

Final Report (draft version)

ICDE Global Task Force on Open Educational Resources (OER)

(October 2008)

Composed by Fred Mulder(TF Chair) and Jos Rikers(TF Support)

0 Introduction

In 2001 the Massachusetts Institute of Technology (MIT) launched its Open Courseware initiative. Since then the now called “**Open Educational Resources**” (OER) movement is spreading around the world. In the arena of **open, flexible and distance learning** several significant initiatives have been undertaken, for example in Europe: Open Learn by the Open University in the UK, Open ER by the Open Universiteit Nederland (OUNL), and MORIL (Multilingual Open Resources for Independent Learning) by the EADTU (European Association of Distance Teaching Universities) and its members. Organizations like UNESCO have taken an interest in this development from the moment it started. There is a Particular relevance of OER for developing countries. OER combine with open, flexible and Distance learning can even be of more value in contributing to **easier and better access to education**.

Recognizing the importance of this movement, and based upon discussions between ICDE (International Council for Open and Distance Education) and UNESCO at the ICDE SCOP Meeting in Lillehammer in June 2006, ICDE decided to establish an **ICDE Global Task Force on Open Educational Resources**, involving members from different continents, cultures and educational approaches. This new Task Force (TF) was announced during the 22nd ICDE World Conference invited the TF to hold its **kick-off meeting at UNESCO’s Headquarters** in Paris in November 2006.

The ICDE SCOP Meeting hosted in June 2007 by OUNL in Heerlen was fully devoted to OER with the theme ‘Open Educational Resources as an instrument for achieving Education for ALL’. This SCOP Meeting was instrumental to advance the work of the TF on The basis of its Interim Report presented to SCOP 2007 by the TF Chair, and to further Develop the thinking among SCOP participants on OER as an innovative and challenging Concept as well as on OER strategies and implementation scenarios. The TF had a meeting Next to the SCOP Meeting in Heerlen, marking the major conclusions and recommendations of the SCOP Meeting and agreeing on how to proceed. The TF has finished its work by delivering its Final Report to the ICDE SCOP Meeting hosted by Shanghai TV University in October 2008 and by having this report accepted by ICDE.

This Final Report has the following chapters:

1. Scope and composition of the TF
2. Results of an Inquiry regarding OER among the ICDE membership
3. Outcomes of the 2006 kick-off meeting of the TF at UNESCO’s Headquarters in Paris
4. A series of ICDE flavored review notions of the OECD Report on OER
5. Outcomes of the 2007 ICDE SCOP Meeting at OUNL
6. Further developments after ICDE SCOP 2007
7. Conclusions & Recommendations
8. Epilogue: does India show the way?

1 Scope and composition of the Task Force

The ICDE Global Task Force on OER is-through its members-connected to several world regions, links to other initiatives on OER, and includes a representation from UNESCO.

The TF has the following members:

- ✓ Fred Mulder (Chair), Rector, Open Universiteit Nederland, The Netherlands
(also Chair PC 2007 ICDE SCOP Meeting-Heerlen/NL, Chair PC 2009 ICDE/EADTU World Conference-Maastricht/NL, and Chair EADTU OER/MORIL Task Force)
- ✓Nick Allen, Provost, University of Maryland University College, USA
- ✓Susan D'Antoni, Programme Specialist, IIEP, UNESCO
- ✓Stuart Hamilton, CEO, Open Universities Australia, Australia
- ✓Helmut Hoyer, Rector, FernUniversität in Hagen, Germany
(also acting ICDE President until the end of 2007)
- ✓Sally Johnstone, Vice President Academic Affairs, Winona State University, USA
- ✓Fredric M. Litto, President of ABED, Brazil
(also member ICDE Executive Committee as of January 2008)
- ✓Bernard Loing, ICDE Permanent Delegate to UNESCO, France
- ✓Frits Pannekoek, President, Athabasca University, Canada
(also ICDE President as of January 2008)
- ✓ Paulina Pannen, Director, SEAMEO Regional Open Learning Centre (SEAMEO SEAMOLEC), Indonesia
- ✓Barney Pityana, Vice Chancellor, University of South Africa, South Africa
(also member ICDE Executive Committee as of January 2008, former ACDE President)
- ✓Reidar Roll, Secretary General, ICDE
(until Spring 2007)
- ✓Tarek Shawki, Chief of Section Information Society and ICT in Education, Science and Culture, UNESCO
- ✓Atwi Suparman, Rector, Universitas Terbuka, Indonesia
- ✓David Vincent, Pro Vice-Chancellor, Strategy Planning and External Affairs, The Open University, UK (also EADTU President).

Furthermore the TF is supported by:

- ✓ Jos Rikers, Senior Officer International Relations, OUNL
(also Chair Organization Committees of the 2007 ICDE SCOP Meeting - Heerlen/NL and Of the 2009 ICDE/EADTU World Conference - Maastricht/NL)
- ✓Ana Perona, Assistant Secretary-General, ICDE Secretariat (part of 2007: Acting SG)
- ✓Nina Bagley, Chief of Information and Membership Services, ICDE Secretariat.

The mandate of the Task Force is to develop a report on Open Educational Resources. This report is aiming to contributing to the global movement of OER, adding specific 'ICDE' flavour and value by adopting the self-and-distance-learning perspective rather than the current mainstream content-in-classroom perspective.

The report will deal, among others, with:

- ☐ Availability/access
- ☐ Intellectual property rights
- ☐ Internationalization versus Localization of content (regarding language and culture)
- ☐ Learning communities support
- ☐ Quality control
- ☐ Financing and sustainable business models
- ☐ Interfacing with regular degree studies
- ☐ Possibilities to bridge between informal, non-formal and formal learning
- ☐ Diversity in target groups
- ☐ Experiences/good practice with existing offers, various options, misuse, benefits to offering institutions
- ☐ Potentials for developing countries from using OER
- ☐ Changing roles of the Public and Private sectors
- ☐ Other issues considered relevant by the group.

The TF will aim at producing a report that will serve, among others:

- to Higher Education / Open and Distance Learning institutions in their decision on introducing (or not) OER activities as a provider or as a recipient
- as a promotional basis for the OER concept
- as a guideline for interested stakeholders
- to ICDE to define its own strategy in this field, including a proposal for an action programme for collaboration among its membership
- to contribute to the OER global movement from the perspective of independent(or autonomous) learning in a distance learning setting rather than teacher dependent learning in a face-to-face setting
- as a paper for presentation, consideration and discussion at the 2007 ICDE SCOP Meeting

2 Inquiry regarding OER among the ICDE membership

In the middle of October 2006 the ICDE members received an Inquiry on OER¹.

The purpose was to get an overview on the issues at stake and the level of involvement of the ICDE membership in this movement.

A fair number of ICDE members (17%) from different world regions responded to the inquiry.

The results showed that OER is a very actual theme for many institutions around the world.

To the question about their knowledge on the OER movement, 68% was definitely Acquainted with the movement, while 32% was not too familiar with it.

To the question on the institution's involvement or planning to becoming involved in a Project on OER, 60% was positive while 40% was negative. Those involved in projects have also described them, and provided links to the relevant websites.

The major opportunities which one sees that OER could bring to open, flexible and distance learning institutions, can be summarized as follows:

- ☐ Easy access to quality content, reaching a wider audience
- ☐ Cost effectiveness: it can help distance learning providers to be more cost effective in

- developing its learning materials and support
- ☐ Greater volume of learning resources available to all
- ☐ Quality learning materials can be obtained by nations and institutions with scarce financial resources to help solve capacity problems
- ☐ Flexibility: greater variety and diversity of learning resources will create more flexible learning opportunities
- ☐ Opportunities for sharing of available resources, increase opportunities for partnerships, for instance through a “Share-alike” protective clause in a Creative Commons licence.

The following major threats that OER could represent for open, flexible and distance learning institutions, have been mentioned:

- Copyrights, Intellectual Property Rights issues: there is a potential for copyright infringement of restricted works by OER authors
- Quality: OER without appropriate review processes can lead to low quality materials
- Cultural domination / Globalization: there is a potential risk for increasing the digital divide
- Lack of a viable new business model that may replace the old one
- Well known “brand” institutions may attract even more students
- “Not invented here” syndrome, academic preference to use their own materials
- Lack of initiative: less scope for research and innovations and uniform prescription of materials, less incentive to produce knowledge
- Content is not the same as learning materials.

Finally, 92% of those who answered the inquiry responded positive to the question about their interest in participating in ICDE activities in this topic.

Further information about the inquiry results can be obtained from the ICDE Secretariat.

3 Outcomes of the 2006 kick-off meeting of the Task Force at UNESCO’s Headquarters in Paris

With UNESCO (Dr. Abdul Kahn) as host the kick-off meeting of the Task Force on November 12-13 in Paris proved to be a fruitful and necessary first interactive exercise around OER.

Important input was given by all members of the TF.

More specifically there were three presentations, by:

- ✓ Fred Mulder (OUNL,TF Chair), ‘Bringing a global movement on OER in a new learner centered mode’
- ✓ Jan Hylen (OECD), ‘An overview of most important issues related to the further development of OER’
- ✓ Jos Rikers (OUNL,TF support), ‘ICDE TF OER Inquiry results’.

These presentations are accessible through the ICDE Secretariat, as is the case with a rather extensive report on the meeting.

Here we only present the ten major highlights from the discussions...

(1)The main message was that the OER movement should focus more on the Independent learner, on top of the ‘traditional’ emphasis on the distribution of digital classroom content. This implies:

- ☐ ‘Open’ is meant to contribute to better and easier access
- ☐ ‘Educational’ is to be read as directed towards leaning and in a student-centred

Approach

- ☐ 'Resources' is to be interpreted in a broad sense, and not only to support teachers but also to support learners.

This is a perspective that typically can be achieved by the ICDE membership and can be facilitated by ICDE in collaboration with UNESCO.

(2) In order to underline this somewhat other paradigm we might want to use the term Open Learning Resources (OLR) rather than OER. Furthermore it was raised that the OER definition is too vague. Does it refer to a course, an object, large pieces or small pieces? What degree of granularity is intended? Is it meant for teachers, or learners, or both? However, it was a rather general feeling that we should work with a concept that stays as broad and general as possible, keeping the word 'Education'. What MIT offers is mainly content, not learning materials. This TF needs to develop the ICDE touch.

(3) 'Open' does not necessarily mean 'free'. MIT puts the content online, but the learning experience is not free, neither the pedagogy. Materials can be free on the web, but he added value through services cannot. Where do we draw the line?

'Open' and 'free' are different concepts. The barriers must be low, OER must be easy to find, attractive, to provide people with easy access to get them into Higher Education. The concept is new: we do not know how this will develop.

(4) The concept is too abstract: what is the position of a given teacher or student in a given country, we need a bottom-up approach, more than a top-down approach.

Developing countries do not want to see themselves only as users, but as producers of Materials as well.

(5) Some findings and preliminary conclusions of the OECD study, lead by Jan Hylen, on the map and scope of the OER movement:

- ☐ it is a global movement
- ☐ there is a growing number of initiatives and resources, but accurate figures are lacking
- ☐ there is a growing number of users, mainly in the categories of post-secondary instructors, students and the general public
- ☐ user data are poor, because of the easy access, most providers have no registration.

A basic observation is that there is a growing competition among Higher Education Institutions for funding and for students. Some institutions give the content away, others are keeping it tighter, what are the implications?

(6) With MIT, Tufts, and Johns Hopkins as sources, the OECD study gives the following characterization of the use and the users of OER:

- ☐ well-educated (bachelors or masters) self-learners, from North America
- ☐ often use it as supplement or complement for its flexibility and quality
- ☐ primarily in small chunks of learning.

(7) According to the OECD study the following motives may hold for institutions:

- ☐ altruistic reasons
- ☐ leverage on taxpayer money by allowing free sharing and reuse between institutions
- ☐ "you give it away and you receive it back improved"
- ☐ good PR show window that attracts students

- ☐ with the growing competition new, attractive and distinguishing models are needed
- ☐ stimulation of internal improvement, innovation and reuse.

Motives for individuals can be:

- altruistic reasons
- desire to stimulate innovation
- a wish to share with therefore creative and educational purposes
- publicity or reputation
- likely the open source movement in software (boost own ego).

(8) The OECD study refers to the following main challenges:

- ☐ Quality and relevance of resources
- ☐ IPR, copyright and licensing
- ☐ Sustainability
- ☐ Goals
- ☐ Organization: size, structure, degree
- ☐ Type of resources and media format for sharing.

As possible revenue models the OECD study mentions:

- Replacement models: OER replaces other costs (has a natural limit)
- Foundation-donation models (for starting up)
- Segmentation models ,offering added value services to user segments
- Conversion models (commercial mode):give away a part, build the market and convert consumer to paying customer
- Voluntary support membership model
- Contributors-pay-model: contributors pay the costs, the provider makes it available for free.

(9) The OECD study identifies as technical issues:

- ☐ open source software and standards
- ☐ metadata harvesting
- ☐ security, privacy, long term presentation
- ☐ individual faculty and students using free services outside the university network
- ☐ who owns the information? what if a company that runs it, starts charging?
- ☐ Long term preservation of information and research data.

Moreover, the OECD study also addresses the question:

“What is new with OER?”

- Way of grass root involvement as producers and users
- Strength of allowing a multiple motivational system: altruistic and economic driven
- Open-up for new business models
- Brings web 2.0 to education
- technological developments challenge HE institutions
- New wine in old bottles:”is it a way to hype up e-learning again?”

(10) Some comments on the OECD study ...

- ☐ There is a problem of lack of stimuli and incentives: what do I get back? Without a reward system academics will not be willing to collaborate. In many developing countries teachers have a source of income when preparing students, we need a business model that convinces people to give away their materials.
- ☐ There was no mention of the language issue! There is cultural hegemony. English is too dominant. We must pay attention to cultural models of learning, and academic cultures. Barrier-free and open differs among the different cultural contexts.

- ❑ An Information literacy course would be essential in order to be able to discern and evaluate the quality of the materials available.
- ❑ A crucial issue is to motivate key decision-makers to make materials available. Only 1% of a university budget spent on open access press would be hugely transformative.
- ❑ The Task Force should identify how a free system can be designed or built to hold the reference systems or templates together. How the systems can talk to each other. Now portal and repositories do not talk to each other. There are many access questions.
- ❑ The format of delivery of OER is very important, bandwidth / access to technology issues, how to deliver in a particular context varies.
- ❑ What is the specific ICDE flavour: what will be the branding, uniqueness of ICDE in OER? Maybe not to be addressed to individual learners alone. It might be institutional capacity building, or a learner-centred approach from an institutional point of view.

In Annex I you may find six additional observations from the Task Force kick-off meeting regarding:

- UNESCO's collaboration with companies like Microsoft and Apple
- The popular use of SMS mobile technology in Asia
- a Canadian initiative at Athabasca University to establish an Open Access press for the creation of content that can be put on I-pods
- the new Open University of Brazil which is trying to establish an all-Portuguese language virtual community
- UNESCO-IIEP which has built a community to support awareness internationally
- Contradictory movements, for example caused by the US Patriot Act.

IN SUMMARY

Regarding the Mandate of the TF...

- A. We should not address all kinds of general OER issues (that is being done by many others already), but rather concentrate on the self-study and learner-centred approach in OER materials, in other words the ICDE flavour in OER.
- B. We can lend from a variety of rich sources: UNESCO, Hewlett Foundation, OECD, Open Courseware Consortium, EADTU, ...
- C. There is a need for a fundamental reflection of the OER definition within the context of the open and flexible learning model as applied – although in some variety – throughout the ICDE membership.
- D. An extremely important issue is the business model, as is the cultural, linguistic, political and economic diversity.
- E. We underline the primary question: “How can OER contribute to respond to the ‘Education for all’ UNESCO policy, capacity building, widening participation and access?”(emphasizing the developing countries context).
- F. And the secondary question: “What role can be attributed to OER in developing or strengthening a knowledge-based society?”(emphasizing the developed countries context).

4 ICDE flavoured review notions of the OECD OER Report

The OECD study referred to in the previous Chapter resulted in a report which in its final draft version was sent to the Task Force members for reflection from a specific ICDE point of view. The review notions that we have received have been collected in **Annex II** in a compact presentation, ordered according to the chapters that were reviewed².

Note that after having sent the draft OECD OER Report to the TF members for reflection, the report was published in its definite form (on May 22) by the OECD under the title: ‘**Giving Knowledge for Free: the Emergence of Open Educational Resources**’.³

The reviewers agree in their opinion that the OECD OER Report shows excellence. It is a **very relevant and readable report**, that is to be recommended to all who are active in the OER area as well as to those who wish to get a better insight into the OER concept and the global OER movement. It has the characteristics of an overviewing report on the one hand and giving direction on how to tackle some of the major OER issues in an appropriate pragmatic way on the other hand. That indeed makes it attractive and very valuable for all OER interested individuals, organizations and governments around the world.

Nevertheless the TF has generated a series of notions and comments as well, supportive, questioning, or critical. The most relevant ones are summarized below, one-to-one matching the order in Annex II, which contains more detail.

IN SUMMARY

the most relevant review notions are...

A. Besides the four forces for change with high impact on Higher Education (HE) that are mentioned: globalization, demography, governance and technology we might identify an important fifth force for change, a fifth challenge in HE, that is the need for substantial upscaling the total population in HE. The present mainstream campus-based HE cannot cope with such (large) demands. OER and the model of open and flexible learning offer relevant solutions in this respect.

B. LifeLong Learning does not receive much attention. The natural bridging between informal, non-formal and formal learning by OER and the paramount opportunities this offers to widening and increasing participation in HE, however, make OER probably a most powerful instrument in the area of LifeLong Learning (LLL).

C. Public funding is being referred to in the report. Thinking of knowledge as a public good, indeed giving it for free, and the supposed responsibility of governments for access, quality and efficiency of HE (and education in general), would justify a ‘good’ debate on the funding role of governments.

D. In the LLL perspective the freely available content on the Internet should empower learners to really study on their own in an open and flexible learning environment, with no (avoidable) references to a teacher, a classroom or an educational institution. This requires structural and explicit learner-centred content design instead of the conventional teacher-centred content approach.

E. One might question whether for Openness the ‘no cost’ attribute is most fundamental, or that it actually is a complex of mechanisms that away all kinds of traditional existing barriers: institutional registration, required diplomas / certificates, on-campus classes and face-to-face meetings, fixed schedules, rigid

Pacing, over-specified programmes, too big programme components, etcetera. Here actually the characteristic Openness of the Open and Distance Learning (ODL) Universities is at stake: in its broadest interpretation open as to access, places, scheduling, pacing, and combining courses, as

well as open to people , methods and ideas, Linking this Openness with OER, could make ODL Universities important players in the OER movement.

F. Many OER users seem to be well-educated learners. This is not surprising since the OER materials generally are not designed for self-study and that's why a high level of education is required in order to be able to learn without additional guidance or support. This means that the potential of OER is heavily underexploited. The report refers to the three European OER initiatives from ODL Universities mentioned earlier (UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL).⁴ These OER activities can be considered as a new generation ('second wave') in the OER development, since their learning materials are explicitly designed for self-study. This significantly lowers the barriers to self-learners as compared to providing classroom learning materials. If we take UNESCO's goal 'Education for All' seriously, this is extremely important, also in connection with the earlier remarks on up scaling, LLL and informal learning.

G. Open courseware should take into account the IP and copyright heritage of other cultures, particularly China. It should be realized that open courseware could be a one-sided exercise. If there are more 'takers' than 'contributors' to open courseware will the world be richer? If Euro-American centric institutions dominate the contributions – as is likely – what will be the international outcome?

H. The ultimate openness of OER leads to a large flexibility in the process of continuous and interactive development and implementation anywhere, anytime, by anybody. The OER contributors share the willingness to devote their time to work on OER activities, and enjoy the input and feedback from others wherever and whenever. However, once the euphoria of being an OER developer subsides, maintaining the OER materials updated at high quality might be very difficult.

I. The report fails to provide concrete sound economic models for OER. HE institutions do have various options, however, to possibly find considerable revenues, not from their content, but rather from credentialing, from examination processes, and from personal support to learners.

J. In regions and areas where ICT possibilities are scarce there is a danger that 'the (prospective) users are left behind'. So, a prerequisite for a successful OER movement is easier and better access to ICT facilities, which implies that should have a high priority in any OER action plan.

K. In many countries, where English is not widely spoken, it will be close to impossible to effectively join the international OER community. A way-out is OER initiatives in different (working) languages. This practice is encouraging and necessary. Nevertheless, what remains is the language barrier to a full sharing of experiences and lessons learned with colleagues from different parts of the world.

L. Generally translating is not enough since the conversion of the learning materials should also include adaptation to a different social-cultural context. For this so-called 'localization' process automation is no option, which implies 'hard labour'.

M. OER is warmly welcomed by the developing countries, because this will provide access for students and institutions to learning resources, which previously were restricted to specific institutional use only. ODL Universities can benefit from OER materials in being able then to reduce the costs for developing their learning materials. There also exist, however, serious barriers for the use of OER in developing countries: (i) the low degree of access to ICT facilities

and the corresponding high costs, and (ii) the social and cultural context for the learners and the society in which they live, which may be very different from the environment where the materials have been developed. Localization is absolutely necessary.

N. The Quality Assurance (QA) issue is addressed in the report but its extreme importance cannot be overestimated. The ODL Universities could contribute to this easily by labeling their OER materials with their reputations and brand names (as is suggested in the report). In Europe the EADTU has run a QA project, called Excellence, addressing the quality of e-learning along various aspects. The outcomes have been generally applauded, are very practical for direct operational use, and might be valuable for the QA of OER.

5. Outcomes of the 2007 ICDE SCOP Meeting at OUNL

The SCOP Meeting at OUNL with its theme ‘Open Educational Resources as an instrument for achieving Education for All’ was an important event for the Task Force. One could say that the SCOP Meeting was acting temporarily as an extension of the TF, developing feedback, critically reflecting, generating ideas, setting priorities, and giving direction to the OER future for ICDE and its membership...

The SCOP Meeting is an exclusive meeting for the leadership of the ICDE member institutions (Vice-Chancellors, Rectors, Presidents, Directors, Principals). SCOP 2007 was attended by about 60 participants (of whom ten TF members) from 22 countries whereby all the continents around the world were represented.

The programme of the SCOP Meeting (see Annex III) shows a mix of plenary sessions with a variety of expert speakers from academia, research, government, industry, ODL University OER initiatives, UNESCO and OECD, and a series of highly interactive thematic workshops. The Dutch Minister of Education, Culture and Science was present at the opening session, thereby underlining the importance of the overall theme for the maturing Dutch knowledge-based society. The TF Chair presented the TF Interim Report as substantial preparatory work fit to SCOP 2007.

The three thematic workshops turned out to be very fruitful and effective. The participants were split in groups based on their regional (continental) origine: one Asian group, one European group and one group for the other continents.

In the first workshop on ‘What is OER for the ICDE membership?’ the discussion focused around the question what in OER is typical for ODL institutions (the ICDE membership) and what issues might be of a more general nature, for all institutions in (higher) education to consider, or for national authorities to deal with.

The second workshop on ‘Policies, impact conditions and implementation for the ICDE membership’ addressed the question what ICDE can and has to contribute to the worldwide OER movement and in service to its members. Because the participants were grouped according to their regional origine, it was easy to record the large diversity in topics that were put forward. As a basis a survey by UNESCO, identifying relevant topics when dealing with OER, was used. The topics were discussed and prioritized. Copyright issues, awareness raising and promotion, financial issues, quality assurance, learning support services, and assessment of learning were all topics scoring high amongst the participants, but in different orders of priority depending on the continental origin.

This workshop resulted in a recommendation to ICDE to establish a clearinghouse or support

centre for the membership. In this support centre information on the different topics could be provided. At the same time this support centre could track the progress of OER, the progress within member institutions and share this information amongst the membership. ICDE could also set up an online training programme for faculty and contribute to the clarification of standards on the metadata level in developing OER materials.

Workshop number three on ‘Sustainability of the OER approach for the ICDE membership’ touched the fundamental discussion on the business model of the institutions. If content is no longer the unique selling point, what is it then that institutions should market? Or does OER mean that institutions as we know them today are obsolete? The discussion was strongly related to the discussion in workshop number one, where an ICDE shaped definition of OER was considered. Depending on that definition, how ‘open’ is OER in the context of higher education and does ‘open’ necessarily mean ‘for free’?

The conclusion from this workshop was that there is not one definition of OER nor is there a single model for sustainability. There is a strong dependency on the local situation. The workshop results indicated a clear link between governments ambitions to increase participation rates in higher education and the need to redefine sustainability of OER provided by publicly funded institutions. This does not automatically mean that all learning with OER should be for free for the learner. It was concluded that ‘open’ is not equivalent to ‘for free’ for all components of the OER-based learning process. Again this workshop advised ICDE to establish a support facility for information exchange, learning from best practices and stimulating collaboration. A warning was issued not to replicate what other consortia already do.

With the TF Interim Report as input, the broad spectrum of relevant outcomes of the thematic workshops, the deep scholarly views from the variety of plenary speakers, and the engagement of all participants it was not difficult to close the SCOP Meeting with a proper and distinct set of conclusions and recommendations. The Task Force had a meeting next to SCOP 2007 in Heerlen, reviewed and virtually adopted the SCOP 2007 conclusions and recommendations, and added to them a minor extension in terms of some further actions to be planned by ICDE. The merger of the TF reviewed SCOP 2007 conclusions and recommendations and the TF extension will be presented in Chapter 7.

6. Further developments after ICDE SCOP 2007

We are witnessing a solid expansion of the global OER movement.

- ❑ there is an ever increasing number of initiatives worldwide. not only in Higher Education but also in Secondary Education, varying from top-ranked universities to regional colleges, from institutional consortia to individual actions, in a broad spectrum of disciplines
- ❑ the UNESCO OER Community is active as ever, after intensive earlier forums run by UNESCO’s International Institute for Education Planning (IIEP)⁵
- ❑ the Open Courseware Consortium run by MIT shows a substantially growing membership from a wide variety of institute in different countries around the world⁶
- ❑ the William and Flora Hewlett Foundation has been very instrumental by financing many OER projects, starting with MIT in 2001, and still is a crucial player in boosting the OER movement both with financial support and through their extensive network of expertise and advice.⁷

The recent developments in Europe are of particular interest within the context of this TF Report dealing as it is with OER for open and flexible learning in general and OER related to ODL Universities more specifically. The projects OpenLearn from UK OU and OpenER from OUNL,

both started in 2006, have come to the stage that both front running universities UK OU and OUNL must soon resolve their strategic dilemma regarding a full conversion to OER. The other eight ODL Universities in the EADTU/MORIL project are all developing their own OER strategy or implementing their own OER policy. Of these the Turkish ODL University Anadolu is the ‘champion’ with the announcement in 2008 (at its 50th anniversary) of a comprehensive OER strategy.

An interesting new EADTU initiative, partly financed by a Hewlett Foundation supplementary grant, is to organize an OER Seminar Series. This series consists of three OER Seminars. The OER Strategy Implementation Seminar has already taken place in May 2008 at UK OU, and was mainly targeting the European ODL Universities. Products of this first seminar in the series are available.⁸ Integral cases by UK OU (OpenLearn) and OUNL (OpenER) have been presented and discussed, dealing with such issues as strategy, sustainability, technology, IP, curriculum, academic, participation, quality, and organizational structures. In addition, a participants’ confrontation was set up with various institutional approaches of ODL Universities.

The OER Strategy Development Seminar is particularly meant for regular universities and associations of those universities, providing the sharing of knowledge and experiences resulting from the EADTU/MORIL initiative. K.U. Leuven is the host and the dates are October 28 and 29, 2008 (see Annex IV for the programme).

The OER Capacity Building Seminar, which is to set the stage for OER capacity building on various continents, will start with raising awareness and gathering different points of view, strategies and priorities on OER. This seminar will be organized in close interaction with UNESCO and is scheduled for January 2009 (dates still to be fixed) at UNESCO’s Headquarters in Paris.

Finally, in this chapter on further developments after ICDE SCOP 2007 it is worthwhile to note that:

- recently UNESCO has published an interesting document ‘OER: the Way Forward’, which is the fruit of the community’s collective reflection on how to advance the OER movement: it’s about the key issues, priorities, lead stakeholders, and what to do⁹

- one of the TF members, Fred Litto, gave a presentation on the work of the ICDE OER Task Force at the Fifth Pan-Commonwealth Forum on Open Learning (PCF5) in July 2008 in London; this was in an inspiring and well attended session dedicated to OER including other presentations by UNESCO (Susan D’ Antoni), Hewlett Foundation (Marshall Smith, Catherine Casserly), and Vijay Kumar from MIT on the National Knowledge Commission (NKC) in India

- of course OER will be discussed, evaluated, and advanced as one of the major themes in the upcoming 2009 ICDE/EADTU World Conference on 7-10 June in Maastricht, The Netherlands (labeled as the M-2009 Conference).¹⁰

7 Conclusions & Recommendations

As indicated in Chapter 5 here the merger will be presented of the SCOP 2007 conclusions and recommendations (as reviewed and virtually adopted by the TF) and the TF extension towards some further actions to be undertaken by ICDE.

The ten major conclusions in this Final TF Report are:

1. The primary question is: ‘How can OER contribute in responding to the ‘Education for all’ UNESCO policy, and to capacity building as well as widening participation & access?’

2. The secondary question is: ‘What role can be attributed to OER in developing or strengthening a knowledge-based society?’
3. Connecting the ODL universities characteristics to the OER concept promises to offer a most powerful line of action in society regarding both (primary and secondary) question.
4. ‘Open’ is not equal to ‘free’.
5. Keep OER away from a fundamentalist approach or a dogmatic view.
6. Diversity is crucial when considering the OER potential and opportunities regarding e.g. target groups, goals & ambitions, states of development, national systems, scale & scope, content share, etcetera.
7. Because of this diversity international prioritization is difficult and should be brought back to institutional and at most national level.
8. ‘Knowledge is a public good’ –as stated–requires public funding.
9. Sustainability is not for granted and depends on a change in funding schemes (change in weights of components or additional money).
10. It is necessary to explore the potential and added value of public-private interactions, collaborations, and partnerships.

The eight main recommendations in this Final TF Report are that...

ICDE (and its membership) should:

- A. Not address general OER issues (that is being done by many others already),but rather concentrate on the self-study and learner-centred approach in OER materials (the ODL flavour in OER as related to the profiles of the ICDE membership)
- B. Make a deeper analysis of the diversity regarding OER, the underlying assumptions or grounds and the required variety in actions (e.g. collaboration between ICDE and UNESCO)
- C. Develop practical reports or handbooks that relate OER to ODL regarding themes like OER implementation, Quality Assurance, sustainability, adaptation to language / culture, content & services , IPR / copyright, all of this based on case studies that can be made available (e.g. from frontrunners in Europe, from EADTU and other regional associations)
- D. Exploit the ICDE website as a forum for information exchange and discussion, establish a support centre for the ICDE membership and other mechanisms in order to exchange strategies, policies, best practices, and expertise, as well as to stimulate collaboration
- E. Contribute to awareness raising and mobilize political resonance as well as media exposure using ICDE as a brand
- F. Make a list of possible concerns (from faculty, students, institutions points of view) that can be expected and formulate responses
- G. Develop further collaboration with regional/continental ODL associations (EADTU, AIESAN ,AAOU, ACDE, USDLA, ABED,...) and other international organizations(UNESCO, OECD, Hewlett Foundation, Open Courseware Consortium, Commonwealth of Learning / COL, SEAMEO,...)
- H. Start OER Summer Institutes in order to prepare faculty, one per region/continent in co-operation with the appropriate ODL associations and with selected member institutions taking the lead; attendance by members of ICDE (at a discount) as well as non-members.

Recommendation (H) regarding the OER Summer Institutes has a natural link with the EADTU Initiative, financed by the Hewlett Foundation, to start an OER Seminar Series in 2008, as discussed in the previous Chapter. The last of the three EADTU OER Seminars is a capacity building seminar for the leadership at ODL Universities outside of Europe in order to reach out to the other continents. It will be held at UNESCO’s Headquarters in Paris (where we started the ICDE TF work) in the beginning of 2009 and may be considered to offer an exploratory platform (or prototype) for subsequent regional/continental OER Seminars (or Summer Institutes). It would be wise to join forces between ICDE, EATU and other ODL associations in

this respect.

Finally, the Task Force recommends to the ICDE Executive Committee to discharge the TF from its duties, to dissolve the TF, and to install a new Task Force with experts from ICDE members that can work on the recommendations provided in this report. The mandate of such a newly formed Task Force should be in agreement with the ICDE Executive Committee.

With respect to this Final Report the Task Force advises the ICDE Executive Committee to publish an appealing public version and to organize political resonance and media exposure around it. In as many countries as possible-through the intervention of ICDE members-this public report should be made available to the press and be disseminated to the relevant stakeholders.

8 Epilogue: does India show the way?

India has a high-level advisory body to the Prime Minister, the so-called National Knowledge Commission (NKC). NKC operates since October 2005 and has published two (annual) Reports to the Nation. The follow-up to the reports has shown-according to NKC-laudable support from the government in terms of adopting its recommendations and providing appropriate funding as well. The NKC Agenda places high priority on education as a central instrument for achieving rapid and inclusive growth with specific emphasis on expansion, excellence and equity.

‘Report to the Nation 2007’ reviews the (earlier)2006 recommendations and specifies the (new) 2007 recommendations.¹¹ This 2007 set of recommendations covers a wide range of areas: Health information Network, Portals, Legal Education, Medical Education, Management Education, Intellectual Property Rights, Innovation, Traditional Health Systems, and Legal Framework for Public Funded Research, plus two areas that are specifically relevant for this Task Force Report: open and Distance Education (ODE) and open educational resources(ODR).

On page 17 of the report NKC states that ‘distance education can provide access to education for a large number of students, including for learners with special need. With the proliferation of media like television, radio and internet, its reach can be significantly increased. NKC recommendations on distance education focus on creating a national ICT infrastructure, developing web-based common open resources, establishing a credit bank and providing a national testing service.’

And on pages 51-52 the NKC report addresses open educational resources.
Below we include three interesting quotes...

‘Our success in the knowledge economy hinges to a large extent on upgrading the quality of, and enhancing the access to, education. One of the most effective ways of achieving this would be to stimulate the development and dissemination of quality open access (OA) materials and open educational resources (OER) through broadband internet connectivity. This would facilitate easy and widespread access to high quality educational resources and drastically improve the teaching paradigm for all our students.’

‘A set of key institutions should be selected and experts representing diverse knowledge areas like agriculture, engineering, medicine, arts, humanities, science, education, etcetera should be asked to develop standards-based content, which can be customized to diverse user needs. This should be made available not only to Indian institutions but also for global use.’

‘The content in the repositories should be multimedia, interactive and available in different regional languages. These projects should cover a wide range of subjects mentioned above. To speed up the creation, adaptation, and utilization of OER, it is necessary to launch a ‘National E-content and Curriculum Initiative’.’

国际开放与远程教育理事会 (ICDE)

开放教育资源 (OER) 全球特别工作组总结报告

起草人：Fred Mulder (工作组主席)、Jos Rikers(工作组支持)

0 引言

2001 年，麻省理工学院 (MIT) 发起了它的开放课程 (OpenCourseWare) 创举，自那以后，现在被称为“开放教育资源”的运动在世界范围内传播开来。在开放、灵活和远程学习领域，若干意义重大的举措正在进行之中，例如：在欧洲有英国开放大学的“开放学习”、荷兰开放大学 (OUNL) 的“开放教育资源”以及远程教育大学欧洲协会 (EADTU) 和其成员的“独立学习多语开放资源 (MORIL)”。一些组织像联合国教科文组织 (UNESCO) 等从一开始就对这种发展产生了兴趣。开放教育资源对于发展中国家来说有着特殊的现实意义。与开放、灵活和远程学习相结合的开放教育资源对“方便、更好地接受教育”甚至贡献更大。

国际开放与远程教育理事会决定成立一个国际开放与远程教育理事会开放教育资源全球特别工作组，这一决定基于对这一运动重要性的认识，并在 2006 年 6 月在利勒哈默尔举行的国际开放与远程教育理事会大学校长常设会议讨论的基础上作出的，讨论是在国际开放与远程教育理事会和联合国教科文组织 (UNESCO) 之间展开的，这一特别工作组包括来自不同的大陆、文化和教育途径的成员。这个新的特别工作组是在 2006 年 9 月在里约热内卢召开的第 22 次国际开放与远程教育理事会世界会议过程中宣布的。为显示对这一举措的支持，联合国教科文组织 (UNESCO) 邀集了该特别工作组在 2006 年 9 月在巴黎的联合国教科文组织 (UNESCO) 总部召开开幕会议。

2007 年 6 月，由荷兰开放大学 (OUNL) 主办的国际开放与远程教育理事会大学校长常设会议在海尔伦召开，这次国际开放与远程教育理事会大学校长常设会议是完全专用于开放教育资源的，会议是以“开放教育资源作为建立面向所有人的教育的手段”为主题的。这次大学校长常设会议对于推进特别

工作组的工作有很大帮助,特别工作组的工作是以提交给 2007 年度大学校长常设会议的临时报告为基础的,报告由特别工作组主席起草。报告对于在大学校长常设会议参与者中间进一步推动关于开放教育资源的思考也是有帮助的,不仅是从开放教育资源作为一个具有创新性和挑战性的观念来思考,同时也是从开放教育资源战略和执行脚本上思考。紧接着海尔伦大学校长常设会议之后,特别工作组举行了会议,标出了大学校长常设会议的主要结论和建议,并且在如何推进工作上达成一致。通过递交总结报告给 2008 年 10 月在上海由上海电视大学主办的国际开放与远程教育理事会大学校长常设会议,并由国际开放与远程教育理事会接受之后,特别工作组完成了它的使命。

这份总结报告包括以下章节:

1. 特别工作组的范围和组成
2. 在国际开放与远程教育理事会成员中关于开放教育资源的调查结果
3. 在巴黎联合国教科文组织 (UNESCO) 总部召开的 2006 年特别工作组开幕会议的成果
4. 关于开放教育资源的经合组织 (OECD) 报告中具有国际开放与远程教育理事会特色的一系列概念
5. 2007 年荷兰开放大学 (OUNL) 国际开放与远程教育理事会大学校长常设会议的成果
6. 国际开放与远程教育理事会 2007 年大学校长常设会议后的新进展
7. 结论和建议
8. 结束语:印度找到了开放教育资源的途径了吗

1 特别工作组的范围和组成

国际开放与远程教育理事会开放教育资源全球特别工作组通过其成员与世界各个地区相连接,也与其他开放教育资源的举措相连接,它包括一名来自联合国教科文组织 (UNESCO) 的代表。

特别工作组有下列成员:

- ✓ 弗雷德•穆尔德 (Fred Mulder)(主席), 校长, 荷兰开放大学, 荷兰
(也是荷兰海尔伦 2007 年 国际开放与远程教育理事会 大学校长常设会议 会议主席、荷兰马斯特里赫特 2009 年 ICDE/EATU 世界会议主席和 EADTU /MORIL 特别工作组主席)
- ✓ 尼克•阿伦(Nick Allen), 教务长, 美国马里兰大学学院, 美国
- ✓ 苏珊•安东尼(Susan d'Antoni), 计划专家, 国际教育规划研究所, 教科文组织
- ✓ 斯图尔特•汉密尔顿(Stuart Hamilton), 首席执行官, 澳大利亚开放大学, 澳大利亚
- ✓ 赫尔穆特•霍耶(Helmut Hoyer), 校长, 远程教育大学 (FernUniversität) , 德国 (也是 2007 年底以前代理国际开放与远程教育理事会主席)
- ✓ 萨莉•约翰斯通 (Sally Johnstone), 副校长, 学者, 薇诺娜州立大学, 美国
- ✓ 弗雷德里克•M•里特 (Fredric M. Litto) ABED 主席, 巴西
- ✓ 贝尔纳•卢 (Bernard Loing), 国际开放与远程教育理事会常驻联合国教科文组织代表, 法国
- ✓ 弗里茨•派耐克 (Frits Pannekoek) Pannekoek , 校长, 阿萨巴斯卡大学, 加拿大
- ✓ 保立那•派能 (Paulina Pannen) , 主任, 东南亚区域开放学习中心, 印度尼西亚
- ✓ 巴尼•皮蒂亚纳 (Barney Pityana), 副校长, 南非大学, 南非 (也是 2008 年 1 月国际开放与远程教育理事会执行委员会成员, 原 ACDE 主席)
- ✓ 雷达•罗尔 (Reidar Roll), 国际开放与远程教育理事会秘书长
- ✓ 塔里克•肖克伊 (Tarek Shawki), 主任, 信息社会与教育 ICT 部门, 联合国教科文组织
- ✓ 埃特维•苏普曼 (Atwi Suparman), 校长, 特巴克大学 (Universitas Terbuka), 印度尼西亚
- ✓ 大卫•文森特 (David Vincent), 代理副校长, 战略规划和对外事务, 开放大学, 英国 (也是 EADTU 主席)

另外, 特别工作组受到下列人员支持:

- ✓ 乔斯•利克斯 (Jos Rikers), 国际关系高级官员, 荷兰开放大学 (OUNL)(也是 2007 年荷

兰海尔伦国际开放与远程教育理事会组委会主席和荷兰马斯特里赫特 2009 年 ICDE/EATU 世界会议组委会主席)

✓ 安娜·帕罗那 (Ana Perona), 助理秘书长, 国际开放与远程教育理事会 秘书处(2007 年部分: 代理秘书长)

✓ 妮娜·巴格雷 (Nina Bagley), 信息和成员服务主任, 国际开放与远程教育理事会 秘书处

特别工作组的授权是形成一个关于开放教育资源的报告。这个报告的目的地促进全球开放教育资源运动, 增加国际开放与远程教育理事会特有的特色和价值, 这种增加是通过采用自我和远程学习的方法而不是目前主流的班级授课的方法。

报告将处理各种事项, 包括:

- ☐ 可用性/通道
- ☐ 知识产权
- ☐ 内容的国际化和本土化 (指语言和文化)
- ☐ 学习社会的支持
- ☐ 质量控制
- ☐ 筹措资金和可持续商业模式
- ☐ 与适当程度学习的交接
- ☐ 在非正式、无形式和正式学习之间架设桥梁的可能性
- ☐ 目标组内的多样性
- ☐ 与已存在供应机构、各种选择、误用、供应机构的获益有关的经验/好的做法
- ☐ 发展中国家使用开放教育资源的潜力
- ☐ 公共和私有部门的角色改变
- ☐ 与小组有关的其他议题

特别工作组将产生一个报告，与其他方面一起服务于：

- 高等教育/开放和远程学习机构，当它们在决定是否作为一个提供者或接收者来介绍（或不介绍）活动的时候
- 作为概念的推进基础
- 作为有兴趣的利益相关者的指导方针
- 国际开放与远程教育理事会对自己在这一领域内的战略界定，包括成员间合作行动计划的建议
- 从一个独立（自主）学习的视角为全球运动做出贡献，这种学习是基于远程学习而不是面对面教学
- 作为 2007 年国际开放与远程教育理事会呈现、考虑和讨论的文本

2 国际开放与远程教育理事会成员间关于的调查

在 2006 年 10 月中旬，国际开放与远程教育理事会成员收到一份关于的调查¹。

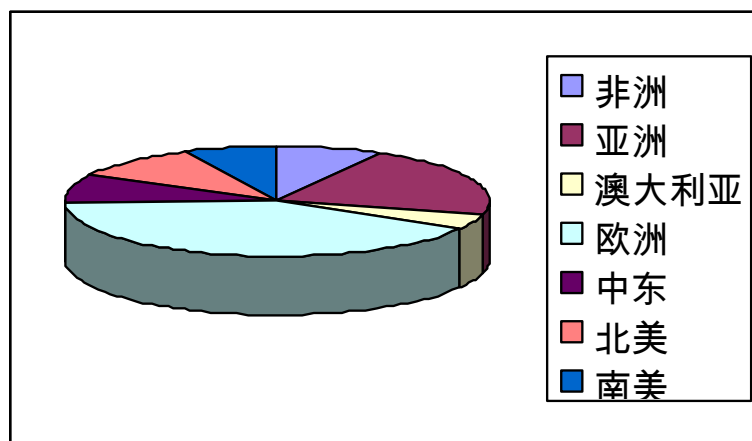
目的是获得有关生死攸关议题和在这场运动中国际开放与远程教育理事会成员参与程度的概况。

相当一部分来自世界各地的成员（17%）对调查作出回应。结果表明对于世界范围内许多机构来说是一个实际的主题。

对于他们有关运动知识的问题，68%确定知晓这个运动，然而有 32%对它不是太熟悉。

作出回应的机构的地理分布

¹ 这个调查为乔斯•利克斯（Jos Rikers）（荷兰开放大学）起草，由 ICDE 秘书处处理



对于机构涉及或者参与有关项目的问题，60%是肯定的，而 40%是否定的。项目参与者对此也有描述，并且提供了到相关网站的链接。

可能带给开放、灵活和远程学习机构的主要机遇，可以总结为：

- 使更多人能够便捷地获得优质的学习材料
- 成本效益：它可帮助远程学习提供者在开发学习资源和提供支持服务方面的成本更有效
- 更多的面向所有人的学习资源
- 国家和机构能以较少的财政资源获得优质学习材料，以促进他们的能力建设
- 灵活性：学习资源的更加多样化将创造更多的灵活学习的机会
- 例如可通过创作共享 (Creative Commons) 许可中的“相同共享”(“Share-alike”) 条款类似的方式，有机会分享可能的资源，增加成为伙伴关系的机会，

开放教育资源 () 可能给开放、灵活和远程教育机构带来如下主要危险：

- 版权、知识产权问题：对作者的限制性作品潜在的版权侵害
- 质量：没有合适审查程序的可能导致低质量的资源
- 文化控制/全球化：潜在地增加了在数字形式上划分的风险
- 缺少切实可行的新的商业模式来替代旧的模式

- 著名“品牌”机构可能吸引更多的学生
- “非本地发明”综合症，使用他们自己材料的学术偏好
- 缺少创造性：研究和创新和对材料的统一规定的较小范围，对知识生产激励较少
- 内容与学习材料不同

最后，调查中对回答关于他们参与国际开放与远程教育理事会活动的兴趣时，有 92% 的人是肯定的。

关于调查结果的更多信息可从国际开放与远程教育理事会秘书处获得。

3 2006 年在巴黎联合国教科文组织 (UNESCO) 总部召开的特别工作组开始会议的成果

在巴黎 11 月 12-13 日召开的特别工作组开始会议由 UNESCO (Dr. Abdul Kahn) 为东道主，这是第一次围绕的富有成效的、必要的互动行为。所有特别工作组成员都给出了重要输入。

尤其特别地是以下人员作的三个报告：

弗雷德·穆尔德 (Fred Mulder) (OUNL ，工作组主席)，*《以新的学习者中心模式带来全球运动》*

(*Bringing a global movement on in a new learner centered mode*)

简·海伦 (Jan Hylen) (OECD)，*《关于进一步发展的最重要问题的概览》* (*An overview of most important issues related to the further development of*)

乔斯·利克斯 (Jos Rikers) (OUNL ，工作组支持)，*《国际开放与远程教育理事会 TF 调查结果》*

(*国际开放与远程教育理事会 TF Inquiry results*)

这些报告可从国际开放与远程教育理事会秘书处获得，也可获得其他大量关于会议的报告。

这里仅呈现来自会议的十大亮点：

(1) 主要信息是，运动应更关注独立学习者，在强调数字班级内容分布的“传统”之上。这表明：

- “开放”意在有助于更好、更容易的获得
- “教育”被作为是直接指向学习的，并且是以学生为中心的方式
- “资源”被作为广义的解释，不仅仅为了支持教师，也是支持学习者

这是国际开放与远程教育理事会成员已经形成的一个典型视角，而且能受到国际开放与远程教育理事会与 UNESCO 的协作支持。

(2) 为了标明在某种程度上不同的样式，我们本想用开放学习资源 (OLR) 一词而不是，另外，有人提出的定义太模糊，它是指一个过程，一个目标，大块还是小块？想要什么程度的间隔？它意思是为了教师还是学生者，或者是两者？然而，有一种相当普遍的感觉，那就是要有一个尽可能宽阔和普遍的概念，因而保留了“教育”一词。MIT 提供的主要是内容，不是学习材料。本特别工作组需要发展国际开放与远程教育理事会的触觉。

(3) “开放”并不意味着“免费”。MIT 把内容放在网上，但学习的经验不是免费的，教学也不是。网站上的材料可能是免费的，但通过服务加入的价值不可能是。我们如何划出一条线？“开放”和“免费”是不同的概念。门槛一定要低，一定要易于找到，有吸引力，为人们提供进入高等教育的便利途径。概念是新的：我们不知道事情将会怎样发展。

(4) 概念太抽象。对于某一国家的某一教师或学生来说，其位置在哪里？我们需要一个由下向上的方法，不是由上而下的方法。发展中国家不想看见他们仅仅作为使用者，而是同样作为生产者。

(5) 简·海伦 (Jan Hylen) 领导了一次关于运动地图与范围的 OECD 研究，有一些发现与初步结论：

- 这是一个全球性运动
- 举措与资源的数量在增加，但缺少精确数据
- 使用者数量在增加，主要是中等教育以上教师、学生和公众
- 使用者数据缺乏，因为容易进入，大部分供应者没有注册

一种基本观察认为在高等教育机构之间对资金和生源的竞争正在加剧。有些机构拿出了学习材料，另一些机构却把内容捂得更紧，这表明什么？

(6) 以麻省理工学院 (MIT)，约翰霍普金斯大学 (Johns Hopkins)，塔夫茨大学 (Tufts) 为来源，OECD 研究给出了使用情况和使用者情况的特点：

- ☐ 受良好教育 (学士或硕士) 的自学者，来自北美
- ☐ 因为它的灵活性和高质量，经常用它来作为补充
- ☐ 主要以小块学习为主

(7) 根据 OECD 的研究，机构可能持有下列动机：

- ☐ 利他性原因
- ☐ 通过允许机构间的免费分享和再利用来影响纳税人的钱
- ☐ “你拿出去，收回时会有改进”
- ☐ 良好的公共关系是吸引学生的窗户
- ☐ 随着竞争的不断加剧，需要新的、有吸引力的、有特色的模式
- ☐ 刺激内部改进、创新和再利用

个人动机可能是：

- 利他性原因
- 渴望刺激创新
- 希望用创造性和教育性目的进行分享
- 宣传或声誉
- 可能是软件里的开放资源活动 (提升自我)

(8) OECD 研究指出下列主要挑战：

- ☐ 资源的质量和相关性

- ☐ 知识产权，版权和许可
- ☐ 可持续性
- ☐ 目标
- ☐ 组织：大小，结构，程度
- ☐ 分享的资源类型和媒介形式

作为可能的收益模式，OECD 研究提出：

- 取代模式：取代其他费用（有天然的限制）
- 资金捐赠模式（用于起动）
- 分割模式，为使用环节提供附加的价值服务
- 转化模式（商业模式）：拿出一部分来建立市场并把消费者转化为付费顾客
- 志愿者支持模式
- 捐助人付款模式：捐助人付费，提供者让别人免费使用

（9）OECD 研究认为的技术问题：

- ☐ 开放资源软件 and 标准
- ☐ 元数据收集
- ☐ 安全、隐私，并长期提供
- ☐ 个别教职工和学生在校网络外使用免费服务
- ☐ 谁拥有信息？如果一个经营这些信息，怎么收费呢？
- ☐ 信息和研究数据的长期提供

另外，OECD 研究也提出下列问题：

“新在什么地方？”

- 以草根参与的方式来做生产者和使用者

- 多种动力系统的力量：利他性和经济驱动
- 向新的商业模式开放
- 把新的互联网模式 (web2.0) 引入教育
- 技术的发展挑战高等教育机构
- 旧瓶装新酒：这是再次大肆宣传电子学习的办法吗？

(10) 关于 OECD 研究的一些评论：

□ 缺少激励与推动力的问题：我拿回了什么？没有回报系统，学者们将不愿意合作。

在许多发展中国家，教师在准备学生时是有收入的，**我们需要一个能说服人们拿出他们的材料的商业模式。**

□ 没有提到语言问题！有一个文化势力范围的问题。英语的控制力过于强大。我们一定要注意学习的文化模式和学术文化。无门槛和开放在不同文化情境中是有区别的。

□ 为了能够区别和评价可用材料的质量，“信息素养课程”将会是必需的。

□ 关键问题是推动关键的决策者来使材料变得具有可用性。仅仅 1% 的大学财政预算花费在“开放存取”出版社上的状况要根本改变。

□ 特别工作组应当怎样设计或建立一个免费系统，来把各参照系统或模板结合起来。各系统怎么样相互对话。现在“港口”和“仓库”互不交流，还有很多的通道问题。

□ 的发送格式是非常重要的,获得技术的带宽/通道成为问题，怎样在特殊情境下发送也会不断变化。

□ 国际开放与远程教育理事会的特别特色是什么：国际开放与远程教育理事会在方面的品牌和独特性将会是什么？或许没有必要单独对个别学习者去陈述。它可能是习以为常的能力建设，或者从习以为常的观点来看，是一个学习者中心的方法。

六条来自特别工作组启动会议上所关注的言论：

- UNESCO 与像微软和苹果之类的一些公司合作
- SMS 移动电话在亚洲的普遍使用
- 加拿大在阿萨巴斯卡大学的一个尝试，即建立一个“开放存取”出版社，以创造能放在 i-pod 上的内容
- 试图建立一个全葡萄牙语的虚拟社区性质的新巴西开放大学
- 联合国教科文组织国际教育规划研究所 (UNESCO-IIEP) 已建立一个社区来支持国际意识
- 相矛盾的运动，如美国“爱国者法案”所导致的。

总结

关于特别工作组的授权.....

- A . 我们不应指出所有一般的话题 (已经有很多人在研究了)，但是在材料中，要集中于自我学习和学习者中心的方法，换句话说，形成方面的国际开放与远程教育理事会特色。
- B . 我们能借助各种丰富来源：UNESCO、休利特基金会 (Hewlett Foundation)、OECD、开放课程联合会 (Open Courseware Consortium)，远程教育大学欧洲协会 (EADTU) 等。
- C . 在国际开放与远程教育理事会成员间广泛应用的开放灵活学习情境中，有必要对定义作出基本的回应——虽然这种情境有各种样式。
- D . 一个极其重要的问题是商业模式，文化、语言、政治和经济的多样性也是如此。
- E . 我们标出首要问题：“怎样致力于回应‘为了所有人的教育’的 UNESCO 政策、能力建设、拓宽参与和获取途径？”(强调发展中国家的背景)。
- F . 第二个问题是：“在建设或者完善知识社会中，以什么角色来为做出贡献？”(强调发达国家情境)。

4 国际开放与远程教育理事会对经济合作与发展组织开放教育资源 (OECD) 报告观点的评审

在前面章节所指的 OECD 研究形成了一个报告，是最终草案，送交特别工作组成员获取来自国际开放与远程教育理事会视角的反馈。

把 OECD 草案报告送交特别工作组成员反馈之后，以确定形式由 OECD 出版了（5 月 22 日），标题是：“免费送知识：开放教育资源的紧迫性（*Giving Knowledge for Free: the Emergence of Open Educational Resources*）”²

在检查人员的观点中，他们同意 OECD 报告是优秀的。这是一非常相关并且可读的报告，并将被推荐给那些希望对概念和全球运动有较深了解的人，同样也推荐给所有活跃于领域内的人。一方面，它有概括性报告的特点；另一方面，它以适当、实用的方式给出了如何处理主要问题的方向。它确实对世界范围内所有对感兴趣的个人、组织和政府具有价值和吸引力。

然而，特别工作组同样产生了一系列看法和评论，有支持的、质疑的或者批评的，最相关的一些总结在下面。

总结

最相关的检查看法是……

- A. 有四个变化力量对高等教育有高度影响，它们是全球化、人口统计学、统治方式和技术，除此之外，我们可以发现第五个重要变化力量，也是第五个对高等教育的挑战，那就是**大幅提升高等教育总人数的需求**。目前主流的基于校园的高等教育不能满足如此大的需求。在这方面，和开放灵活学习的模式提供了相关的解决办法。
- B. 终身学习没有得到较多关注。然而，提出的非正式学习、无形式学习和正式学习之间自然的桥梁架设，以及提供主要的机遇来拓宽和增加高等教育的参与性，这使可能成为终身学习（LLL）领域中最有力的武器。
- C. 报告中提及了公共资金。考虑到知识是公共产品，应真正免费地提供，政府在高等教育（和

² 见：<http://www.oecdbookshop.org/oecd/display.asp?K=5L4S6TNSM3S5&CID=&LANG=en>.

总体教育) 的通道、质量和效率方面被假定的责任, 这些证明这是讨论一个政府提供资金的“产品”。

- D. 从终身学习 (LLL) 视角来看, 网上免费获得的内容应使学习者能够真正的在开放灵活学习环境中依靠自己学习, 不 (避免) 涉及到教师、班级或教育机构。这要求结构化的、明确的、学习者中心的内容设计, 而不上传统的教师中心的内容方式。
- E. 有人可能问, 对于开放, “无成本”是否是最基本的, 或者这实际上是一个复杂的机制, 这个机制能扫除所有传统存在的障碍: 机构注册、文凭/证书要求、校内上课与面对面会议、固定课程、严格的进度、过于专门化的大纲、太大的大纲组成以及其他。这实际上是开放和远程学习 (ODL) 大学的有特色的开放的生死攸关所在: 按最广泛的解释, 对通道、地点、日程、进度和综合课程的开放, 与对人、方法、观点的开放一样。把这种开放与相连, 能够使 ODL 大学成为运动中的重要选手。
- F. 许多使用者好像是有良好教育的学习者。这并不奇怪, 因为材料一般不是为自学而设计, 这就是为什么在没有另外引导或支持下要求学员有一个较高教育水平的原因。这意味着的潜能远没有开发出来。报告在前面指出了三个来自 ODL 大学的欧洲举措 (UK OU-OpenLearn, OUNL-OpenER, EADTU-MORIL)。³这些活动可视为发展中的新一代 (“第二波”), 因为它们的学习材料是明确为自学而设计的。这与提供教室学习材料相比, 明显减少了自学者的困难。如果我们严肃的看待 UNESCO 的“人人都要受教育”的目标, 这是极其重要的, 这也是与前面关于人数升级、LLL 和非正式学习的评论相连接的。
- G. 开放课程应该考虑到其他国家的知识和版权遗产, 特别是在中国。应该意识到开放课程是可能会成为一方的行为。如果对开放课程的“索取者”比“贡献者”, 世界将会更富裕吗? 如要

³ 见:

<http://www.open.ac.uk/openlearn/home.php>;
<http://www.opener.ou.nl/>
<http://www.eadtu.nl/>

欧美中心的机构控制着贡献——好像就是这样——国际化成果将会是什么？

H. 的彻底开放导致在连续与互动的发展和补充过程的巨大灵活性，无论是任何地方、任何时候还是任何人。贡献者愿意投入时间为活动去工作，并且享受来自任何时间、任何地方的其他人的输入与反馈。然而，一旦作为推动者的热情减退，保持材料在高质量上的更新可能是非常困难的。

I. 报告没有提供具体有力的经济模式。然而，高等教育机构有各种选择来找到可能的收入，不是来自内容，而是来自声望，来自考试过程，来自对学习者的个人支持。

J. 在一些地区和领域，信息和通信技术（ICT）可能缺乏，有“（预期的）使用者被落在后面”的危险，因此，成功的运动的先决条件是更容易、更好地通向 ICT 设施的通道，这一点表明，在任何行动计划中，它应有高度的优先。

K. 在许多国家，并不广泛地说英语，几乎不可能有效地加入国际社会。一个办法就是以不同的（工作）语言来开展的举措。这种做法是鼓舞人心的和必要的。然而，要与来自世界不同地区的同事一起充分分享经验和课程，语言仍是一个障碍。

L. 一般的翻译是不足够的，因为学习材料的转换也应包括对不同社会文化情境的适应。因此，所谓的“本土化”过程自动化不是办法，这里暗示了“艰苦的劳动”。

M. 受到发展中国家的热烈欢迎，因为这将为学生和机构提供通向学习材料的通道，以前这仅限于专门机构的使用。因为能够减少它们学习材料的开发成本，开放和远程学习（ODL）大学能从材料中受益。然而，在发展中国家，使用也有严重的障碍：（i）获得 ICT 设施的程度很低，并且相应的费用很高，（ii）学习者和他们生活的社会文化情境，与材料开发国家的环境是非常不同的。本土化是绝对必要的。

N. 质量保证（QA）话题在报告中提过，但它的极其重要性从来没有被高估。开放和远程学习（ODL）大学可通过它们声誉和品牌给材料贴标签（像在报告中建议的一样），这很容易做

到。在欧洲 ,远程教育大学欧洲协会(EADTU)使用一个 QA 项目 ,叫作“卓越(Excellence) ,
来从各个方面把握电子学习的质量。它的成果受到普遍欢迎 , 在直接操作使用方面是很实
用的 , 并且对质量保证可能是有价值的。

4 鉴定 2007 年在 OUNL 召开的国际开放与远程教育理事会的成果

在荷兰开放大学 (OUNL) 召开的以“开放教育资源作为建立面向所有人的教育的手段 (Open Educational Resources as an instrument for achieving Education for All)”为主题 , 这个会议对于特别工作组来说是一个重要事件。你可以说大学校长常设会议作为特别工作组的临时延伸、开展反馈、批评性反应、产生观点、设置优先并且为国际开放与远程教育理事会和它的成员的未来指出方向.....

大学校长常设会议是一个专用会议 , 专用于国际开放与远程教育理事会成员机构的领导 (副校长、院长、主任、校长)。2007 年大学校长常设会议有来自 22 个国家的大约 60 位参会者 (其中有 10 名特别工作组成员) , 全世界所有大陆都有代表。大学校长常设会议的议程显示了一个全体会议的混合 , 它的不同专家发言人来自学术界、研究机构、政府、产业界、ODL 大学行动组、UNESCO 和 OECD , 并且会议包括一系列高度互动的主题研讨会。荷兰教育文化科学部长出席了开幕会议 , 因此显示出总体主题对于荷兰建设知识社会的重要性。特别工作组主席介绍了特别工作组的临时报告 , 作为适应 2007 年的大量预备工作。

三个主题研讨会证明是非常富有成果的和有效的。参与者基于他们的地区 (大陆) 来源被分成小组 : 一个亚洲组、一个欧洲组和一个其他大陆组。

在第一个关于“对于国际开放与远程教育理事会成员来说是什么”的研讨会 , 讨论的焦点围绕着“在中什么是典型的 ODL 机构 (国际开放与远程教育理事会成员)”的问题和“什么问题更具有普遍本性”的问题 , 让所有 (高等) 教育机构来考虑 , 让国家权力部门来处理。

第二主题研讨会是关于“国际开放与远程教育理事会成员政策及其影响条件和执行”的 , 陈述的问题

是“国际开放与远程教育理事会能够和必须做什么来协助世界范围的运动和服务其成员”。因为参与者是按他们的地区来源分组的，很容易记录出他们提出的大量不同的主题。以 UNESCO 的一个调查为基础来发现关于的话题，这些话题经过讨论并安排出优先顺序。版权问题，意识产生和提高，资金问题，质量保证，学习支持服务和学习的评估，这些都是参与者高度关注的话题，但因来自不同的大陆，其优先顺序也有不同。

这个研讨会提出一个给国际开放与远程教育理事会的建议作为结果，要求国际开放与远程教育理事会为成员建立一个数据交换所或者支持中心。这个支持中心，提供有关不同的主题的信息。同时，这个支持中心能跟踪的进展、成员机构的进展，并在其他成员中分享这些信息。国际开放与远程教育理事会也可为全体成员建立一个在线培训项目，并且致力于在开发材料中关于原数据水平的标准澄清。

第三主题研讨会是关于“国际开放与远程教育理事会成员的方法的可持续性”的，触及了关于机构商业模式的根本性讨论。如果内容不再是唯一的卖点，机构用什么去面对市场？或者意味着我们今天所知道的机构过时了吗？这个讨论和第一个研讨会的讨论紧密联系，而且在第一个研讨会里，我们也考虑了国际开放与远程教育理事会对 做的定义，如果按照这个定义，那么在高等教育领域有多么开放呢？这个开放是指免费开放吗？我们可以从这次研讨会中总结出，不仅没有明确的定义，而且可持续性发展也没有单一模式。开放教育资源的发展和当地的实际情况密切相关。这次研讨会的结论表明，开放教育资源的可持续发展和社会公众的资助有明显的关联。不仅如此，一方面，政府想更多地参与高等教育发展；另一方面，政府需要对公立机构提出的开放教育资源的可持续性重新界定，这两方面是直接相关的。当然这并不意味着，开放教育资源学习资料都是向学习者免费开放的。可以说，对于所有参加开放教育资源学习程序的学习者来说，开放并不等于免费。这次研讨会还建议国际开放与远程教育理事会要建立一个能促进信息交流、学习最佳实践、加强彼此合作的技术设备。同时研讨议会还提醒国际开放与远程教育理事会，不要重复其他机构已经做过的东西。

特别工作组(TF)的中期报告，专题研讨会的许多相关结论，与会发言人的深刻独特的学术见解，

以及所有参与者的积极参与，正是这些使得大学校长常设会议成功闭幕，并得出了一些合理和独特的结论和建议。在大学校长常设会议之后，特别工作组在海尔伦举办了一个会议，评审实际上采用了大学校长常设会议的结论和建议，而且还按照国际开放与远程教育理事会制定的扩展性方案，对这些结论和建议进行了稍微的补充和扩展。在稍后的第七章我们将会阐述，合并后的特别工作组对大学校长常设会议的结论和建议的评审，以及特别工作组对它们的扩展。

6. 国际开放与远程教育理事会 2007 年大学校长常设会议之后的新进展

我们正在目睹开放教育资源运动在全球稳步开展。

- 首创精神的浪潮在全球不断高涨，不论是在高等教育还是中等教育领域，从世界一流顶级大学到地方学院，从研究机构到个人实践，再到不同学科，都在追求这种首创精神。
- 自联合国教科文组织国际教育规划所 (IIEP) 举办了先前一系列论坛以来，联合国教科文组织开放教育资源委员会一如既往地发挥着积极作用。
- 隶属麻省理工学院的开放课件联盟发现，世界各个国家的研究机构的会员人数都在急剧增加。
- 在资助开放教育资源项目上，威廉与弗洛拉·惠普基金会 (the William and Flora Hewlett Foundation) 已经发挥很大作用 (它首先资助了麻省理工学院 2001 年的项目)。该基金会凭借其财政以及庞大的专业技能和建议体系 (可登陆网站 <http://www.hewlett.org/Programs/Education/> 查看)，在推动运动发展的过程中，仍然扮演着关键角色。

特别工作组报告显示，近期开放教育资源运动在欧洲的发展特别有趣，欧洲人认为开放教育资源只是大体上向灵活性学习开放，开放教育资源和开放数字图书馆大学更具体地联系在一起。英国开放

大学的开放学习项目(UK OU)以及开放大学国家图书馆(OUNL)开放教育资源项目，都启动于 2006 年，至如今，这两类一流大学都陷入策略困境，一方面是学术壁垒，另一方面是开放教育资源，要完全转变为开放教育资源（ ）是有难度的。欧洲远距教学大学学会（EADTU）项目中的其他八个开放数字图书馆大学都是自己制定和执行策略的。在这些开放数字图书馆大学中，土耳其阿纳多卢开放数字图书馆大学在其 50 年校庆上宣布，它在制定全面开放教育资源策略上做得最好。

欧洲远距教学大学学会将举办开放教育资源系列研讨会，该研讨会还得到了惠普基金会的部分资助。这个系列包括三个开放教育资源研讨会。**开放教育资源策略实施研讨会**已于 2008 年 5 月在英国开放大学举办，此次研讨会着重讨论欧洲开放数字图书馆大学问题。第一个研讨会的成果已经公布(可登陆网站 <http://labspace.open.ac.uk> 查看)。会议讨论了英国开放大学（开放学习）和开放大学国家图书馆（开放教育资源）提出的主要问题，这些问题涉及了策略、可持续性、技术、网络协议、课程、学术合作、质量和组织结构诸多方面。另外，参与者遭遇的难处也提供给了开放数字图书馆大学，以便更好的完善服务方式。

开放教育资源策略发展研讨会专门为那些符合规定的大学和协会而举办的，目的是分享知识和交流经验。本次研讨会由 K.U.Leuven 主持，时间为 2008 年 10 月 28 日和 29 日。

开放教育资源能力建设研讨会，目的是在各州为开放教育资源能力建设提供一个舞台，将着眼于提高人们对开放教育资源的认识，以及对开放教育资源问题的不同观点、策略和优先考虑的事情进行收集和整理。这次研讨会的举办将和联合国教科文组织紧密配合，研讨会时间拟定于 2009 年 1 月（日期待定），地点在巴黎联合国教科文组织总部。

最后，这章关于国际开放与远程教育理事会大学校长常设会议 2007 年会议后的新进展，仍然有值得注意的地方：

- 最近，联合国教科文组织（UNESCO）公布了一个有趣的文件“开放教育资源：开拓道路前进”，这个文件是公众对如何推进开放教育资源运动反思的集体性成果：主要讲述了重大争议、优先

考虑的问题、主要的利益相关者以及该做什么。

□ Fred Litto，特别工作组成员之一，在2008年7月伦敦举办的第五届开放学习泛联邦会议上(PCF5)，作了一个关于特别工作组（国际开放与远程教育理事会 TF）工作的报告，这是一次令人鼓舞的值得参加的会议，所有人都围绕开放教育资源探讨。在这次会议上，联合国教科文组织（Susan D'Antoni），惠普基金会（Marshall Smith，Catherine Casserly），以及来自麻省理工学院的现就职于印度国家知识委员会（NKC）的 Vijay Kumar 都作了报告。

□ 毫无疑问，与会人员将对开放教育资源进行讨论和评估，而且要将其选为2009年 ICDE/EADTU 世界会议的主题之一，这次会议将于6月7-10日在荷兰马斯垂克（Maastricht）举行（标示为 M-2009 会议）。

结论和建议

正如第五章提及的那样，本章将要介绍合并的特别工作组对2007年大学校长常设会议结论和建议的评审（实际上已经被特别工作组接受），以及特别工作组对国际开放与远程教育理事会进一步措施的补充。

在这个特别工作组最终报告中，有如下十个主要的结论：

1. 主要的问题：“联合国教科文组织‘人人都能受教育’的政策，能力建设以及增加教育资源的享有机会，在对这些问题上，开放教育资源又能起到多大作用呢？”
2. 第二个问题：开放教育资源在促进和发展知识为本的社会上扮演什么角色呢？
3. 将开放数字图书馆大学(ODL)的特征和开放教育资源的概念联系起来，确保一个有力的措施来解决初等和中等教育问题。
4. “开放”不等于“免费”。
5. 让开放教育资源远离教条的方法和观点。

6. 在目标群体、目标和志向、发展状况、国家体制、规模和范围、内容共享等等问题上，当我们考虑开放教育资源能给予的潜力和机会时，多样性显得尤为重要。
7. 正是由于这种多样性，开放教育资源的国际优先等级无法划分，而且这种优先权应该回归机构，最多要回归国家层面。
8. “知识是一种公共产品。”-----正因为如此-----知识需要公共资助。
9. 可持续性模式也并非一成不变，它随着资助方案的变化而变化（随着各个组成部分或多余的资金、权重而变化）
10. 有必要探索社会与个人的相互作用与合作的潜力和增加值。

在特别工作组最终报告中，有如下八个建议：

国际开放与远程教育理事会（以及它的成员）应当：

- A. 不要研究一般的开放教育资源问题（因为其他人已经在研究了），要集中于研究开放教育资源材料中的自学和学习者中心的学习方法（将开放教育资源中的开放数字图书馆特色和国际开放与远程教育理事会成员的概况联系起来了）。
- B. 要对开放教育资源的多样性问题、潜在的假设或根据以及行动多样性（比如，国际开放与远程教育理事会和联合国教科文组织之间的合作）做出更加深入的分析。
- C. 开发关于开放教育资源和开放数字图书馆联系的实践报告或是手册，包括这样一些主题，如开放教育资源的实施、质量保障、可持续性、对语言和文化的适应、内容与服务、知识产权和版权，所有这都要以可以获得的案例为基础（例如，从欧洲的领先机构，欧洲远距教学大学学会以及其他区域型机构）。
- D. 开发国际开放与远程教育理事会网站并将其作为信息交流和讨论的论坛，还要为国际开放与远程教育理事会成员以及其他机构建立一个服务中心，以便交流策略、政策、最佳实践、专业知识和

加强它们与国际开放与远程教育理事会的合作。

E . 致力于提高人们对国际开放与远程教育理事会的认识与了解，鼓动政治效应和加强媒体对国际开放与远程教育理事会的宣传。

F . 将教职员、学生、机构观点所关注的一些问题列成清单，这些问题应是可以预见的，还要构想出解决方案。

G . 加强与区域性和欧洲大陆的开放数字图书馆机构（如 EADTU , AIESAD,AAOU,ACDE,USDLA,ABED,...）以及其他国际机构（如 UNESCO,OECD, Hewllet Foundation, Open Courseware Consortium, Commonwealth of Learning /COL, SEAMEO,...）进一步合作。

H . 开办开放教育资源（）暑期学校，每个地区或是每个州开设一个这样的学校来培养教员。暑期学校不仅要和合适的开发数字图书馆机构紧密合作，而且还要和选出来带头的成员机构合作；参加学习的对象包括国际开放与远程教育理事会的成员（如果愿意的话）以及非国际开放与远程教育理事会成员的人。

建议（H）中提到的暑期学校和欧洲远距教学大学学会（EADTU）的倡议有着很大联系，正如在前一章阐述的那样，EADTU 得到了惠普基金会的资助，举办 2008 年系列讨论会。三个 EADTU 研讨会的最后一个是能力建设研讨会，这是专门为欧洲以外开放数字图书馆大学的校长举办的，目的是为了将这个研讨会的影响传播到其他各洲。本次研讨会将于 2009 年初在巴黎联合国教科文组织总部举行（国际开放与远程教育理事会的特别工作组也是在这里开始工作的），同时我们也在考虑为随后的区域性或是大洲的研讨会（或暑期学校）建立一个探索式平台或者说模型。在这个问题上，如果国际开放与远程教育理事会、EADTU 以及其他 ODL 机构能够通力合作的话，将是很明智的。

最后，特别工作组向国际开放与远程教育理事会执行委员会建议，免除特别工作组的职责，解除

特别工作组，重新建立一个新的特别工作组，任用国际开放与远程教育理事会成员里的专家，他们能够致力于这个报告所提的建议。这样一个新的特别工作组的成立，应该取得国际开放与远程教育理事会执行委员会的同意。

关于这个最终报告，特别工作组建议国际开放与远程教育理事会执行委员会，将这次报告出版成能吸引社会公众的版本，并且要鼓动政治效应以及加强媒体宣传。借助于国际开放与远程教育理事会成员的努力，要使尽可能多的各个国家的出版社以及利益相关者都可以获得这份报告。

7 结束语：印度找到了开放教育资源的途径了吗

印度拥有直属于总理的高级咨询机构，即国家知识委员会（NKC）。印度国家知识委员会（NKC）成立于2005年10月，截止到目前，已经向国家递交了两个年度报告。印度国家知识委员会（NKC）在其随后的一些报告中表明，NKC取得了政府的积极支持，政府采用国家知识委员会（NKC）的建议并且向其提供适当的资金支持。国家知识委员会（NKC）的议程表把教育提到非常高的优先地位，把它看作是加快国家发展的主要工具，具体强调了教育扩张、教育优质和教育平等。

“2007年NKC报告”回顾了先前2006年报告中的建议，而且详细说明了2007年NKC报告中的建议。2007年NKC报告的建议涵盖了很多方面：卫生信息网、入口问题、法制教育、医学教育、教育管理、知识产权、革新、传统医疗卫生系统、社会资助研究的法律体制，还有两个和特别工作组报告特别相关的方面：开放和远程教育（ODE）和开放教育资源（ ）。

NKC报告的第17页这样写道，“远程教育向许多学生(包括有特殊需求的学习者)提供了他们接受教育的途径。随着媒体种类的激增，如电视、无线电和因特网，远程教育的影响范围显著增大。NKC报告对于远程教育的建议主要集中在以下几个方面：建立国家信息技术研究所（ICT）；开发基于网络的开放资源，成立信贷银行，提供全国考试服务。”

NKC报告的第51和52页陈述了开放教育资源。以下是我引用报告的三段：

“在很大程度上，我们在知识经济中所取得的成就应归功于我们着眼于提高教育质量和增加教育机会。而要达到这个目的，一个行之有效的方法就是通过宽带互联网的连接，促进开放入口（OA）优质资料的传播以及开放教育资源的发展。互联网将使学习者更加轻松地获取高质量的教育资源，也能彻底地提高教学方法。”

“我们应该挑选出一些重要的机构，还要要求一些代表多种知识领域的专家（如农业、工程、医学、艺术、人文、科学、教育等等）开发以标准为基础的不同内容，以满足有不同需求的学习者。这些开发的内容不仅供印度的机构使用，还要供全球其他国家使用。”

“知识库的内容应该是多媒体互动性知识，而且还要翻译成不同的区域性语言。这些规划设计应该涵盖上面所提到的科目。为了加快开放教育资源的创建、适应和使用，有必要开办一次‘全国教育内容和课程会议’。”

（黄复生校）