higher education practices and prioritising OEP.
  - Implementing peer training mechanisms in OEP and OER.
- **More appreciation of teaching activities and valuing the production of teaching and didactic knowledge alongside research activities.** This could be achieved by including a points system for creating and publishing OER in teaching activity assessments.
- **Promoting decolonisation in higher education:** teacher unions often advocate for more inclusive and representative education that takes into account different voices and historically marginalised perspectives.
  - Part of the agenda could be to encourage the use and creation of OER that contribute to decolonising curricula, practices, and institutional policies.
- **Advocating for a balance between teaching and research activities :** Traditionally, research has been given a higher status than teaching in the academic hierarchy. Teacher unions tend to advocate
  - for a system that values teaching activities as much as research.
  - This would require recalibrating professional evaluation and career progression mechanisms to include the creation and adaptation of OER as a valid and valuable element in teaching activities.
- **Promoting ethical and social values in education :** Some unions already defend values such as social justice, equity and inclusion.
  - These values could be strengthened by advocating for OER that explicitly address these issues in both their content and pedagogical methodology.
  - By incorporating these perspectives, teacher unions not only reaffirm their commitment to more inclusive and equitable education but also highlight the relevance of OER in achieving these goals when considering higher education as a public and social good.

## 5- A CALL TO ACTION<sup>10</sup>

Below is a step-by-step guide with concrete tools to facilitate the promotion of OER by teacher unions.

### ***5.1- Build an OER Culture within the Union***

Building knowledge about the OER model within the union is the first step to addressing OER collectively. To do this, the following is suggested:

- Training and Lifelong Learning: One of the first steps in establishing an OER culture is educating union members about what OER are, their benefits and how they can be used and adapted. Training workshops and online seminars could be effective ways to distribute this knowledge.
- Create Specialised Committees: Creating committees or subcommittees within the union structure focused on promoting and developing OER could be a useful strategy. These committees could work closely with pedagogy and educational technology experts from universities to develop more effective and integrated strategies for promoting the OER model in union programmes and negotiations.
- Interinstitutional Alliances: Unions could seek alliances with educational institutions, NGOs and other organisations interested in promoting OER. These alliances could facilitate the exchange of resources, methodologies and best practices.
- Promote Research and Publication: Promoting research on the effectiveness and impact of OER could provide empirical data to support their adoption. Findings could be published in academic journals and other public forums to increase awareness and support for OER.
- Integrate Decolonisation and Equity: By aligning with broader union agendas, such as decolonising the curriculum and promoting equity in education, OER can become an integral part of the union's mission.
- Communication and Dissemination: A well planned communication strategy can be vital for keeping members informed and engaged. This could include regular newsletters, webinars and using social media platforms to share OER-related successes and challenges.
- Continuous Evaluation and Feedback: Implementing mechanisms to regularly assess the impact of OER initiatives will help ensure necessary adjustments are made and ensure efforts are aligned with organisational and educational objectives.
- Adopt a policy of open publication (using Creative Commons licences) for union publications.

<sup>10</sup> Parts of this paragraph were based on and adapted from the following documents: OER Advocacy Plan (Worksheet), SPARC, published by CC-BY 4.0. Available on: [https://docs.google.com/document/d/1jv\\_0jsunR4r501RXdj6qmOtiT4hjDSyR6X1dT9MnLXM/edit#heading=h.gjdgxs](https://docs.google.com/document/d/1jv_0jsunR4r501RXdj6qmOtiT4hjDSyR6X1dT9MnLXM/edit#heading=h.gjdgxs) Guidelines for developing open educational resource policies UNESCO and the Commonwealth of Learning, 2020, published by CC-BY-SA 3.0. IGO. Available on: <https://unesdoc.unesco.org/ark:/48223/pf0000371129>



- Raise awareness among members about this decision and provide information about the benefits of open publishing and promoting the OER model in higher education.
  - Ensure union members responsible for promoting OER have certain basic competencies, such as digital skills, to effectively promote OER and receive training that can be guaranteed and promoted by union organisations to ensure optimal integration of these resources into the educational environment.
  - Knowing practical examples of OER use and success stories in different contexts to illustrate key points.
  - Understanding the arguments for and against the use of OER.

Arguments and counterarguments about OER are presented, by way of example, in the following table:

<i>Arguments</i>	<i>Counterarguments</i>
The adoption of open science and OER models could restrict academics' options for where and how to publish their work, undermining their academic freedom	On the other hand, open science and OER models may expand, rather than restrict, publishing platforms. Academics can still choose to publish in closed-access books, textbooks and journals but can also deposit preprints or post-prints in open repositories, thus diversifying their dissemination channels.
OER and open science platforms could compromise academic quality and rigor since they are not always subject to the same review as traditional publications.	Peer review and other quality assurance methods can be implemented in open education and science models. Furthermore, transparency and accessibility may invite broader review of work, potentially enhancing its quality through user assessments and feedback-based revisions.
The OER and open science model could create inequality in access to high quality educational resources, as resources from more powerful institutions could overshadow those of institutions with fewer resources.	The underlying philosophy of OER and open science is to democratise access to knowledge. Through open licences and freely accessible repositories, OER have the potential to balance disparities in access to educational resources.
There is a risk that OER and open science may lead to the misuse of academic work, affecting copyright and recognition.	Open licensing systems, such as Creative Commons, offer flexible mechanisms to protect copyright whilst granting access to material and allowing it to be reused.

## 5.2- Understand the Context Fully

The starting point for designing an effective intervention is to collect basic information related to decision-making processes for creating or acquiring educational materials that are within the union's scope of influence.

### 5.2.1- Analyse National or Institutional Policies

The following policies should be carefully reviewed:

- **Institutional intellectual property policies:** These policies determine the ownership of academic production in universities or higher education institutions. They specify who holds the copyright to content funded or created by faculty members under employment or service contracts. It is essential to understand the scope of these policies to integrate them correctly into OER policies.
- **Policies or regulations for teaching staff:** Reviewing these policies will help understand whether the creation of resources is part of their professional profile and what implications this has on remuneration and promotion.
- **Policies for approving textbooks and course materials:** Many universities or HEIs have procedures for approving materials and some have mandatory textbook policies.
- **ICT policies:** Analyse policies related to educational platforms and institutional repositories or other spaces for publishing digital content and establish whether they have open access policies. Find out if there are collections

of OER and how these resources are treated in repositories.

### Key Questions

Do existing regulatory frameworks for content or publications allow open licences to educational materials to be granted and do they allow content created by third parties to be adapted?

Is there a system for approving materials that could be incompatible with OER?

Will it be necessary to advocate for changes to institutional and/or national policies or regulations to promote OER projects in higher education?

In which regulatory framework or institutional policy could an OER policy be established?

### 5.2.2- Gather Evidence

It is necessary to develop a solid evidence base to put together arguments and achieve effective intervention. If information is not readily available, unions should collect their own evidence by conducting or commissioning research on aspects requiring further investigation.

The following actions are suggested:

- **Identify the factors that influence the adoption of OER by university teachers and explore how this is linked to their usual teaching practices.** Investigate the subjective, contextual and institutional elements involved in the use or non-use of repositories and OER by faculty members. Simultaneously, research dominant practices in the creation, publication and sharing of traditional resources by teachers. Also, distinguish the different ways in which university



teachers use institutional and national repositories. Finally, design robust strategies to facilitate greater and better use and reuse of educational resources in the university environment because OER integration is vital to enhance the effectiveness of higher education.

- **Analyse the budget allocated by the university or HEI for the creation or acquisition of materials, as well as the existence and cost of subscriptions to third party educational material platforms.** This information is essential, although it may be difficult to obtain since it is not always systematised. Nevertheless, it is worthwhile making the effort to gather this data as it will be key to understanding the scope of intervention and building cost-effectiveness arguments.
- **Identify open calls for proposals or institutional programmes for funding educational content.** Analyse the criteria and policies of these requests or programmes, assessing whether it is possible to include clauses for open publication. It is also worthwhile establishing whether there are specialised teams of "content-creating teachers" at the institutional level and analysing the publication policies of the materials they create.
- **Check whether the infrastructure needed exists in the university or HEI.** Access to the internet and digital devices for both students and teachers, as well as the existence of institutional repositories or other spaces for publishing, indexing and searching for content, are factors that will determine the characteristics of the intervention.
- **Conduct exploratory interviews** with educational authorities, programme directors, and library staff to:

- Identify specific situations where the supply or access to materials is difficult. For example, degrees with high cost materials, lack of materials in the students' native language, materials that do not fit the context or are poorly adapted to the curriculum, or students with the kind of disability that makes it difficult to access printed text, among others.
  - Understand under what business model different educational materials used by the institution are produced: a profit-based model (the private sector produces and sells them), subsidised model (the government, institution or external donors finance them) or community model (teachers develop resources within a system of incentives) (UNESCO and the Commonwealth of Learning, 2020)<sup>11</sup>.
  - Establish the level of training in OER these players have, detect academic units or institutes that are particularly sensitive OER-related issues and training.
  - Identify the concerns, preconceptions or objections regarding the OER model that these players may have.
- **Conduct a student survey.** Through such surveys, it is possible to gauge students' opinions about the study materials they use, their level of access, their preferences and other data that will later be essential for constructing the framework of arguments in favour of intervention. Additionally, consulting and publicising the needs and opinions of students contributes to building alliances with student organisations.

11 UNESCO and the Commonwealth of Learning "Guidelines on the Development of Open Educational Resources", Paris, UNESCO, 2020. <https://unesdoc.unesco.org/ark:/48223/pf0000371129>

## Key Questions

How do students access study materials? Are there shortcomings that limit access to quality materials for some students? Where are the gaps in the supply of educational materials?

How is the creation of these materials financed? Who creates them? What is the role of the university or HEI in providing access to these materials? Are there content creation programmes? How much does the university or HEI spend on these programmes? Are materials published with open licences?

Do teachers receive training to create or adapt materials? Are there incentives for content creation by faculty members? Is a culture of sharing and collaboration among teachers from different institutions encouraged?

What are the conditions or determining factors that would help university teachers integrate OER into their teaching practices? What strategies will foster effective approaches to enhance the use and reuse of educational resources in the academic context?

How is the effectiveness of learning materials currently assessed? Should changes be introduced to accommodate materials based on OER? Can ICT solutions support this process?

Are there shortcomings regarding technical support and infrastructure that hinder or might hinder the availability, search and adaptation of OER for new purposes?

## Example of a Student Survey

In 2012, the [Latin American Open Textbooks Initiative \(LATIn\)](#) conducted a survey of students from universities in Argentina, Brazil, Chile, Ecuador, and Uruguay (UNR, UCSP, UACH, ESPOL, and UdelaR) on their access needs for study materials. The study revealed that:

- 43% of university students faced obstacles when accessing mandatory texts, with only 11% having full access.
- 60% of students did not acquire any of the recommended textbooks during the year of the survey.
- Libraries are the primary source of access (61%), followed by photocopies of individual chapters (54%) and downloads of books from the internet (51%).

The survey also revealed that access is particularly challenging in countries like Argentina and Uruguay where there are virtually no legal exceptions for educational use, research or libraries, forcing students to navigate in a "grey area" of access that often leads to illegal practices by both teachers and students.



### 5.2.3-Detect Barriers and Opportunities

After gathering all the information, we suggest building a matrix of barriers and opportunities. To create the matrix,

consider including the categories presented in 3.3. on barriers to adopting OER. The results of this exercise will provide essential input for the union to develop an appropriate intervention.

**Matrix 1: Examples of Barriers and Opportunities**

<i>Barriers</i>	<i>Opportunities</i>
University policies incompatible with open licences.	Develop copyright literacy workshops; Promote the transformation of institutional policies towards open licensing.
Limited access to technology and knowledge about repositories.	Establish partnerships with educational institutions and technology organisations to develop robust, sovereign and accessible technological infrastructure that ensures reliable connectivity and equitable access to technology; Promote the creation and/or improvement of institutional repositories to include OER collections.
Perception that educational resources created by teachers are not as good quality as those published by more established or commercially available entities.	Work with educational institutions to create platforms and policies where teachers can be recognised for their contributions to OER creation; Create inter-institutional networks that allow teachers to collaborate on educational materials development projects, sharing experiences and best practices and one day recognising and celebrating innovations in this field through awards and distinctions; Include collaborations with open-licence publishers and external organisations, establishing wider distribution channels for educational materials created by teachers and ensuring these resources reach a wider audience which, in turn, could contribute to a greater appreciation and recognition of the quality and relevance of these materials in the educational environment.
Perception by faculty members that the development of OER constitutes an unnecessary workload.	Organise workshops on OER literacy; Create incentives for OER creation, such as OER contests or awards for excellence in OER, specific funds for OER creation

## 5.3- Draw up a Plan

Create a roadmap and ensure it is disseminated among union members and that it is validated. Below is a basic structure for this roadmap:

### 5.3.1- Objectives

After understanding the context, the union will be able to : identify the problems which must be solved as a priority, determine the scale of the intervention (national, federal, institutional or a pilot project) and set objectives in line with the scope of its sphere of influence.

Write concise objectives, ensuring they are specific, measurable, achievable, relevant and time-bound. Check the barriers and opportunities matrix (section 4.2.3) you developed in order to help you draft them.

Bear in mind that adopting the OER model at the institutional level, and even more so at the federal or national level, is a complex and probably a long-term task depending on the context. In some cases, the conditions may not be in place to build government or institutional policies that address all aspects of the OER model but that does not mean that no action is possible. Every step towards opening content up and changing institutional culture is important.

## Possible Objectives

- Establish partnerships and interinstitutional dialogue with governments, institutions, multilateral organisations and NGOs to promote the development of OER policies in higher education institutions.
- Incorporate clauses on OER and CC licences into the terms and conditions of educational material creation support programmes funded by universities or HEIs.
- Establish a programme of incentives for the publication of OER adapted by teachers that is in line with the curriculum through grants or funds for OER development.
- Include OER creation and publication as a positive and expected element in the evaluation criteria for teaching activities.
- Launch a programme to translate and contextualise OER into local languages.
- Establish a sabbatical programme for teachers to create OER adapted to the curriculum and publish them in their university or HEI's repository.
- Have an impact on the policies of institutional repositories of universities or HEIs by creating OER collections where they do not exist.
- Present a pilot project that addresses specific or urgent needs to access educational materials through the development of OER (as was the case in many contexts during the COVID-19 crisis).
- Co-create a national or institutional OER policy in collaboration with government or institutional education authorities.



### 5.3.2- Key Players and Possible Allies

Here is a list of

- Key players ; who you will probably have to try and influence.
- Possible allies ; who will assist you in persuading or influencing.

<i>Key Players on the domestic stage:</i>	<i>Key players on the international stage:</i>	<i>Possible Allies:</i>
<ul style="list-style-type: none"> <li>▪ Policy makers (policy advisors, policy directors, ministers, etc.).</li> <li>▪ Unions and student organisations, Education International and other relevant union organisations.</li> <li>▪ Members of parliament (specialised in education and ICT).</li> <li>▪ Content providers, publishers.</li> <li>▪ Central bodies responsible for the education system (e.g. those in charge of funding and quality assurance).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Institutional authorities</li> <li>▪ Unions and student organisations.</li> <li>▪ Library staff.</li> <li>▪ University press staff.</li> <li>▪ Directors of Institutional Repositories.</li> <li>▪ Units or departments involved in decision-making processes related to the creation or acquisition of educational materials.</li> <li>▪ Units or departments specialised in the design and implementation of ICT programmes in education, as well as in teacher training in educational technology.</li> <li>▪ IT support units.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Education International and member organisations with experience in Open Education.</li> <li>▪ Researchers who are experts on Open Education at the national level.</li> <li>▪ Library staff with expertise in Open Access.</li> <li>▪ Local Creative Commons chapters.</li> <li>▪ UNESCO Chairs (national) in Open Education, Distance Learning, Hybrid Education, Higher Education or other relevant fields.</li> <li>▪ International OER organisations.</li> <li>▪ UNESCO, Education and ICT sectors, Dynamic Coalition on OER.</li> </ul>

During this stage, you should::

- Select the **key players or decision-makers** who have the power to advance the union's OER proposal. Write down who they are and why the union's OER proposal might be important to them.
- Get in touch with **possible allies** to gauge their interest and capacity to participate in the union's proposal. Sound out what their involvement might be (support for campaigns, technical advice, political support, etc.).
- Take into consideration previously collected information on **concerns, preconceptions or objections to the OER model**, as well as, reasons behind adopting the OER model from interviews carried out with teachers or authorities.

Once you have established who the key players are, you will need to understand how much they know about open licences

and OER. This information will be used to decide on possible campaigns or training activities.

### 5.3.3- Strategy

Establish which approach to take so as to ensure decision-makers support the union's proposal. Strategies could include:

- Launching joint campaigns and activities with student unions to garner support for the OER project from the university community or society as a whole.
- Actively involve well-known academics and university leaders to persuade decision-makers.
- Include promoting the OER model on the collective bargaining and social dialogue agenda.
- Present OER initiatives or policies during the Open Government roundtables

## Example of Strategy 1:

### Open Government Commitments on OER

The [75 countries and 104 local governments](#) that make up the Open Government Partnership (OGP) provide opportunities for various civil society, academia and government players to submit proposals to their governments, which will then be transformed into government commitments.

In recent years, various commitments to promote OER policies and projects have been made in Brazil, Chile, the United States, Spain, Greece, Slovenia and Romania through [proposals submitted by different stakeholders in Open Government roundtables](#).



## Example of Strategy 2

### OER in Collective Bargaining

Canadian teacher unions have successfully included OER policies and initiatives through collective agreements.

In the [Collective Agreement signed by the Vancouver Community College Faculty Association](#) (VCCFA) with the university, the creation of the "Innovation and Service Enhancement Fund" was negotiated. Among the initiatives to be financed by this fund is the development, adaptation, adoption of OER and awareness raising about them as well as open textbook materials to enrich the curriculum (clause 6 of the Agreement).

In the [Collective Agreement signed by the Grant MacEwan University Faculty Association](#) with the university, it was agreed that contributions to teaching and learning, including the development of open educational resources, would be considered as evidence used to determine "the extent of their probationary period, tenure or promotion" within the framework of the "Evaluation of Academic Activities" for teachers (clause 11.6.5.6 of the Agreement).

### 5.3.4- Activities

Define the activities that will be needed to achieve the objectives. Associate them with each objective.

Establish which resources you will need to carry out the activities. Keep in mind that you may need to secure funding to implement the proposal.

Matrix 2: Activities and Resources

Objectives	Activities	Resources Needed
1	1.a 1.b 1.c	
2	2.a 2.b.	
3	3.a 3.b	

Develop a timeline of activities, establish the phases of the proposal and the order of activities in the short, medium or long term.

**Matrix 3: Activity Timeline**

<i>Activity</i>	<i>Week/ Month</i>					

### 5.3.5- Communication Plan

#### **Audiences:**

Define the different audiences at which the union will direct its campaign. Examples:

Students Education authorities Families of students	Faculty Library staff General public
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#### **Framework**

Develop a framework that helps persuade decision-makers and stakeholders (faculty, students, families, etc.). Use the information you have gathered on context to **support these arguments with**

**context-based data.** Remember that different audiences may have different frameworks. For example, teachers may be more interested in the didactic aspects of OER, while students may focus on reducing costs.



## Examples of arguments:

"Textbooks, and higher education in general, are expensive and therefore prohibitive."

"Educational resources funded with public money should be made available for use by any citizen."

"University teachers already create different types of materials; we should give them incentives to share them."

"Technology gives us the ability to address access to educational materials if accompanied by the right policies."

### Prepare to defend your arguments

[Debunking myths about OER](#) (SPARC, USA)

[Debunking myths about OER](#) (European Open Edu Project)

### Message

The message is the argument that will be presented to an audience so they commit to taking action. Ideally, you should have three versions: a full message (1 page), an elevator pitch (1 paragraph) and a slogan (1 sentence). It's best to start with your elevator pitch and work from there. A typical message structure includes four sections

**Hook:** An evocative statement or image that draws the audience in.

**Problem:** What doesn't work in terms of accessing and producing quality study materials? Consider the framework you have developed.

**Solution:** The union's vision and how OER can help achieve it.

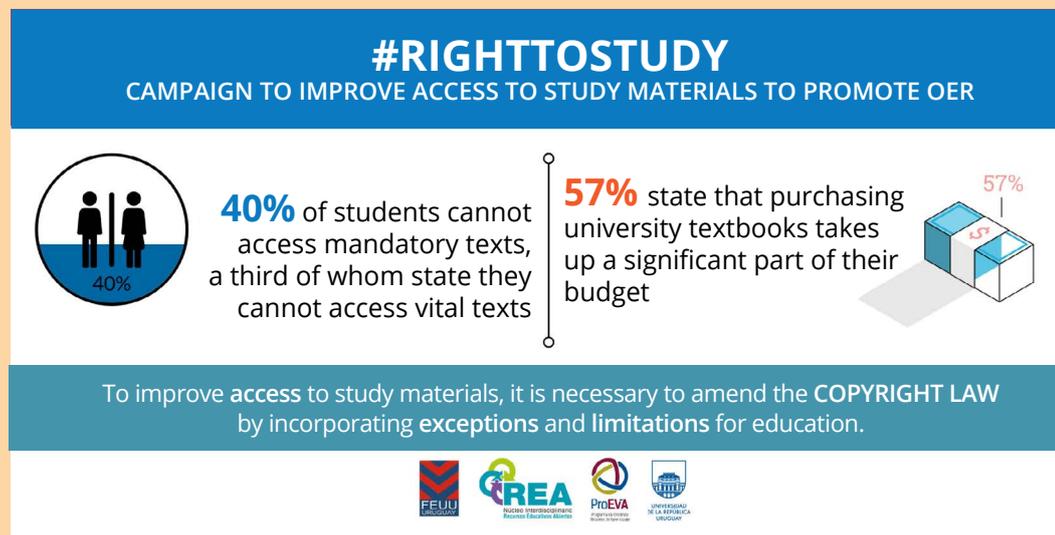
**Call to Action:** How your audience can support the union in solving the problem.

## Make the most of Social Media and the Media:

Use social media and the media to shape public opinion.

- Write press releases whenever you organise an activity.
- Create infographics with data that support the union's proposal.
- Identify journalists, in addition to education experts, and invite them to your activities/events.
- Catch people's attention by highlighting new developments, interesting data or compelling testimonials.

**An Example:** [A campaign to improve access to study materials and promote OER launched by the Federation of University Students of Uruguay \(FEUU\) with the support of the Virtual Environments Programme and the OER Hub at UdelaR.](#)



### The Role of Education and/or Awareness raising in Promoting OER

It is possible that education policy administrators and even teaching staff may not fully grasp the inherent opportunities of OER. Therefore, it is essential to complement the union's proposed campaigns and promotional materials with workshops or training courses.

Consider seeking support from your OER expert allies to design campaigns, awareness-raising materials and coordinate one or more introductory workshops or courses about the characteristics of OER, licences, their features and their use.

## Participate in Open Education Week:



[Open Education Week](#) takes place every March and provides an annual platform to showcase what is happening in Open Education. It is an opportunity to engage colleagues, students, policymakers and others in open education activities and events.

Involve the union in Open Education Week activities, use this opportunity to organise events, present progress on union OER projects, launch courses or awareness-raising campaigns on OER adoption.

You can use the [promotional kit](#) provided by OE Global to tailor the union's event or campaign using official OEWeek graphics and publish it on the OEWeek website.

## Bonus Track - Examples of OER Policies

The 2012 Paris Declaration on Open Educational Resources urges governments to promote the use of OER and calls for publicly funded materials to be published in a format that can be reused. It particularly encourages the development of policies for the production and use of open educational resources.

Increasingly, institutions and governments have adopted Open Education policies facilitated by the 2012 Paris Declaration and the UNESCO OER Recommendations of 2019. These are formal regulations related to the support, funding, adoption and use of open educational content and/or open education practices. Such policies can take various forms, including national, provincial or state government legislation, institutional policies and guidelines, and mandates from national or international funders. Let us look at some examples:

Below are examples of OER policies or regulations related to higher education that will help you understand the options that unions can promote in their advocacy context.

### Inter-American Development Bank (IDB):

**Type:** Institutional mandate of a funding organisation

**Scope:** IDB-funded projects and materials published by IDB

Since 2015, the Inter-American Development Bank has been publishing all its materials under CC licences. When financing educational projects (or others), it includes a condition in its funding calls for the publication of results in open formats.



## Canadá

**Type:** Government policy on OER

**Scope:** Higher Education in the province of British Columbia, Canada

In 2012, following the Paris Declaration on OER, the [Council of Ministers of Education, Canada](#) (CMEC) decided to fund a programme in the province of British Columbia called [BC Open Textbook](#). This is a programme for open textbooks in higher education in line with the subjects for which there is the highest level of enrolment in the province. [BC Campus](#), an organisation was commissioned to develop these resources. Today, the programme offers not only open textbooks but guides and a platform to facilitate adaptation and remixing of textbooks by faculty members.

## Brazil

**Type:** Government regulation on OER

**Scope:** Higher Education Institutions and public bodies funding remote learning materials

[Resolution No. 1 \(March 2016\) of the National Council of Education](#) of the Ministry of Education of Brazil establishes national guidelines and standards for the provision of Higher Education Distance Programmes and Courses. It Article 2 (§ 4) states that :

*“Higher education institutions, as well as direct and indirect public administration bodies and agencies that finance or promote remote learning in higher education, must ensure the creation, availability or use and management of open educational resources, through open licences, that facilitate use, review, translation, adaptation, recombination, distribution, and free sharing by every citizen, safeguarding copyright.”*

The Brazilian government also [established the use of Creative Commons Licences](#) for all public tenders for the [National Book Programme](#).

## Fiji

**Type:** Institutional Policy

**Scope:** University of the South Pacific

In 2017, the University of the South Pacific adopted a [Policy on Open Educational Resources](#). The policy established that open licences should be used by default for academic output.

*"Point 3.2. Copyright and Licences: (...)*

*(b) Teaching and learning resources developed by university staff will be shared using an appropriate open licence to enable reuse, revision, remixing, and redistribution by others."*  
(...)

*(d) The university will adopt the most current Creative Commons licences for its open licences. A detailed guide on open licences will be made available to assist and determine how staff wish to share their teaching and learning resources.*

*(e) The university reserves the right not to share resources that may be commercially viable.*

## Netherlands

**Type:** Institutional Policy

**Scope:** Delft University of Technology

In its [2018-2024 Strategic Framework](#), the university incorporates OER into its educational policy by :

- *providing structural support to faculty and students in using open educational resources*
- *promoting the publication of educational materials under open licences by faculty*
- *integrating open education into the teacher qualification programme and course evaluation criteria.*
- *replacing commercial textbooks with open resources in undergraduate programmes whenever possible.*



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Education  
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Toolkit



## Toolkit on Open Educational Materials for Higher Education Unions



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