****

**OER Country Profile: South Africa**

**Prepared by Maryla Bialobrzeska**



**Contents**

|  |  |
| --- | --- |
|  | **Page** |
| 1. **Factors that might impact on OER adoption**
 | **3** |
| 1.1 Infrastructure and technical readiness | 3 |
| 1.2 Socio- cultural and economic factors | 4 |
| 1. **Policy and legal framework for OER adoption**
 | **5** |
| 2.1 National and institutional OER and OER related policies | 5 |
| 1. **OER Projects**
 | **11** |
| 3.1 Organisations and institutions engaged in OER and OER related work | 11 |
| 3.2 OER projects or initiatives at the regional, national and institutional level |  |
| 1. **Research on or related to OER conducted in South Africa or by South African researchers**
 | **21** |
| 4.1 Introduction | 21 |
| 4.2 Research conducted by the University of Cape Town (UCT) | 21 |
| 4.3 Research conducted by the University of the Western Cape (UWC) | 28 |
| 4.4 Research conducted by the University of South Africa (Unisa) | 29 |
| 4.5 Research conducted by the Meraka Institute | 29 |
| 4.6 Research conducted by the South African Institute for Distance education (Saide) | 30 |
| 4.7 research conducted by Neil Butcher and Associates (NBA) | 32 |

**OER Country Profile: South Africa**

1. **Factors that might impact on OER adoption**
	1. **Infrastructure and technical readiness**

In the years following South Africa’s first democratic election, in 1994 South Africa economy was deemed to be the most powerful on the continent. According to International Monetary Fund figures, it accounted for nearly 40 percent of all economic output in the sub-Saharan region in 2000.

That share dropped to 28 percent in 2010, in part because South Africa’s economy was caught in the global recession. It is anticipated that it will shrink further as countries such as Nigeria, Ghana and Uganda notch up growth of up to 7 percent or more compared to the 2.1 percent expansion forecast for South Africa in 2014.

In short, the country has not continued on the positive economic development trajectory that may have initially been anticipated. This and the historic underdevelopment of large areas of the country have resulted in many infrastructural challenges. In addition to the need for significant expansion of infrastructure provision, much of the existing infrastructure is also in need of urgent maintenance. This is particularly true of the electricity infrastructure. South Africa has, since 2007, faced serious electricity supply challenges (DPME and DBSA 2012: p 59) [[1]](#footnote-1)

Due to the fundamental human need for communication, and the aggressive marketing of mobile communications, mobile technologies became pervasive in South Africa by 2008. Currently, fibre optic cables provide the backbone for both the present mobile broadband networks and for future connections that will bring rapid, reliable and high quality broadband access. However many constrains still obtain. At present, a mere 20% of the cellular towers have the capacity they need for data, especially considering the anticipated demand in terms of smartphones and video growth (DPME and DBSA 2012: pgs 98-99).

Immense resources have been put in place to create a national digital infrastructure and South Africa is in the process of entering a new digital era but for the next five or so years, a large proportion of the population is still likely to remain without access to reliable, and affordable broadband connectivity (DPME and DBSA 2012: p 99).

Lack of funding and appropriate institutional support to roll out infrastructure in underserviced areas where commercial services are not available; and lack of access to computers/end user devices for the vast majority of the population are also still a challenge. The rapid expansion of mobile Internet on phones should therefore not be treated as evidence that computer roll-out is no longer a critical issue in South Africa. While basic communications and information may be accessed on a smart phone, these devices do not function optimally for study purposes. Enhancing access to computers is, however, a complex process. It is not as simple as supplying computers at low cost or even no cost. Such efforts require a supportive environment that includes hardware, software, training, content and applications that meet user purpose.

Of the 25 South African universities and universities of technology, (23, plus two new universities still in their embryonic phase, established at the end of 2013) 15 are located in large metropolitan areas. The rest, are in peri-urban or rural locations. The universities in the urban areas typically have better overall infrastructure and access to broadband. Many of the rural institutions are subject to both electricity and connectivity challenges thus making access very uneven across this sub-sector. The 2013 White Paper on Post Schooling (Department of Higher Education and Training) has set targets for significant expansion of both the university and TVET College (technical and vocational education and training) educational sub sectors, this will cause further strain on existing infrastructure and the concomitant need to budget for yet further infrastructure and connectivity provision to these institutions.

* 1. **Socio-cultural and economic factors**

South Africa has a number of strong NGOs working in the ICT and OER arena. Some, for example SchoolNet SA have forged successful partnership with large corporate companies like Intel and Microsoft to promote the use of ICTs in education. Key role players include:

* The Shuttleworth Foundation’s Siyavula[[2]](#footnote-2) project that supports teachers to work collaboratively to share and develop openly licensed resources under a Creative Commons copyright license, resources which can be printed, adapted to ensure cultural relevance and refreshed freely <https://www.shuttleworthfoundation.org/projects/past/siyavula/> and;
* *Saide’s* (South African Institute of Distance Education) OER Africa initiative which plays a leading role in supporting higher education institutions across Africa in the development and use of Open Educational Resources (OER) to enhance teaching and learning <http://www.oerafrica.org/>
* The [Southern African NGO Network](http://www.ngopulse.org/about) (SANGONeT) has for the past 23 years promoted the development of information communication technologies (ICTs) and continues to serve civil society with a wide range of ICT products and services.
* SchoolNet SA <http://www.schoolnet.org.za> which apart from its ICT implementation strategies in schools, has developed a teacher development framework that has seen its continued leading involvement in the [Educators’ Network](http://www.schoolnet.org.za/teacher-developement/educators-network/what-is-edn/), a distance-based ICT integration educator development programme. SchoolNet SA is also a leading innovator in professional development programmes in ICT integration and school ICT leadership and are the national agency for two multi-national teacher development programmes, [Intel\* Teach to the Future](http://www.schoolnet.org.za/teacher-developement/intel-teach/) and [Microsoft\* Partners in Learning](http://www.schoolnet.org.za/teacher-developement/microsoft-partners-in-learning/).

In the universities, while OER/OA projects initiatives are gaining ground (e.g. OpenUCT, UCT OpenContent, Scholarly communication in Africa, Opening Scholarship) constraints such as insufficient co-ordination, there is a need for JISC-like/SURF-like structure and lack of a direct funding stream for teaching resources (in contrast to research resources) persist.

There are also a number of government and other South African organizations, NGOs and others, that produce and provide free access to their educational resources, even though these are not licensed as OER. These cover a range of offerings including, learning materials, past exam papers, help with research projects, background information on educational matters or a job in teaching. Typically, while including continuing teacher professional development , many of these initiatives target the schooling sub-sector , rather than colleges and universities. Some examples include:

* The Department of Basic Education: Thuthong Educational Portal targeting learners and teachers, [Thuthong Education Portal](http://www.thutong.org.za) offers a wealth of resources on teacher development, curriculum, legislation, educational policy, administration, links to external web resources on the internet and more.
* Mindset delivers free educational material via satellite broadcasts, with supporting multimedia material in print and on the internet. Mindset provides a host of channels, focusing on high school, primary school and health care workers. Video content is broadcast on Mindset Learn to 1 000 high schools and over a million homes in southern Africa via the [DStv platform](http://www.dstv.com) (channel 100).

The Learning Channel: [The Learning Channel](http://www.learn.co.za) Coming out of the educational series aired on SABC television, the Learning Channel offers free downloadable workbooks for matric subjects, as well as interactive video tutorials in a comprehensive list of subjects for sale. There are also a number of useful resources in the archived site.

 [South African History Online](http://www.sahistory.org.za) is a user-friendly site offering alternative perspectives of history, focusing on untold stories and giving learners a chance to construct their own oral histories. The Classroom section has comprehensive content for grades 4 to 12. There's also plenty of information for teachers, and a well-illustrated section on arts and culture.

 Read more: <http://www.southafrica.info/services/education/eduonline.htm#.>

As has been seen above, access to both electricity and reliable broadband connectivity is largely uneven and remains a challenge in South Africa. There are however a number of government and non -government organisations and corporate companies working in the field of ICTs and OER promotion. It has also been noted that whereas not all organisations make their resources available under OER license, there are a number of instances in which educational resources are being made available online and without cost to the end user.

1. **Policy and legal framework for OER adoption**
	1. **National and institutional OER and OER-related policies**
		1. **National policies related to OER**

South Africa has over the last ten years put various ICT and e-learning policies in place which help to create an enabling environment for OER to be accessed and shared, particularly in the higher education or university education sector.

***SANReN***

This is the national broadband connectivity network for public research institutions and universities and it is linked to international networks, such as GeANT.

The current SANReN backbone consists of a 10Gbps ring between the cities of Pretoria, Johannesburg, Bloemfontein, Cape Town, Port Elizabeth, East London and Durban. More than two hundred individual sites in these national centres are connected to the SANReN backbone. The map below illustrates SABReN’s reach.



Source: PowerPoint presentation: Prof Hlengiwe Mkhize, MP Deputy Minister of Higher Education and Training of South Africa [www.dhet.gov.za](http://www.dhet.gov.za)

SANReN has provided universities with faster, more stable and cheaper broadband access and has facilitated networking between various university groupings as well as promoting access to South African and international university libraries.

Connecting various rural based institutions including the TVET (Technical and Vocational Education and Training Colleges) and the Adult Learning Centres is still a priority.

Existing legislation and policy frameworks provide a vision and specific goals for the provision of broadband and e-Education across South Africa, (see below) this has only been partially achieved. Most universities enjoy good broadband connectivity, but this is not the case with other educational sectors in the country, including the schooling sector. It is also not the case for the country as a whole. Connectivity overall is still very uneven. Despite the various underwater cables located down both the East and West Coasts of Africa (Seacom and others) delivery of the “last mile” is still a key challenge.

***The Electronic and Communications Transactions Act 2002***

This 2002 Act was intended to provide for the facilitation and regulation of electronic communications and transactions; to provide for the development of a national e-strategy for the Republic; to promote universal access to electronic communications and transac­tions and the use of electronic transactions by SMMEs; to provide for human resource development in electronic transactions; to prevent abuse of information systems; to encourage the use of e-government services; and to provide for matters connected therewith. [www.doc.gov.za/](http://www.doc.gov.za/)

***South Africa Connect: Creating Opportunities, Ensuring Inclusion – Electronic Communications Policy***

This is South Africa’s latest Broadband Policy and associated strategic plan signed into law in November 2013 in terms of the Electronic Communication Act of 2005 (Department of Communication [DoC]). The *South Africa Connect* Policy is aligned to the vision of the 2030 National Development Plan.

In the executive summary it is noted that “*despite the significant growth in mobile broadband, South Africa’s broadband penetration remains poor compared with other lower- middle income countries”.* It is ranked 61 out of 138 o the network readiness index.It is noted that provision of broadband in South Africa lags behind that of a number of other East and West African countries. Currently broadband pricing in South Africa remains a barrier to development. National government has therefore mandated the DoC’s to coordinate and expedite broad band roll out, particularly prioritising schools and clinics.

It is stated that the Minister (DoC) is to “consider the viability of introducing open access whole scale fibre and wireless broadband networks (p.5 *South Africa Connect: Creating Opportunities, Ensuring Inclusion,* DOC 2013) [www.doc.gov.za](http://www.doc.gov.za)

***White Paper 7 on e-Education: Transforming Learning and Teaching through Information and Communication Technologies (ICT***)

White Paper 7 provides a framework for the provision of ICTs in the schooling sector. The education policy goal was to ensure that by 2013 every South African learner in the schooling system is ICT capable. <http://www.education.gov.za/LinkClick.aspx>

However, by September 2013 statistics released by the Department of Basic Education (DBE) in Parliament reveal that only 6 107 of the country’s 25 870 schools were ICT enabled. Related statistical data shows:

* Only 132 884 of South Africa’s 413 067 teachers had been trained in basic computer skills and ICT equipment by 2011.
* Limpopo and the Eastern Cape’s teachers were the worst off, with only 3% and 9% of them having received such training respectively.
* Gauteng (63%) and the Western Cape (79%) had the highest number of schools that had implemented e-learning and installed ICT infrastructure.

The DBE sites the biggest challenges as being:

* the lack of funding for ICT projects;
* lack of staff trained in ICT;
* limited internet connectivity in rural areas; and
* the high cost of connectivity.

Report by Sipho Masondo, City Press, 1 September 2013 <http://www.citypress.co.za/news/department-admits-it-wont-meet-e-learning-target/>

**2.1.2 National OER policies**

In preparation for the *Southern African OER Policy Forum* co-hosted by the Commonwealth of Learning (COL), UNESCO, DBE and DHET held in Johannesburg, South Africa, May 2013, COL sent out a questionnaire to the 15 countries that make up the Southern African Development Community (SADC) inviting the governments in the SADC region to provide information about their policies in relation to OER.

In response to the question in the questionnaire dealing with OER Strategy/Policy: *Does your education ministry or another public agency in your Country have a strategy or policy on OER?* The South African respondent from DHET (Department of Higher Education and Training) confirmed that the South African government as a whole does not have an OER policy. DHET has however embraced OER Policy but the DBE (Department of Basic Education) that is responsible for the schooling sub sector has not as yet followed suit.

The respondent elaborated DHET’s position as follows:

*DHET is working OER into relevant policies and strategies. We do not envisage that we will have a separate OER policy. The strategy will be to remove barriers to learning that include access to quality teaching and learning materials. Examples are the Green Paper for Post-School Education and Training (which has since been gazetted as the White Paper on Post Schooling – see below) and the draft Policy Framework for the Provision of Distance Education in South African Universities*. (Trudy van Wyk, Director: Career Development and Open Learning, DHET).

To date, no other national government departments have made any commitments to developing policy around OER. However, in line with DHET respondent’s position articulated above, three national education policies advocate the use and promotion of OER to facilitate greater educational access:

* The national *Integrated Strategic Planning Framework for Teacher Education* *and Development* *in South Africa* (2011-2025) (DBE: 2011) commits to ensuring that continuous professional development (CPD) courses ‘will be made available as open source materials’. <http://www.education.gov.za/>
* The national Department of Higher Education and Training *White Paper for Post Schooling[[3]](#footnote-3) Education and Training* (DHET: Nov 2013). Section 7: *Opening Learning through Diverse Modes of Provision* provides for collaborative development of high quality learning programme resources and the release of such learning and teaching support materials (LTSMs) as OER:

*The DHET will support efforts that invest a larger proportion of total expenditure in the*

*design and development of high-quality learning resources, as a strategy for increasing and*

*assuring the quality of provision across the entire post-school system. These resources should be made freely available as open resources. This would be in line with a growing international movement, supported heavily by organisations such as UNESCO and the Commonwealth of Learning, which advocate the development of open education resources. Key motivations for OER are the potential improvements in quality and reductions in cost.*

*The DHET will:*

* *Provide support for the production and sharing of learning materials as open education*

*resources at institutions in the post-school sector. In particular, all material developed by SAIVCET (South African Institute for Vocational and Community Education and Training) will be made available as OER. Other potentially successful initiatives in the area of OER across the post-school education and training sector will be supported.*

* *Develop an appropriate open licensing framework for use by all education stakeholders, within an overarching policy framework on intellectual property rights and copyright in the post-school sector. In particular, the policy framework will seek to address the dissemination, adaptation and usage of education resources developed using public funds.*
* *Acquire electronic resources through the South African National Library and Information Consortium (SANLIC) for the entire sector, to ensure equal access to learning material and information resources.*
* *Encourage the use of open-source software wherever possible, as well as the purchasing of shared software licences by collective entities such as the South African Technology Network and other consortia that may be created makes extensive reference to OER and a commitment to releasing government-funded content under open licences.* www.dhet.gov.za/*‎*
* The national Department of Higher Education and Training has also included the promotion and use of OER in the DHET Draft *Policy Framework on Distance Education in South African Universities* (DHET: May 2012). <http://www.che.ac.za/media_and_publications/documents-interest/dhet-draft-policy-framework-distance-education-south>

This is currently under review by the Council for Higher education (CHE) and is expected to be passed into law by parliament by May 2014.

* + 1. **Regional Policy**

Responses received from 10 of the 15 countries that comprise the SADC region to the OER policy questionnaire administered by COL in May 2013, clearly show that there is currently no OER policy in this region.

There is however a SADC region Open Distance Learning (ODL) policy framework with a set of guideline documents promoting cooperation and collaboration in the field of distance education provision in the region.

* + 1. **The Berlin, Cape Town and Paris Declarations on OER**

None of the South African universities have yet formally agreed and implemented institutional policy on OER. However, three universities are signatories to the Berlin Stellenbosch University (SU) the University of Kwa Zulu -Natal (UKZN) and Rhodes University (RU) are signatories to the **Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities (2003).** <http://www.zim.mpg.de/openaccess-berlin/berlin_declaration.pdf>

As signatories, they **recognise the importance of the global Open Access Movement for the dissemination of knowledge and cultural heritage, and the need to share its research output with the rest of the African continent and the world.**

**As a signatories these universities, commit themselves to:**

* ***Implementing a policy that encourages its researchers to deposit a copy of all their published articles in an open access repository, and***
* ***Encouraging researchers to publish their research articles in open access journals where a suitable journal exists and provide the support to enable that to happen.***

Representatives from four South African Universities: University of Cape Town (UCT) University of the Western Cape (UWC) University of Johannesburg (UJ) and the University of Pretoria (UP) as well as representatives from a range of other South African organisations, including educational NGOs and SAQA (the South African Qualifications Authority) signed the **Cape Town Open Education Declaration (2007).**

The Cape Town Open Education Declaration is one of a number of global Declarations committed to accelerating efforts to promote open resources, technology and teaching practices in education.

On September 14-15, 2007, the Open Society Institute (OSI) and the Shuttleworth Foundation convened a meeting in Cape Town to gather leading proponents of open education. The goal was to seek ways for these initiatives to deepen and accelerate their efforts through collaboration. The participants of the meeting concluded that releasing a declaration of shared vision and common strategies offered a concrete first step towards this kind of collaboration. The Declaration is thus a "statement of principle, a statement of strategy and a statement of commitment”. To date, the Declaration has been signed by 2697 signatories worldwide. <http://www.capetowndeclaration.org/>

#### South Africa was also well represented through the South African Institute for Distance education (*Saide*) OER Africa initiative at the UNESCO, World Open Educational Resources (OER) Congress in Paris (June 2012) during which the OER Declaration was released. The Paris OER Declaration (2012) was formally supported by the South African government through the office of the Minister for Higher Education and Training, Dr Blade Nzimande.

#### This ten point Declaration calls on Governments to openly license publicly funded educational materials.

*“Encourage the open licensing of educational materials produced with public funds.*

*Governments/competent authorities can create substantial benefits for their citizens by ensuring that educational materials developed with public funds be made available under open licenses (with any restrictions they deem necessary) in order to maximize the impact of the investment”.*

Following the Paris Declaration, two key African regional meetings were convened by COL / UNESCO/ and the South African and Kenyan ministries of educations respectively. The main focus of these regional meetings wasto develop proposals for action, building on existing OER foundations to progress the way forward for a sector-wide response to open education in the region.

Thus, while OER policy at government level has not as yet found much traction in South Africa (and indeed on the rest of the African continent) there is evidence that in South Africa the OER movement is being fostered and driven by individual and institutional interest and contribution. This commitment to OER is illustrated in the following section in which various OER related initiatives are described.

1. **OER projects**

**3.1 Organisations and institutions engaged in OER and OER-related work**

**3.1.1 Universities engaged in OER and OER-related work**

***The University of Cape Town (UCT)***

UCT is member of the Open CourseWare Consortium[[4]](#footnote-4) <http://www.ocwconsortium.org/>

[**UCT Open Content**](http://opencontent.uct.ac.za/).

The OER UCT project is run in the Centre for Educational Technology (CET) at UCT with the support of the Shuttleworth Foundation. It aims to showcase the teaching efforts of UCT academics by encouraging the publication of resources as OER. A directory listing the UCT Collection of OER went live in February 2010. All faculty are encouraged to upload their resources to the UCT site and to join the global move to share, remix, improve and

redistribute teaching resources <http://opencontent.uct.ac.za/>

[**Opening Scholarship Programme**](http://www.cet.uct.ac.za/OpeningScholarship)
The main aim is to explore the opportunities that ICTs and open dissemination models could offer for enhanced communication and more effective knowledge dissemination in one South African university, namely UCT. <http://www.cet.uct.ac.za/OpeningScholarship>

*The Scholarly Communication in Africa Programme (SCAP)* <http://www.scaprogramme.org.za/>

*SCRAP* was a research and implementation initiative aimed at increasing the visibility and developmental impact of a spectrum of research outputs from universities in Southern Africa. It was funded by the International Development Research Centre (IDRC) and ran from March 2010 to August 2013.

The programme was jointly hosted by the Centre for Educational Technology (CET) and the Research Office at the University of Cape Town. It engaged in four study sites which were cross-disciplinary and cross-faculty in nature:

* The Department of Library and Information Studies (DLIS) at the university of Botswana;
* The Southern African Labour Development Research Unit, a research unit in the School of Economics at the University of Cape Town;
* The Faculty of Science (FoS) at the University of Mauritius;
* The Faculty of Humanities and Social Sciences at the University of Namibia.

The programme was composed of two components: a research strand utilising Cultural Historical Activity Theory (CHAT), divided into four research strands; and an implementation component, which sought to simulate scholarly communication activity in each of the four study sites to facilitate institutional engagement with research communication as well as profile a portion of each study site’s research.

Final outputs include:

* Institutional case studies
* Briefing documents
* Working papers
* The Eve Gray site: *Gray Area* which comprises:
* Various blogs about OER
* A range of resources pertaining to African scholarship, OER policy , and research
* Publications – including journal articles and reports

These can all be access at: <http://www.gray-area.co.za/>

[Signatory of the Cape Town Open Education Declaration](http://www.capetowndeclaration.org/)

The UCT health OER project exemplifies the kind of ORE initiative undertaken at UCT.

*UCT Health OER Project*

The Health OER team supports academics in OER development. It has been working on publishing existing course material to an online and accessible OER format as well as assisting faculty with creating new material as OER for teaching and learning.

The UCT website <http://www.healthedu.uct.ac.za/elearning/healthoer/> states that project plans include the release of a neurological examination teaching video for third-year students, case studies in from Digital Pathology, and a visual, interactive key which teaches students about human rights and health.

UCT has participated in the Health OER Network since 2009. The completed resources are posted on the [UCT OpenContent](http://opencontent.uct.ac.za/) website (as well as the Health OER Network spaces on [OER Africa](http://www.oerafrica.org/) and [Open.Michigan](https://open.umich.edu/education/med/oernetwork/). A page of other repositories with Health OER content has been created at [http://www.tinyurl.com/healthoerwiki](https://vula.uct.ac.za/portal/tool/8c761ab5-d7d6-49cf-9bdc-e774d79b3702?pageName=%2Fsite%2F9c29ba04-b1ee-49b9-8c85-9a468b556ce2%2Fhome&action=view&panel=Main&realm=%2Fsite%2F9c29ba04-b1ee-49b9-8c85-9a468b556ce2).

Ten new resources were published by early 2012 these include:

* *Teaching material from 7 postgraduate courses: Occupational Medicine and Toxicology, Occupational Health Services Management, Sociology of work and industrial relations, Environmental Health, Clinical Physiotherapy, a Clinical Educator’s Course and Pesticide Risk Management*
* *Two (2)  websites:  Dealing with Abuse in Women’s Health and Health and Human Rights*
* *A collection of digital pathology images.*

***University of the Western Cape (UWC)***

UWC is member of the Open CourseWare Consortium

*Free Course ware project*

UWC has a long history of supporting the use, development and diffusion of free/open source software and educational resources. In 2005 UWC's Senate passed an ambitious [Free *Co*ntent, Free/Open *Co*urseware Policy](http://ics.uwc.ac.za/usrfiles/users/8990060109/Strategies/freecourse-0.4.pdf), which removed institutional obstacles to publication of open educational resources. The Free Courseware project is part of a broader move towards implementation of this strategy.

<http://freecourseware.uwc.ac.za/>

[Signatory of the Cape Town Open Education Declaration](http://www.capetowndeclaration.org/)

***University of KwaZulu-Natal (UKZN)***

The OPEN ACESS landing page in the UKZN Website links to a range of OER Repositories, OER Text Books and OER Journals specialising in academic content. Links are also made to generic information about OER and the OER movement. It however does not appear that any of UKZN’s own courses/ material are up loaded on this site. <http://libguides.ukzn.ac.za/content.php?pid>

 *UKZN Advanced Certificate in Teaching*

 The South African Institute for Distance Education (*Saide*) has been commissioned by UKZN to provide capacity building expertise and assistance in materials development to support the design and delivery of the new *Foundation Phase Advance Certificate in Teaching* which is planned for a mixed mode delivery. When completed, later in 2014, UKZN is committed to releasing the programme material as OER.

***University of the Witwatersrand (Wits)***

*An Enabling Strategy for Free and Open Educational Resources at the University of the Witwatersrand (2011)*

This strategy attempts to create an enabling environment for Wits academics, students and other staff to participate in the use, adaptation, creation, and sharing of educational and research resources as free and open educational resources (FOER). The strategy provides examples of content types and recommends appropriate Creative Commons licenses for use when choosing to create FOER. In addition, the strategy provides for an open access institutional repository (IR) for research output, and provides means for researchers to add their papers to the IR. It also provides for the establishment and maintenance of a repository for academic presentations. <http://libguides.wits.ac.za/content.php?pid=297227&sid=4305007>

*WIREDSPACE: Institutional Repository and Research Archive*

[WIReDSpace](http://wiredspace.wits.ac.za) is the Institutional Repository and Research Archive of Wits University which showcases Wits research on the global stage via an Open Access Platform.

Wiredspace contains lecture notes and course ware from awide range of faculties and schools at Wits.

*Signatory to the Berlin Declaration on Open Access to Knowledge in the Sciences and humanities*

On 9 November 2012, Wits signed the [Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities,](http://oa.mpg.de/files/2010/04/berlin_declaration.pdf) http://oa.mpg.de/files/2010/04/berlin\_declaration.pdf

Wits reports using the ACE Maths, Maths for Primary School Teachers and DIPIP Assessment from the OER Africa ([www.oerafrica.org](http://www.oerafrica.org)) in the delivery of the B.Ed for primary school teacher education programme. Some although units have been used in honours and masters presentation lectures as well. It was noted that the OER materials were used in hard copy (downloaded and printed) and not used in their electronic format.

***University of Pretoria (UP)***

On 18 February 2014 the first veterinary online open educational resources platform in Africa – the African Veterinary Information Portal (AfriVIP) was launched at the Onderstepoort Campus of the University of Pretoria

AfriVIP has been developed under an open licensing framework as an online portal of information, educational and research resources and continuing professional development opportunities for veterinary, paraveterinary professionals and students. The portal has been developed by the following partners: Faculty of Veterinary Science, University of Pretoria, Afrivet, World Health Organisation for Animal Health (OIE) Collaborating Centre for Training in Integrated Livestock and Wildlife Health and Management, OER Africa, Institute of Tropical Medicine, Antwerp, Belgium and Neil Butcher & Associates.

The objective is to draw together the substantial intellectual capital, information and research and educational materials on uniquely African matters through a network of faculties of veterinary science and veterinary associations working in Africa and further afield.

 ***Stellenbosch University***

[**Funds for Open Access**](http://blogs.sun.ac.za/news/2011/09/20/stellenbosch-university-funds-open-access/)
In 2011 Stellenbosch University Library and Information Service created an Open Access Fund to support Stellenbosch University researchers publishing in open access journals. Motivated by the challenges that have plagued Africa in developing processes for the distribution of research, Stellenbosch University has developed the *African Open Access Repository Initiative* (AOARI). AOARI is a ‘hyper repository’ for African academic and research institutions to share their scholarly literature with the widest audience possible. AOARI is split into two platforms to ignite, nurture and grow the support for publishing in both the green (that is, publishing in a repository) and gold (that is, publishing directly in a journal that is available via open access) open access routes. In keeping with the principle of ‘openness’, it uses open source software for both the platforms. The operating system used for both the platforms is Ubuntu. DSpace is used for the repository platform and the latest version of Open Journal Systems (OJS) for the gold route publishing platform.

Stellenbosch University’s AOARI platforms can be accessed at <http://ar1.sun.ac.za/>

This repository is a digital service that collects, preserves, and distributes research related digital material, for African higher education institutions that do not have the technological capacity to do so at present, for the very long term.

 ***University of South Africa (Unisa)***

UNISA is a dedicated distance education institution. It is considered a “mega-university”, and with over 360,000 students enrolled it is one of the biggest universities in the world.

OER at Unisa <http://www.unisa.ac.za/default.asp?Cmd=ViewContent&ContentID=27755>

Unisa approved its OER Strategy that is intended to guide the institution in terms of its use of OER, licensing of teaching and learning materials, and the management of its intellectual property in May 2014. The five priority areas identified are:

* Development of an effective management system for intellectual property
* Establishment of an open licensing framework.
* Systematic integration of high quality, available OER as appropriate into courses and their subsequent release for use by others.
* Contribution to the global OER repository of resources
* Evaluation and review of institutional policies to incorporate OER values and processes

Source: [www.unisa.ac.za/oer](http://www.unisa.ac.za/oer)

Other Unisa strategies, policies and plans that are in place which are conducive to embracing OER include the following:

* [**Institutional Operational Plan 2012-2013**](http://www.unisa.ac.za/contents/unisaopen/docs/Unisa%20Institutional%20Operational%20Plan%202012-2013.pdf%20)
* [**Curriculum Policy (November 2010)**](http://www.unisa.ac.za/contents/unisaopen/docs/CurriculumPolicy%20%28November%202010%29.pdf)
* [**Implementing the Unisa Curriculum Policy (November 2011)**](http://www.unisa.ac.za/contents/unisaopen/docs/Implementing%20the%20Unisa%20curriculum%20policy%20%28November%202011%29.pdf)
* [**ICT-enhanced teaching and learning strategy 2011-2015**](http://www.unisa.ac.za/contents/unisaopen/docs/ICT-enhanced%20teaching%20and%20learning%20strategy%202011-2015.pdf%20)

These four documents make provision for the prescription of OER for modules, the use of open licensing, the creating of a portal to showcase Unisa OER, support sourcing and evaluating OER for use as well as for providing support and tools to use and develop OER.

*Unisa Open* is a portal to help students, staff and any OER users and producers worldwide to [source](http://www.unisa.ac.za/default.asp?Cmd=ViewContent&ContentID=27969) resources. It provides a space for [conversation](http://www.unisa.ac.za/blogs/index.php/category/unisa-open/) and a starting point for those just making their acquaintance with OER. It also provides a [showcase](http://www.unisa.ac.za/default.asp?Cmd=ViewContent&ContentID=27967) for the OER work being conducted at Unisa. This website serves as a reference to some of the key OER available to illustrate the type of resources currently in existence.

Examples of OER course ware include:

* College of Agriculture - Household Food Security programme designed collaboratively with *Saide.*
* College of Economic and Management Sciences – Video tutoring resources
* College of Human Sciences – Courses in various South African indigenous languages

[Unisa OpenCourseWare](http://www.unisa.ac.za/default.asp?Cmd=ViewContent&ContentID=27967)

The Unisa College of Education integrates TESSA (Teacher Education in Sub Saharan Africa) materials into its teaching practice modules. TESSA is a research and development initiative creating open educational resources (OERs) and course design guidance for teachers and teacher educators working in Sub-Saharan African countries. This initiative is discussed in more detail see University network projects below.

*The institutional Repository* [Institutional repository](http://uir.unisa.ac.za/)

It contains various collections including articles and material released as OER by the Unisa colleges of Human Science (2944 items) Education (755 items) Economic Management (909 items) and Agriculture (142 items).

[**African Digital Library**](http://www.africandl.org.za/)
The aim of establishing the African Digital Library was to enable the users of Africa to access a public digital library at no cost. It was a developmental project aimed at assisting the less developed regions of the world where basic access to books is limited.

Unisa and *oer4schools* at the University of Cambridge are working collaboratively to develop a new Advanced Diplomas in Education for Maths and Science Education.

To take Unisa’s OER agenda forward, an OER champion has been appointed to the Pro Vice Chancellor’s office, Kerry de Hart, whose job it is to promote OER integration and who is developing policy towards open licensing become the institutional default.

**3.1.2 Other Institutions engaged in OER and OER-related work**

***Saide OER Africa***[www.oerafrica.org.za](http://www.oerafrica.org.za)

*OER Africa* is an initiative established by the South African Institute for Distance Education (*Saide)* (www.saide.org.za) to play a leading role in driving the development and use of OER across all education sectors on the African continent. While *Saide* is based in Johannesburg, South Africa, its OER office operates out of Nairobi in Kenya.

*OER Africa* focuses in particular on three areas of development, health, agriculture and education. To maximize impact, OER Africa facilitates the establishment of institutional networks for collaboration and sharing across various regions in Africa. Projects and networks established in the three areas identified are elaborated under section 4 below.

The core work of *OER Africa* is made possible by the support of the William and Flora Hewlett Foundation.

***Siyavula – Shuttelworth Foundation*** <http://www.shuttleworthfoundation.org/projects/past/siyavula/>

Siyavula is a project to support teachers to work collaboratively to share and develop openly licensed resources under a Creative Commons copyright license, resources which can be printed, adapted to ensure cultural relevance and refreshed freely without the barriers associated with the vast majority of material which is under a traditional, restrictive copyright licence.

Siyavula works with teachers and partners to support the online community in the sharing of knowledge and resources to save teachers time and allow them to focus on delivering quality education. To achieve this, Siyavula has partnered with open education resources pioneer, [Connexions](http://www.cnx.org/), to extend their education portal to serve as the foundation for Siyavula’s community of educators.

To ensure that educators can fully harness the power of the knowledge portal, Siyavula has also partnered with [Edunova](http://www.edunova.org/) and a team of expert community facilitators, so that teachers gain maximum benefit from the support team and portal.

School text books developed by Siyavula and released under OER license are now included on the Department of Basic Education (DBE) list of approved text books together with the other texts books produced by regular publishing houses. The DBE as agreed to print the Siyavula text books through the government printer for those schools selecting to use the Siyavula publications.

**3.2 OER Projects or initiatives at the regional, national and institutional level, including but not limited to:**

* + OER development and/or aggregation into repositories
	+ Awareness-raising and network-building activities
	+ Capacity-building programs (e.g. workshops, courses)

Projects and OER related activities in this section reflect a range of collaborative initiatives in which South Africa participated with various other countries in Africa or elsewhere. In some instances the South African institution was the project facilitator, while in other it was one of the collaborating partners.

**3.2.1 South African participation in the COL/UNESCO Africa Open Educational Resources Forum**

South Africa was one of 15 African states that participated in the *Africa Open Educational Resources Forum*. Representatives from South Africa included: the Department of Higher Education and training (DHET) the South African Institution for distance Education (*Saide*) and the University of South Africa (UNISA) that also hosted the Forum (February 2012).

The Forum, organised by the Commonwealth of Learning (COL) and UNESCO was convened to provide African inputs into the drafting process of the Paris Declaration which was subsequently launched at the UNESCO World OER Congress in Paris June 2012

<http://www.unesco.org/new/en/education/resources/online-materials/single-view/news/africa_open_educational_resources_forum_ended_in_pretoria/#.UoIDkflmiSo>

**3.2.2 University networks/collaborative OER projects involving two or more institutions**

***The CHEPSAA multi institutional project including UCT, UWC and Wits***

This project has as its main aim the strengthening of capacity to produce and use quality research in the health sector and forms part of the OER pilot Health Project. The project involves the collaboration of 12 universities, 3 from South Africa – UCT, UWC and Wits, 4 other universities from sub- Saharan Africa and 4 from Europe. (See the list of partners below). All Health Policies and systems resources are released under the Creative Commons2.5 Share Alike License on the CHEPSAAwebsite <http://www.hpsa-africa.org/>

*Project description*

The development of sustained African health policy and systems research and teaching capacity requires the consolidation and strengthening of relevant research and educational programmes as well as the development of stronger engagement between the policy and research communities. The Consortium for Health Policy and Systems Analysis in Africa (CHEPSAA) will address both of these issues over the period 2011 - 2015.

CHEPSAA’s goal is to extend sustainable African capacity to produce and use high quality health policy and systems research by harnessing synergies among a Consortium of African and European universities with relevant expertise. This goal will be reached through

CHEPSAA’s five work packages:

* assessing the capacity development needs of the African members and national policy networks;
* supporting the development of African researchers and educators;
* strengthening courses of relevance to health policy and systems research and analysis;
* strengthening networking among the health policy and systems education, research and policy communities and strengthening the process of getting research into policy and practice;
* project management and knowledge management.

The CHEPSAA project is led by Lucy Gilson (Professor: University of Cape Town & London School of Hygiene and Tropical Medicine).

*Partners*

* Health Policy & Systems Programme within the Health Economics Unit, University of Cape Town, South Africa
* School of Public Health, University of the Western Cape, South Africa
* Centre for Health Policy, University of the Witwatersrand, South Africa
* Institute of Development Studies, University of Dar es Salaam, Tanzania
* School of Public Health, University of Ghana, Legon, Ghana
* Tropical Institute of Community Health, Great Lakes University of Kisumu, Kenya
* College of Medicine, University of Nigeria Enugu, Nigeria
* London School of Hygiene & Tropical Medicine, United Kingdom
* Nuffield Centre for International Health and Development, University of Leeds, United Kingdom
* Karolinska Institutet, Sweden
* Swiss Tropical and Public Health Institute, University of Basel, Switzerland

# *UNISA Advanced Diploma in Education (ADE) Project with* *Centre for Commonwealth Education, Faculty of Education, Cambridge University, UK*

The UNISA ADE project is a joint teacher education project between UNISA (University of South Africa) and the Centre for Commonwealth Education (CCE) in the Faculty of Education, Cambridge University, UK. The CCE are collaborating with various UNISA ADE teams led by Professor Callie Loubser on the Development of 'Advanced Diplomas in Education' in mathematics, science, ICT integration within education and inclusive education.

*OER4Schools*

This project started in August 2009 and ran through three phases of engagement into 2014. It has culminated in a professional learning resource for teachers and student teachers, focussing on interactive teaching and learning in science and mathematics - with and without ICT. A key element of this resource is the use of unique video clips illustrating interactive practice (produced in Zambian and South African primary classroom contexts) as a stimulus for discussion.

*Creative Commons License*

To contribute to addressing educational challenges across sub-Saharan Africa, all ADE materials developed are made available as OER under a Creative Commons license, facilitating world-wide re-use without copyright restrictions, and ensuring effective use of financial and other resources. The resources support different modes of learning, including collaborative and individual use, as well as blended learning as part of a course.

The resource is available in a number of formats, appropriate to the varied African environments in which teachers find themselves. It is being embedded in various teacher education and professional development courses administered by teacher colleges and universities in Zambia and elsewhere in sub-Saharan Africa; and "taster workshops" have been run successfully with lecturers and students in three higher education settings. The resource can be accessed at: <http://oer.educ.cam.ac.uk/wiki/OER4Schools>

 ***OER University: Unisa founding member and the North West University an anchor member***

Unisa is also a founder member of [the OER university](http://wikieducator.org/OER_university) (OERu) project and the North West University (NWU) an anchor member. As part of the collaboration Unisa is developing one of the prototype courses [Critical Reasoning](http://wikieducator.org/OER_university/Planning/OERu_2012_Prototype/Critical_Reasoning/Design_blueprint) to be launched as part of OERu in the second half of 2012. Please feel free to browse the site and contribute to the [discussion](http://wikieducator.org/OER_university/Planning/OERu_2012_Prototype/Critical_Reasoning/Design_blueprint) and work being done at OERu.

The OER university is a virtual collaboration of like-minded institutions committed to creating flexible pathways for OER learners to gain formal academic credit. <http://oeruniversitas.org/>

***OER Africa collaborative projects***

OER Africa has established collaborative networks among African higher education institutions in three focus areas:

1. Agriculture
2. Education
3. Health

 A few projects have been selected by way of illustration, please see the OER Africa website [www.oerAfrica.org](http://www.oerAfrica.org) full details of collaborative projects and available OER.

***African Teacher Education Network (ATEN)***

ATEN is a project of OER Africa. Its focus is on identifying existing high quality teacher education resources that can be shared under an open licence and then facilitates the process of publishing these on the *OER Africa* ATEN website.

ATEN also seeks to encourage the development of collaborations and sharing that can be sustained without necessarily requiring the direct support of *OER Africa*. The formation of the interest groups is a step in this direction.

Key collaborating institutions include **Unisa (South Africa)** Chalimbana University (Zambaia) and Mkwawa University College of Education (MUCE) in Tanzania.

Tony Mays of *Saide* is responsible for the ongoing process of locating existing resources and sharing them as OER and for promoting and coordinating all ATEN activities*.*

[www.oerAfrica.org](http://www.oerAfrica.org)

***Health OER – Inter institutional***

The overall goal of this project is to develop a sustainable and scalable model for the systematic rollout of OERs to support health education on the continent. Universities from South Africa and Ghana have collaborated on this project <http://www.oerafrica.org/healthoer>

Ghana
• Kwame Nkrumah University of Science and Technology (KNUST)
• University of Ghana

South Africa
• University of Cape Town
• University of the Western Cape

***Other Saide Projects***

* *Saide's****African Storybook Project*** - an initiative to stimulate the provision and use of openly licensed stories in local African languages for early reading. The project will conduct pilots in rural and urban sites across Kenya, Uganda, Lesotho and South Africa - See more at: <http://www.saide.org.za/african-storybook-project>
* *Saide* was responsible for facilitating the development of the ***South African Advanced Certificate in Education for School Management and Leadership*** – a national programme for the training of school principles. The whole programme qualification was originally published as an OER. The programme as a whole, as well as arts of it have been used in a number of other projects and in other parts of the world (including the Pacific islands). <http://www.education.gov.za/Principals/ACE/tabid/425/Default.aspx>

Currently the Department of Basic Education is in negotiation with *Saide* and a range of other stakeholders to develop and update the programme and resources which again integrate OER and be shared back as OER.

* **TESSA** (Teacher Education in Sub-Saharan Africa) operates as a network of national and international organisations lead by the Open University UK. For more about the project and to view resources see <http://www.tessafrica.net/>

It is a research and development initiative creating OERs and course design guidance for teachers and teacher educators working in Sub-Saharan African countries. It has produced a range of materials and resources in four languages (English , French Kiswahili and Arabic) to support school based teacher education and training.

In South Africa, TESSA has established partnerships with the [University of Fort Hare,](http://www.ufh.ac.za/) [University of Pretoria](http://web.up.ac.za/), Unisa and *Saide.* The institutions contribute variously to advocacy, research and adaptations/versioning of resources. Fort hare in particular, is committed to translating these materials into IsiXhosa.

* The Cape Consortium comprises Rhodes University (RU), Nelson Mandela Metropolitan University (NMMU) Walter Sisulu University (WSU) and the University of the Western Cape (UWC) supported by *Saide.* The Consortium is currently working **collaboratively to design and develop Foundation Phase materials for grades 1-3 for the Bachelor of Education (BEd)** qualification to be offered by all 16 universities that offer this programme in South Africa.

This project is coordinated by DHET’s and funded by the European Union (EU). In line with EU funding conditions these materials were to be made available as OERs. To this end *Saide* worked with DHET to develop an OER protocol. Unfortunately, DHET failed to engage the 16 Universities in this regard and as a consequence many of the participating institutions were unaware of this requirement. When they were informed of this intension late in the developmental process, many of them had reservations about making these materials available as OERs.

Additionally, proper protocols regarding various permissions, especially those pertaining to the use of photographic images and video footage, were not followed as these were not factored into the initial DHET project planning process. As a result an impasse has been reached and instead of being released under a Creative Commons BY license, the materials will be mounted on a DHET website and will be pass word protected with access only made available to the 16 participating universities. The implementation of the BEd is planned for 2015.

* **Advanced Certificate in Education - Maths** The aim of the *Saide* facilitated ACE Maths project was to pilot a collaborative process for the selection, adaptation and use of OER materials for teacher education programmes in South Africa. Over a period of two years *Saide* adapted, piloted and revised a set of materials on the teaching and learning of maths for teacher education. The following universities were involved in the collaborative development of various modules and have driven the implementation of this programme: university of the Witwatersrand, University of Fort Hare, University of KwaZulu natal and Unisa. <http://www.oerafrica.org/african-teacher-education-oer-network-aten/acemaths>
1. **Research on or related to OER conducted in South Africa or by South African Researchers**

##  Introduction

Key South African universities and institutions organisations involved in the implementation of various OER initiatives and research in South Africa include:

* The Centre for Educational Technology (CET) at the University of Cape Town (UCT),
* University of the Western Cape (UWC),
* University of South Africa (UNISA),
* Meraka Institute which is an Unit of the Council for Scientific and Industrial Research (CSIR),
* South African Institute for Distance Education (*Saide*) a non- government organisation (NGO) focusing on the promotion of access and quality in education
* Neil Butcher and Associates (NBA) a for profit consultancy,

The desktop review shows that much of what is happening in OER research in these institutions/ organisations is linked to the implementation of specific institutional OER projects.

The following sections show research that has been conducted on OER by the afore-mentioned organisations in South Africa as well as research conducted outside South Africa by South African researchers.

##  Research conducted by the University of Cape Town (UCT)

## The Opening Scholarship Project

UCT has an interesting OER initiative called Opening Scholarship. This project was established in July 2007 and is hosted by the Centre for Educational Technology (CET) at the University. This initiative is funded by the [Shuttleworth Foundation](http://wiki.tsf.org.za/) and its main aim is to explore the opportunities that ICTs and open dissemination models can offer for enhanced communication and more effective dissemination of knowledge at UCT.

[[5]](#footnote-5)The OpeningScholarship project seeks to explore how UCT is responding to the use of ICTs, new communication channels and open and collaborative approaches for knowledge dissemination within the university community, nationally and internationally. Although the project has an ICT focus, OER is a significant component of the project activities. This includes generating research papers and holding seminars on OER in order to familiarize UCT staff with principles of open sharing as one of the ways of responding to the learning needs of students in a digital age. As Gray, Hodgkinson-Williams & Willmers (2009) write:

In the sphere of teaching the adoption of open educational resources (OER) on an institution-wide scale by universities such as MIT[[6]](#footnote-6), Open University[[7]](#footnote-7), Johns Hopkins Bloomberg School of Health[[8]](#footnote-8), University of Oxford[[9]](#footnote-9), Harvard University[[10]](#footnote-10) and the University of Michigan[[11]](#footnote-11) demonstrates how the use of ICTs can extend the influence on universities on the broader community, present new opportunities for digital learning communities and offer additional prospects for collaboration between institutions.

The same authors cited above argue that while the actual definition of openness is still evolving and extending to different contexts like media, education, workplace design, philanthropy and public policy, three current initiatives are at the heart of the emerging ‘open movement’, namely open source software (OSS), open access and open educational resources (OER). Although no specific research report linked to the Opening Scholarship project could be found, there is likely to be much research activity going on at UCT around open access in general and OER in particular.

Another study on OER is jointly reported by Ng’ambi, an academic at the CET and two other researchers from the University of Michigan. Luo, Ng’ambi and Hanss[[12]](#footnote-12) acknowledge the value of OER in education but express pessimism regarding the sustainability of these resources. In their report, they observe that although there are over a quarter of a million open courses published by an increasing number of universities, it remains unclear whether Open Educational Resources (OER) are scalable and productively sustainable. [[13]](#footnote-13)These authors argue that the challenge is compounded when OER is examined in the light of its potential to allow both educators and learners in developing countries to contribute geographically bound learning resources in the context of varied infrastructural, technological and skill constraints.[[14]](#footnote-14)

In their quest for a model that will promote the sustainability of OER, the authors conducted a study amongst 52 participants involved in various roles related to Health OER from five universities (one in the USA, two in Ghana and two in South Africa). They interviewed these 52 respondents between October and December 2009. The aim of the study was to investigate sustainability of OER based on possible cross-institutional collaboration as well as social and technical challenges faced in creating and sharing OER materials. The analytical framework was adopted from prior research in related areas: distributed scientific collaboration; cyber infrastructure; open source development; and Wikipedia. [[15]](#footnote-15) The authors argue that the framework drawn from previous research provided them an appropriate analytical tool to examine what leads to the success of distributed collaboration amongst the studied Health OER institutions. The researchers adopted a qualitative approach for data collection, which included semi structured interviews and document analysis. The findings were analyzed and reported with many direct quotations included. The outcome of the data analysis, they argue, “… is a model for productive, scalable, and sustainable OER based on cross-institutional collaboration”.[[16]](#footnote-16) The report concludes with practical recommendations on how the model can be operationalized.

The following is a summary of the recommendations the authors give in order to increase productivity, achieve scalability and sustainability of Health OER:

* Create interest groups for various work roles in OER production
* Foster a culture of sharing.
* Develop an information and communication technology Inventory.
* Conduct an analysis of local infrastructure for OER.
* Focus OER development on unique and local expertise.
* Assign a Health OER project manager.

**Authors:** Laura Czerniewicz (CET, UCT) andother key international researchers and academics in the field of OER (See Reference below).

**Date:** 2014

**Research journal article:** “*Bottlenecks in the Open-Access System: Voices from Around the Globe”,*

**Abstract:** The focus of the research is an investigation into the phenomenon of bottlenecks in accessing and using OER. The study spans four continents and multiple disciplines in the natural sciences, humanities, and social sciences, as well as diverse political and economic situations. Based on the diverse experiences of this wide spectrum of authors, the paper challenges the limitations of one of the open access publishing models, the author-pays model. It further argues that the author-pays model places authors from low income countries at the periphery of knowledge dissemination through open access publishing because of the need to pay publication fees from their pockets, instead of from grant funds, as is the case with publishers in the high income countries. The argument from the study is that the requirement for authors in developing countries to pay subscription for publishing constrains release of content produced by academics in these countries as OER.

**Source:** Journal of Librarianship and Scholarly Communication. <http://dx.doi.org/10.7710/2162-3309.1126>.

**Author:** Monica Mawoyo

**Date:** 2012

**Research:** *Growing an Institutional Health OER Initiative: A Case Study of the University of Cape Town*

**Abstract:**The faculty of Health Sciences at the University of Cape Town (UCT) was involved in a pilot project to develop health Open Educational Resources (OER). This initiative began in 2008 as part of OER Africa, an initiative of the South African Institute for Distance Education (Saide) which involved other institutions in Africa, namely, University of Ghana, Kwame Nkrumah University of Science and Technology, and the University of the Western Cape. The project was funded by the William and Flora Hewlett Foundation and the University of Michigan and OER Africa co-managed the Hewlett Foundation grants and provided technical support to the four institutions.

Through this project, the UCT Faculty of Health Sciences conducted a study on OER project implementation in the Faculty. The study involved conducting semi-structured interviews and email engagement with teaching and support staff involved in OER activities in the Faculty of Health Sciences and the OpenContent Directory at UCT. These interviews and analysis of email interactions culminated in a comprehensive:

Case study which describes the Faculty of Health Science’s experience with OER, locating it within the UCT OER context and highlighting strategic priorities, perceived benefits, achievements, challenges, production processes, lessons learned, future plans, and advice for others interested in creating their own institutional OER initiatives.[[17]](#footnote-17)

**Source:** This case study is available on the following website: <http://www.healthedu.uct.ac.za/usr/edu/downloads/uctcasestudyfinal.pdf>

## Author: Eve Gray (Associate CET UCT)

**Date:** 2006

Research issue paper: Achieving *Research Impact for Development: A Critique of Research Dissemination Policy in South Africa* (prepared as part of the international policy fellowship 2006: open information group research publication policy and development goals In South Africa: the potential for open access).

**Abstract:** This paper reviews the policy context for research publication in South Africa, using South Africa's relatively privileged status as an African country and its elaborated research policy environment as a testing ground for what might be achieved ~ or what needs to be avoided - in other African countries. The policy review takes place against the background of a global scholarly publishing system in which African knowledge is seriously marginalised and is poorly represented in global scholarly output. Scholarly publishing policies that drive the dissemination of African research into international journals that are not accessible in developing countries because of their high cost effectively inhibit the ability of relevant research to impact on the overwhelming development challenges that face the continent**. In this study, South African research policy is tracked against the changing context provided by digital communication technologies and new dissemination models, particularly Open Access.** These impact not only on publication but also on the way that research is carried out and they bring with them a growing recognition of the value, particularly for developing countries, of non-market and non-proprietary production in delivering research impact. The paper thus pays particular attention to the potential for new technologies and new publishing models in helping to overcome the global knowledge divide and in offering solutions for what might at first sight appear to be intractable problems of under-resourcing and a lack of sustainability for African research publication.

The argument of the paper is that there is, in the formulation of research policy, a largely uncharted clash between South African national research and innovation policies focused on development and access on the one side, and the traditionally-accepted model of academic publishing on the other. The traditional publishing model has, as its core value, enhancement of the reputation of the individual scholar and his or her institution. In following this model, South Africa is typical: there is a signal failure of research policy to focus on the question of the swift dissemination of research results, **through Open Access publishing**, especially to places where these results could have a useful impact caused by a set of largely unexamined assumptions about academic publishing. It is in the developing world, and perhaps most markedly in Africa, that the negative effect of this set of contradictions is demonstrated most clearly.

The paper makes recommendations at international, national and institutional levels for addressing this situation, arguing that **Open Access** and collaborative approaches could bring substantially increased impact for African research, with marked cost-benefit advantages.

**Source:** **http://www.policy.hu/gray/**

##  Blog dealing with OER issues: Eve Gray has a blog dealing with a range of OER issues and some links to journal articles which can be accessed at: http://[www.gray-area.co.za](http://www.gray-area.co.za)

**Authors:** Cheryl Hodgkinson-Williams and Eve Gray (UCT)

**Date:** 2008

**Title:** *Paradox and Promise and Problem: A Social Realist View of the Potential for OER a t the University of Cape Town -* Proceedings of the 3rd International Conference on e-Learning edited by Dan Remenyi.

**Abstract:** This paper reports on a study undertaken at the University of Cape Town and reviews how ICTs are used to enhance teaching and learning and what the possible drawbacks and advantages are of sharing OER beyond the staff and students of UCT

**Source:** <http://books.google.co.za/books?id=qsswThitjp0C&pg=PA209&lpg=PA209&dq=Cheryl+Hodgkinson-William+research+on+OER>

The following articles by Cheryl Hodgkinson – Williams can be found on *ResearchGate,* a free access social networking site for scientists and researchers to share papers, ask and answer questions, and find collaborators.

**Authors:** Cheryl Hodgkinson-Williams, Eve Gray, Michelle Willmer**s**

**Date:** 09/2009

**Article:** *The Opening Scholarship Project: Executive Summary*

**Source:** <http://www.researchgate.net/profile/Cheryl_Hodgkinson-Williams/publications>

**Author:** Cheryl Hodgkinson-Williams

**Date:** 09/2009

**Article:** *Institutional Report 2 Sketching the terrain: Open educational resources for teaching and learning at the University of Cape Town*

**Source:** <http://www.researchgate.net/profile/Cheryl_Hodgkinson-Williams/publications>

**Author:** Cheryl Hodgkinson-Williams, Eve Gray

**Date:** 01/2009

**Article:** *Degrees of Openness: The emergence of Open Educational Resources at the University of Cape Town*

**Source**: <http://www.researchgate.net/profile/Cheryl_Hodgkinson-Williams/publications>

**Author:** Cheryl Hodgkinson-Williams

**Date:** 2010

**Paper:** *Benefits and Challenges of OER for Higher Education Institutions* - A paper was commissioned by the Common wealth of Leaning (COL)

**Abstract:** This paper focusses on issue pertaining to quality assurance in OER and highlights the Connexions project’s ‘lens’ system which enables organisations and individuals to give their stamp of approval to content on an OER site. The paper also examines a range of issues around financial sustainability of OERs.

**Source:** <http://www.col.org/SiteCollectionDocuments/OER_BenefitsChallenges_presentation.pdf>

**Authors:** Hodgkinson-Wiliams, Cheryl; Donnelly, Shihaam

**Date:** 2010

**Title:** *Sustaining OER at the University of Cape Town: Free, but not cheap.* In Open Ed 2010 Proceedings. Barcelona: UOC, OU, BYU.

**Abstract:** This paper reviews the range of sustainability strategies mentioned in the literature, plots the results of a small-scale OER sustainability survey against these strategies and explains how these findings and other papers on OER initiatives were used to inform an in-house workshop at UCT to deliberate the future strategy for the sustainability of OER at UCT.

**Source:** http://hdl.handle.net/10609/4843

**Authors:** Hodgkinson-Williams, Cheryl and Michael Paskevicius

**Date:** 2012

**Title:** *The Role of Post-Graduate Students in Co-authoring Open Educational Resources to Promote Social Inclusion: A Case Study at the University of Cape Town.*

**Source:** Distance Education vol. 33, no.2, August 2012.

 **Authors:** Cheryl Hodgkinson-Williams, Michael Paskevicius, Glenda Cox, Shihaam Shaikh, Laura Czerniewicz and Samantha Lee-Pan, University of Cape Town

**Date:**2013

 **Published chapter:** *365 Days of Openness: The Emergence of OER at the University of Cape Town- Chapter 3 in Open Education Resources: Innovation, Research and Practice* (Ed) Rory McGrea et al,Commonwealth of Learning, Vancouver

**Source:** http://open.umich.edu/sites/default/files/2013-ngambi-luo-sustainblecollaboer-pub\_ps\_oer-irp\_web-cc\_by\_sa\_0.pdf

**Authors:** Dick Ng’ambi, University of Cape Town and Airong Luo, University of Michigan

**Date:** 2013

**Published Chapter:** *Towards a Sustainable Inter-Institutional Collaborative Framework for Open Educational Resources (OER)* *Chapter 16 in Open Education Resources: Innovation, Research and Practice* (Ed) Rory McGrea *et al*,Commonwealth of Learning, Vancouver

Abstract: The chapter focusses on a collaborative project between a university in the U.S., two universities in Ghana, two universities in South Africa, and an educational non-government organisation(pseudo-named Edu-NGO) based in South Africa.

A primary focus of the project is to scale up teaching and learning capacity in institutions by creating new learning materials and converting existing materials into Open Educational Resources (OER) (Luo et al. 2010a). However, achieving this outcome is not as straightforward as it sounds. Harley (2011, p. 224) reports that “creating OER has increased the workload of pressurized staff at some African institutions” even though one of the main goals of OER is to reduce the “extra workload.” In the current academic world, as Bossu and Tynan (2011, p. 261) rightly observe, “academics today are more overwhelmed and overworked than ever before,” and it will impose a big challenge on OER adoption if OER is seen as creating another task. This Chapter examines these and other challenges.

**Source**: <http://open.umich.edu/sites/default/files/2013-ngambi-luo-sustainblecollaboer-pub_ps_oer-irp_web-cc_by_sa_0.pdf>

**Authors:** Cheryl Hodgkinson-Williams & Michael Paskevicius

**Date:** 2013

**Title:** *It’s Not Their Job to Share Content’: a case study of the role of senior students in adapting teaching materials as open educational resources at the University of Cape Town*

**Abstract:** The University of Cape Town (UCT) joined the OER movement with the launch of the UCT Open Content directory in February 2010. While much of the research has focused on the potential value of OER to institutions and to the community at large, less attention has been paid to the complex processes that need to be undertaken to adapt existing materials as OER and specifically the opportunity to engage senior students in this practice. In this article the authors explore the processes that three senior physics students employed in assisting their lecturers to adapt existing materials as OER, the challenges they encountered and the contribution these students made. The findings reveal that the senior physics students report having sufficient time, knowledge of the field and skill in using a range of technological tools that made the OER adaptation process of their lecturers’ materials easier. Based on the participating physics lecturers’ acceptance of the students’ adaptations of their materials, it would seem that the strategy of using senior students to support busy lecturers to adapt existing teaching materials as OER is worth considering.

**Source -** View full text**:** <http://dx.doi.org/10.2304/elea.2013.10.2.135>

**Presenters:** Cheryl Hodgkinson-Williams and Laura Czerniewicz

**Date:** March 2014

**Title:** OER & MOOCs: What’s the fuss? A review of Open Educational Resources & Massive Online Courses

**Abstract:** The third annual Open Education Week took place from March 10-15, at UCT with both online and locally hosted events around the world (http://www.openeducationweek.org/). As part of Open Education Week Associate Professor Cheryl Hodgkinson-Williams and Associate Professor Laura Czerniewicz provided some insights into what Open Educational Resources (OER) & Massive Open Online Courses (MOOCs) are and why they are being touted as ways of providing access to quality education in tough economic times. By referring to global and local UCT examples of OER on UCT Open Content, this presentation aims to demystify these relatively new opportunities on the educational landscape.

**Access the Webinar video:** http://www.openeducationweek.org/oer-moocs-whats-the-fuss-a-review-of-open-educational-resources-massive-open-online-courses/

**Author:** Glenda Cox (CET, UCT)

**Date:** 2012

**Title:** *Why Would You Do It …Would a Student Actually be Interested? Understanding the Barriers and Enablers to Academic Contribution to an OER Directory.*

**Source:** Cambridge 2012: Innovation and Impact – Openly Collaborating to Enhance Education, a joint meeting of OER12 and OpenCourseWare Consortium Global 2012, Cambridge, UK. <http://www.open.ac.uk/score/files/score/file/Conference%20Proceedings%20Cambridge%202012.pdf>

## Author: Glenda Cox

## Date: 2013:

## Title: *Researching Resistance to Open Education Resource Contribution: An Activity Theory Approach*

##  Abstract: Higher education and associated institutions are beginning to share teaching materials known as Open Educational Resources (OER) or open courseware across the globe. Their success depends largely on the willingness of academics at these institutions to add their teaching resources. In a survey of the literature on OER there are several articles that discuss reasons why academics should contribute teaching materials. There are fewer articles that refer to academics’ concerns or why they choose not to contribute their teaching resources. There have been only a few reported empirical studies thus far, and most of the studies have not been framed within any particular theoretical perspective. Hence there is a need to explore possible theories that might help to conceptualise and explain what enables or constrains the open education movement. This study aims to ascertain whether Engeström’s activity theory and its principle of contradictions is a sufficiently versatile and insightful lens to investigate non-participation of OER contribution. Activity theory was found to be useful for framing the literature and three interviews with University of Cape Town (UCT) academics and for surfacing some of the constraints in the system. The key concerns that emerged centred around the rules in the institution concerning promotion and what is valued by the institution. At present this institution places value on research and until value is placed on sharing teaching materials as OER, it is unlikely that there will be large-scale voluntary contribution to the UCT OpenContent directory.

## Source- view full text: http://dx.doi.org/10.2304/elea.2013.10.2.148

## Author: Tessa Cartmill (CET, UCT)

## Date: 2013.

##  Title: *Viewing the Use of Open Educational Resources Through a Community of Practice Lens: A Case Study of Teachers’ Use of the Everything Maths and Everything Science Open Textbooks.* Submitted in partial fulfilment of the degree Master in Philosophy (Information and Communication Technologies in Education.) Cape Town: UCT.

**Source:** <http://uctscholar.uct.ac.za/PDF/98798_Cartmill_ET.pdf>

## 4.3 Research conducted by the University of the Western Cape (UWC)

The University of the Western Cape is known for its long history of supporting the use, development and diffusion of free/open source software and educational resources.[[18]](#footnote-18) As early as 2005 the University Senate passed an ambitious [Free *Co*ntent, Free/Open *Co*urseware Policy](http://ics.uwc.ac.za/usrfiles/users/8990060109/Strategies/freecourse-0.4.pdf), which removed institutional obstacles to publication of open educational resources. The institution runs a project called the Free Courseware which is part of a broader move towards implementation of OER strategy. Under the free Courseware project, the School of Public Health has published two case studies, one on Malnutrition and the other on Diarrhea. These case studies are available on: <http://www.uwc.ac.za/Faculties/CHS/soph/Pages/OER%20Case%20studies.aspx>

##  Research conducted by University of South Africa (Unisa)

## Authors: Kerry De Hart and Truide Oosthuizen[[19]](#footnote-19)

## Date: 2012

**Title:** *An overview of the strategic OER positioning of the only dedicated ODL University in Southern Africa.*

##  Abstract: From their study Oosthuizen and De Hart concluded that, despite challenges, the institution has a strong commitment towards the OER initiative. They also report that the institution is one of 14 founding anchor partners of the Open Education Resources University (OERu). The researches report that Unisa’s open portal (where at the time, about 5 000 resources were made freely available were available) was at the time receiving about 200 000 hits per month. They also emphasised the need for revisiting institutional policies in order to align them with the new OER strategy. One such policy they isolate is the one for prescribing textbooks which should state that OER must first be evaluated before a “copyright” or proprietary textbook is prescribed.

##  Source: <http://www.unisa.ac.za/cems/news/index.php/2012/11/cems-study-shows-unisas-commitment-to-oers-2/>

##  Research conducted by the Meraka Institute

The main focus of the Meraka Institute is on information and communication technology (ICT). The Institute is actively involved in the business of research, innovation and advanced human capital development.[[20]](#footnote-20) Kim Tucker, a researcher at the Meraka Institute has prepared several papers on OER in South Africa. Including:

**Author:** Kim Tucker and Peter Bateman for the African Virtual University (AVU)

**Date:** 2005

**Report on OER research agenda for the AVU**

**Abstract:** This report summarises a UNESCO-IIEP OER Community discussion conducted in March and April 2006 to brainstorm a research agenda for Open Educational Resources. Over 500 participants from around the world provided a rich diversity of perspectives in the discussions. Topics discussed included existing OER initiatives, current levels of use, collaborative authoring, technology, learning from other open initiatives, quality assurance, dissemination and access.

The report notes that forum discussions that took place in 2005 clearly showed that Open Educational Resources are recognized as having an important role to play in increasing access to knowledge worldwide. It also notes that the forum discussions showed that more study and information is needed to understand how to best produce, share, adapt and use such resources. An important point raised by Bateman and Tucker is that it is important for those participating in the OER movement to be clear that the delivery of resources should not be mistaken for provision of quality education.[[21]](#footnote-21) It therefore became clear to the forum discussants that engaging in the kind of research that locates the OER movement within the broader challenge of creating effective education systems was important as this would ideally lead educators to consider their own pedagogical practice and how it might be improved. [[22]](#footnote-22) The need for developing a research agenda for OER emanated from this realisation: to support resource development and use in the most effective manner possible.[[23]](#footnote-23) The report provides an overview of the discussions aimed at developing such an agenda and is available on the following website.

**Source:** <http://hdl.handle.net/10204/1171>

**Author:** Kim Tucker

**Date:** 2007

**Title:** *Libre learning: OER and equality: OER and equality* [[24]](#footnote-24)

**Abstract:** Tucker discusses OER within the context of the MobilED (mobile education) initiative which is aimed at designing learning and teaching environments that are meaningfully enhanced with mobile technologies and services.

**Source:** <http://www.csir.co.za/meraka/>

* 1. **Research undertaken by the South African Institute for Distance Education (*Saide*)**

African Teacher Education Network (2014). *OER in Teacher Education: Reflections from the OER Africa Teacher Education Network.* Nairobi: OER Africa, A *Saide* Initiative. <http://www.oerafrica.org/resource/oer-teacher-education-reflections-oer-africa-teacher-education-network>

Bateman, Peter (2010). *Revisiting the Challenges for Higher Education in Sub-Saharan Africa: The Role of the Open Educational Resources Movement.* Nairobi: OER Africa, A *Saide* Initiative. <http://www.oerafrica.org/resource/revisiting-challenges-higher-education-sub-saharan-africa-role-open-educational-resource>

Bialobrzeska, Maryla; Hellmann, Liora and Andrew Moore (2011). *William and Flora Hewlett Foundation/ Commonwealth of Learning Open Education Resources for Open Schools Final Evaluation.* Vancouver: COL.

 **Abstract:**  Evaluation of a six commonwealth country project (Namibia, Botswana, Lesotho, Zambia, Seychelles and Tobago) to develop OER for senior secondary open schooling.

 <http://www.col.org/PublicationDocuments/ProgEvalReport_OER-OpenShools_2011.pdf>

Butcher, Neil (2010). *Open Educational Resources and Higher Education.* Johannesburg: Saide/OER Africa. <http://www.col.org/SiteCollectionDocuments/OER_Open_Educational_Resources_and_Higher_Education.pdf>

Commonwealth of Learning (2011). *Guidelines for Open Educational Resources (OER) in Higher Education.* Vancouver/Paris: COL/UNESCO. (*Saide* contributed to the development of this resource). <http://www.col.org/resources/publications/Pages/detail.aspx?PID=364>

Glennie, Jenny; Harley, Ken; Butcher, Neil and Trudi van Wyk (eds). *Open Educational Resources and Change in Higher Education: Reflections from Practice.* Vancouver: Commonwealth of Learning. <http://www.col.org/PublicationDocuments/pub_PS_OER_web.pdf>

Harley, Ken (2011). *2010-2011 African Health OER Network. Phase 2 Evaluation: Consolidation and Sustainability.* Nairobi: OER Africa, A *Saide* Initiative. <http://www.oerafrica.org/resource/2010-2011-african-health-oer-network-phase-2-evaluation-consolidation-and-sustainability>

Harley, Ken (2012). *African Health OER Network: Impact Study.* Nairobi, OER Africa, A *Saide* Initiative/ University of Michigan. <http://www.oerafrica.org/resource/2012-african-health-oer-network-impact-study>

Harley, Ken (2012). *Agshare Planning and Pilot Project Impact Study.* Nairobi: OER Africa, A *Saide* Initiative/ Michigan State University. <http://www.oerafrica.org/resource/agshare-planning-and-pilot-project-impact-study>

Harley, Ken (2009). *Health OER Inter-Institutional Project: Formative Evaluation of Health OER Design Phase.* Nairobi: OER Africa, A *Saide* Initiative/ University of Michigan. <http://www.saide.org.za/resource/health-oer-inter-institutional-project-formative-evaluation-health-oer-design-phase>

Harley, Ken (2011). *Insights from the Health OER Inter-Institutional Project.* Distance Education vol. 32, no.2, August 2011.

Komba, Willy and Tony Mays (2014). *Mkwawa University College of Education (MUCE) and University of Dar-es-Salaam (UDSM), Tanzanaia: Integrating OER into Teacher Development Programmes: A Case Study.* Nairobi: OER Africa, A *Saide* Initiative. <http://www.oerafrica.org/resource/mkwawa-university-college-education-muce-and-university-dar-es-salaam-udsm-tanzania>

Mawoyo, Monica (2012). *Growing an Institutional Health OER Initiative: A Case Study of the University of Cape Town.*  OER Africa, A *Saide Initiative.* <http://www.oerafrica.org/resource/growing-institutional-health-oer-initiative-case-study-university-cape-town>

Moore, Andrew, Donna Preston and Neil Butcher (2010). *The Use of Open Education Resources at the University of Malawi.* Nairobi: OER Africa, A *Saide* Initiative. <http://www.oerafrica.org/resource/growing-institutional-health-oer-initiative-case-study-university-cape-town>

Ngugi, Catherine (2011). *OER in Africa’s Higher Education Institutions.* Distance Education vol. 32, no2, August 2011.

Omollo, Kathleen Ludewig (2011). *Growing an Institutional Health OER Initiative: A Case Study of the Kwame Nkrumah University of Science and Technology. (Saide)* <http://www.oerafrica.org/resource/growing-institutional-health-oer-initiative-case-study-kwame-nkrumah-university-science-and>

Sapire, Ingrid and Yvonne Reed (2011). *Collaborative Design and Use of Open Educational Resources: A Case Study of a Mathematics Teacher Education Project in South Africa.* Distance Education vol. 32, no.2 August 2011.

South African Institute for Distance Education (2009). *Developing and Using Quality Learning Resources in an Open Educational Environment: The Saide ACEMaths Project.* Johannesburg: *Saide.* <http://www.saide.org.za/resource/saide-acemaths-project-final-report>

South African Institute for Distance Education – OER Africa (2012).  *An OER Protocol: Guidelines for Publishing Teacher Education OER.* Johannesburg: *Saide.* <http://www.saide.org.za/resources/newsletters/Vol_18_no.5_2012/Content/OER%20Protocol.htm>

South African Institute for Distance Education – OER Africa (2011). *OER Copyright and Licensing Toolkit: A Guide for Higher Education Institutions Interested in Creating and Using Open Educational Resources.*  Johannesburg: *Saide*. <http://www.oerafrica.org/copyright-and-licensing-toolkit>

South African Institute for Distance Education – OER Africa (2011). *OER Policy Review and Development Toolkit: A Guide for Higher Education Institutions.* Johannesburg: *Saide.* <http://www.oerafrica.org/copyright-and-licensing-toolkit>

University of South Africa (2014). *Unisa Open Education Resources Strategy.* Pretoria: Unisa. <http://www.oerafrica.org/resource/unisa-oer-strategy>

Welch, Tessa (2008). *On OERs: Five Ideas to Guide Engagement with the Open Educational Resources ‘Movement’.* Johannesburg: *Saide.* <http://www.oerafrica.org/resource/oers-five-ideas-guide-engagement-open-educational-resources-movement>

##  Research undertaken by Neil Butcher and Associates (NBA)

**Author:** Butcher, Neil

**Date:** 2011

**Title:**  *A Basic Guide to Open Educational Resources.* Vancouver: Commonwealth of Learning.

**Source:** <http://www.col.org/PublicationDocuments/Basic-Guide-To-OER.pdf>

**Author:** Sarah Hoosen[[25]](#footnote-25)

**Date:** 2012

**Title:** *Survey on Governments’ Open Educational Resources (OER) Policies: Report prepared for the World OER Congress*; COL/UNESCO, Vancouver/ Paris

**Abstract:** The analysis paper was based on questionnaires that were sent out to Commonwealth Governments, as well as OECD Commonwealth countries by COL in October 2011. The governments of the provinces, states and territories of Australia and Canada also responded to the survey. In addition to the questionnaires sent out by COL, UNESCO sent the same questionnaire to all 195 UNESCO Member States through the usual official channels (i.e., the Permanent Delegations to UNESCO located in Paris and the National Commissions for UNESCO located in different ministries at a national level). South Africa was one of the nineteen African countries included in the survey. UNESCO questionnaires were sent out in January 2012. In addition to the questionnaire data, some respondents provided input via letters rather than specific responses to the questions posed. These responses were also analysed in Hoosen’s paper.

The study concluded that there appears to be great interest in OER across all regions of the world, with several countries embarking on notable OER initiatives. The report acknowledges that several South African institutions are involved in OER initiatives, and cites the examples of the University of the Western Cape which is a member of the OpenCourseWare (OCW) Consortium and runs its own OpenCourseWare projects, the South African Institute for Distance Education (Saide) which runs the OER Africa initiative and the Department of Basic Education which manages the education resource portal (Thutong) with free and open resources for schools.

According to the report, the survey itself raised interest and awareness of OER in countries that may not have had much prior exposure to the concept.[[26]](#footnote-26) The report also shows that different regions face different obstacles to OER adoption. Few explicit OER policies exist in surveyed countries and there appears to be some confusion regarding an understanding of the concept and potential of OER.

Key recommendations on the way forward:

* Undertake studies on the OER landscape in various regions, particularly noting its effectiveness, cost-effectiveness and impact to motivate and encourage countries to adopt policies and practices. It may also be useful to set up a repository of OER research to enable policy makers to view the findings.
* Given the confusion apparent in some responses, there is clearly an ongoing need for further advocacy and information-sharing to motivate countries and institutions to harness OER. It may also be worth targeting regional higher education bodies or ODL regional organisations that have also embarked on OER strategies. The paper suggests that amongst other activities, efforts shouldy focus on:
* widely circulating the *Basic Guide to OER* prepared by COL and UNESCO to countries, institutions and regional education bodies; and
* raising awareness and clear understanding of the concept of OER, plainly and simply in multiple languages. This would need to include clarifying that OER is about learning materials and not specifically about open software and open access journals (although these are related), as well as clearly defining the differences between OER, ODL and e-learning.

**Source:** <http://www.col.org/PublicationDocuments/Survey_On_Government_OER_Policies.pdf>

**Authors:** Neil Butcher & Sarah Hoosen [[27]](#footnote-27)

**Date:** 2012

**Tittle*:*** *Exploring the Business Case for Open Educational Resources, COL, Vancouver*

**Abstract:** Commissioned by the Commonwealth of Learning, this research report was prepared as input to the World OER Congress organized by UNESCO in June 2012. In their paper, the authors situate the contribution of OER in the wider context of the challenges facing education at all levels in an era of economic stringency. They relate OER to the realities of the teaching-learning process, arguing that greater reliance on resource-based learning, rather than large-group teaching, will be essential if wider access to education of quality is to be achieved. Butcher and Hoosen present compelling evidence that using OER can substantially reduce the cost of creating high quality teaching and learning resources. They also present some startling analyses of the economics of textbook production, which again show that systematic processes of investing in OER can create huge savings for governments and students. They further argue that the commercial publishing industry can play a part in this process.

**Source:** http://www.col.org/resources/publications/Pages/detail.aspx?PID=421.

1. The State of South Africa’s Infrastructure 2012 Report prepared by the Department of Performance Monitoring and Evaluation (DPME) & the Development Bank of South Africa (DBSA) [↑](#footnote-ref-1)
2. Siyavula is a Nguni word which means "we are opening". [↑](#footnote-ref-2)
3. The Post Schooling system refers to all public institutions in the following subsectors: The Technical and Vocational Education and Training Colleges (TVET colleges), the newly proposed Community Colleges and Universities. [↑](#footnote-ref-3)
4. The OpenCourseWare Consortium is a worldwide community of hundreds of higher education institutions and associated organizations committed to advancing open education and its impact on global education. It seeks to engender a culture of openness in education to allow everyone, everywhere to access the education they desire, while providing a shared body of knowledge and best practices that can be drawn upon for innovative and effective approaches. [↑](#footnote-ref-4)
5. Eve Gray; Cheryl Hodgkinson-Williams & Michelle Willmers (2009) The OpeningScholarship project Executive Summary. <http://www.cet.uct.ac.za/files/file/OS%20Executive%20Summary%20_%20Final%20typeset.pdf> Accessed on 01 04 2014 [↑](#footnote-ref-5)
6. http://ocw.mit.edu/OcwWeb/web/home/home/index.htm [↑](#footnote-ref-6)
7. http://openlearn.open.ac.uk/ [↑](#footnote-ref-7)
8. http://ocw.jhsph.edu/ [↑](#footnote-ref-8)
9. http://webcast.oii.ox.ac.uk/?view=Default [↑](#footnote-ref-9)
10. http://athome.harvard.edu/archive/archive.asp [↑](#footnote-ref-10)
11. https://open.umich.edu/ [↑](#footnote-ref-11)
12. Airong Luo, Dick Ng'ambi, Ted Hanss (2010) Fostering Cross-institutional Collaboration for Open Educational Resources Production. Regents of the University of Michigan and University of Cape Town. [↑](#footnote-ref-12)
13. Airong Luo, Dick Ng'ambi, Ted Hanss (2010) Fostering Cross-institutional Collaboration for Open Educational Resources Production. Regents of the University of Michigan and University of Cape Town. <https://open.umich.edu/wiki/Health_OER_Collaborations>. [↑](#footnote-ref-13)
14. Ibid, p.2 [↑](#footnote-ref-14)
15. Ibid [↑](#footnote-ref-15)
16. Luo, A., Nga’mbi, D. & Hanss, T. (2010:5) [↑](#footnote-ref-16)
17. University of Cape Town (2012) Growing an Institutional Health OER Initiative: A case study of the University of Cape Town, Saide, Johannesburg.

A Case Study of the University of Cape Town [↑](#footnote-ref-17)
18. Free Courseware at UWC. <http://freecourseware.uwc.ac.za/> Accessed 04 04 2014 [↑](#footnote-ref-18)
19. Crous, I. (2012) CEMS study shows Unisa’s commitment to OERs : <http://www.unisa.ac.za/cems/news/index.php/2012/11/cems-study-shows-unisas-commitment-to-oers-2/> Accessed 21/05/2014 [↑](#footnote-ref-19)
20. CSIR research and development in information and communications technology (ICT); <http://www.csir.co.za/meraka/> Accessed on 04 04 2014 [↑](#footnote-ref-20)
21. Bateman, P. and Tucker, K.C. (2009:85) [↑](#footnote-ref-21)
22. [↑](#footnote-ref-22)
23. Ibid [↑](#footnote-ref-23)
24. Tucker, K. 2007. Libre learning: OER and equality. Open Education 2007. "Localizing and Learning". Logan, Utah, USA, 26-28 September 2007, pp 89 [↑](#footnote-ref-24)
25. Sarah Hoosen (2012) Survey on Governments’ Open Educational Resources (OER) Policies: Report prepared for the World OER Congress; COL/UNESCO, Vancouver/ Paris [↑](#footnote-ref-25)
26. Sarah Hoosen, (2012;25) [↑](#footnote-ref-26)
27. Neil Butcher & Sarah Hoosen (2012) Exploring the Business Case for Open Educational Resources, COL, Vancouver [↑](#footnote-ref-27)