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1. Brief summary of POERUP

POERUP is carrying out research to understand how governments can stimulate the uptake of OER by policy means. It has been aimed to convince decision-makers that in order to be successful with OER, they will have to formulate *evidence-based policies* based on looking *beyond* one's own country, region or continent, beyond the educational sector they look after.

The project used a multi-method research approach to triangulate research data from different sources to gain an in-depth view of the European OER policy environment by:

- Producing a global inventory of relevant national and other large-scale OER initiatives as a result of a thorough desktop analysis.
- Producing country reports and mini-reports created based on literature review and document analysis of relevant policy papers and country reports from previous projects and are available on the [POERUP wiki](#).
- Selecting case studies from the inventory in the context of the country studies. To gain an in-depth view into the dynamics of OER communities, Social Network Analysis (SNA) methodology was used. Based on the analysis, recommendations were formulated.
- Creation of policy advice reports for universities, schools and colleges and for a number of EU countries.

This is the report prepared for Poland.

2. OER in Poland

2.1 Recent growth

The OER movement in Poland has been considerably growing in the last years. The increase can be observed both in the variety, amount of projects and their promotion as well as in the context of open policies.

Poland has had a strong social movement towards the openness of resources and through effective spending of the EU grants has built openness into many government policies, following a number of years of grass roots initiatives. The UNESCO Paris OER declaration of 2012 has provided an additional impetus.

Over the last two-three years, Poland moved from being a country where openness of resources was just a topic of public discussion, awareness raising by activists, and limited use by the educational sector - to a country which is the first to introduce a national programme for the development, with public funding, of textbooks that are open educational resources.

Evaluation of the implementation of this and mapping the results and their impact can help to spread the idea and create better policies based on the lessons learned.

2.2 Notable ICT and OER initiatives

2.2.1 School level

For the educational system, the challenge has been to be more responsive to the requirements of the labour market. Developments started in 2000-2005 with the supply of schools with computers. Digitalisation of schools has been however a fragmented process, due lack of coherent approach to modernisation and the financing system being dispersed between central and regional levels.

With the National e-textbook programme “Digital School” since 2011 there has been a significant progress in ICT use and the implementation of OERs. The programme is planned not only as hardware and broadband provision but also as resource creating initiative, aiming at developing both student and teacher competences in applying ICT including the creation of educational videos and multimedia.. All deliverables will be available on an open public educational portal www.Scholaris.pl and published as Open Educational Resources.

The programme is scheduled for 2012 - 2015 and plans to release 63 e-textbooks for 18

primary-school subjects. If successfully implemented, the Ministry would continue the programme for all schools in Poland. The ultimate target is establishing e-schools and e-classrooms. The e-textbook platform works with flexibility (on- and offline) and multi-platform approach, its modularity allowing the generation of various versions, security and scalability.

The “Digital School” programme has two recommendations for openness: (i) assuring legal and technical conditions to guarantee that the content created would be both open and technically available and (ii) possibilities for the coexistence of OER together with the publishers on the commercial market.

Another government initiative to decrease costs of education in Poland is the free ABC-book, a programme launched for first graders in 2014.

In the primary and secondary school level a notable initiative is *School with Class 2.0* programme, launched in 2010 by the Centre for Citizenship Education and *Gazeta Wyborcza*. It focuses on developing digital competences among students and teachers, the creation of materials and sharing them with others. Materials are published in the repository *Baza 2.0* (Base 2.0) and available under Creative Commons licenses.

2.2.2 University level

The Nicolas Copernicus University has been working towards opening up access to scientific resources. Following the KPBC Digital Library initiative, which now contains thousands of digital open resources, the University launched an open repository on which videos of courses and lectures, webinars and materials from conferences and educational meetings are available.

In 2010 the Akademia Górniczo-Hutnicza launched Open AGH - the first Polish repository of open learning resources for STEM at academic level. Now it consists of around 100 resources with 1500-2000 learning hours. Open AGH contains online courses as well as single documents – syllabuses, e-books, notes from lectures and video recording lectures, animations, etc. aimed particularly at technically-oriented learners.

Subsequently other universities started to share their didactic materials under the same regulations. The Warsaw University started two independent projects: one aimed at development teaching materials for mathematics and the other one for physics in medicine and biology, under free license.

Notwithstanding the acceptance of openness by scientists, OERs at academic level in Poland have not developed to the extent as on school level. Only a few universities in Poland

develop Open Educational Resources. In the academic community the Open Access movement is more advanced than OER.

2.2.3 OER movements by NGOs

In Poland the non-governmental sector has been active in introducing Open Educational Resources. The Modern Poland Foundation in 2004 established a repository: Free Readings Internet Library which contains many school readings recommended by the Ministry of National Education, available for free. The Wikimedia Polska Association is another very active non-governmental organisation. Since 2005 it has promoted and supported projects by the Wikimedia Foundation developed on Polish soil like Wikipedia Free Encyclopedia, Wikimedia Commons, WikiBooks or lately, a competition: Wiki Lubi Zabytki (Wiki likes monuments).

Since 2009, with actors of the non-governmental sector, a conceptual framework for the development of OER in Poland has been built up including a recommendation for the non-governmental sector, prepared by the Polish Federation of Non-governmental Organisations - OFOP. The recommendations suggest the possibility of increasing the efficiency of the funding by the requirement to grant a free license for the results produced or by awarding openness in grant-funded programmes, suggesting a moral duty to share publicly funded products under free licenses. The Coalition for Open Education prepared templates of agreements for granting licenses including guarantees to make the resources available under free licenses.

A prominent grant programme in the context of openness is the *Orange Academy* launched in 2009 by the Orange Foundation. It offers grants for projects connected to modern cultural education. All beneficiaries are obliged to publish the results under the Creative Commons Attribution license. Another grant programme *Digital Heritage* realised by National Audiovisual Institute (NInA) offers funds for digitalising resources collected by archives, libraries, museums, made publicly available online without any restrictions.

Since 2011 Polish GLAM (Galleries, Libraries, Archives and Media) institutions have started to be more open. Due to digitalisation process and online repositories they can reach wider audience. In 2013 the first international conference on Open GLAM was organised in Poland for discussion of the adoption of open approach.

Poland has strong non-governmental groups working around copyright like Creative Commons Poland (2005) and Coalition for Open Education Poland (2008). After 2012, the Stop ACTA movement started copyright reform proposals to reach politicians on national and EU level, leading to new forms such as the Copyright Forum.

Polish young scientists created for the promotion of the Open Access policy a social movement – “Citizens of Science”. The aim was to develop a Pact for Science, as a social contract for the development of a respective state policy in science and higher education.

2.2.4 Opposition to growth in OER

Whilst In Poland examples of open policies exist in many different fields, the opposition to the introduction of related systemic changes for openness is growing. It is worth noting the massive criticism from the publishing sector. The leading Polish textbooks private publisher WSiP accused the Ministry of Education of copyright infringement.

3. POERUP policy advice for Poland

OER policy advice for Poland is drawn from the overall EU-level policy recommendations and is presented for each sector.

3.1 Primary and secondary education

3.1.1 Communication and stakeholder involvement

- The reforms and national programmes for OER should be prepared in cooperation with all actors involved at different levels. Mass media communication, awareness raising, for engagement of parents and teachers, and teacher training are desirable.
- Community involvement may help to avoid slowing down the implementation of education policies (due to change of government, halt of reforms). Supporting research on OER methods, adoption, sustainability and business models to develop evidence based policies is recommended.

3.1.2 Quality assurance

From the teachers' side it is important to develop their understanding of new modes of learning (including online, distance, OER and MOOCs) and how they impact quality assurance and recognition. There is need for more discussion and debate about how educational models (like flipped classroom, blended learning, using online resources) can be connected with quality assurance and recognition.

3.1.3 Funding mechanisms and copyright/licensing models

The intersection of business models with copyright and licensing issues is the most controversial part of implementation of OER. The publishing industry, which in Poland is worth more than \$ 1 billion, feels threatened by the introduction of new technology solutions combined with open resources.

Any open policy should be planned with an understanding of the broader context of how it can change, improve or disrupt areas they are affecting, including understanding how fast technology is changing and how projects' implementation is spread over time.

Funding mechanisms, EU and national level, should promote availability of both resources and software under appropriate open licenses. Any tenders and funding mechanisms should take care of accessibility of created resources.

3.2 Policy advice for the HE sector

3.2.1 Potential impact of EU initiatives

The approach of Polish higher educational institutions to OER is diverse and rather conservative. Hopefully due to the EC initiative *Opening up Education* the emerging trends will influence positively the academic community. The Polish academic community is interested in EU movement toward openness. There is a strong correspondence of Polish open access policy with recommendations of the European Commission written in the Horizon 2020 programme.

Many educational programmes, have been funded through the European Social Fund within its Operational Programme Human Capital. In a report published in 2013 use of free licenses (CC BY or CC BY-SA) was suggested for the dissemination and exploitation of the ESF results.

Since 2010 the Ministry of Science and Higher Education has conducted a more progressive policy towards opening up scientific resources. In 2012 an appeal was issued to the national science funding bodies, advocating the introduction of open access to scientific resources.

3.2.2 Funding mechanism and copyright model

- Textbooks developed with governmental funding should be published as open textbooks accessible for students free of charge. An additional benefit of OER may be that an open license makes it possible to update and improve them.
- Universities should develop internal bylaws for their teaching staff on IPR with terms and conditions to publish and re-use educational materials.

3.2.3 Institutional repositories

- HE institutions should launch and maintain their repositories of open content. Opening up resources can function as a showcase to attract new students. The aspect of centralisation may be important: one repository/data base to be used for research and scientific as well as educational materials. Institutional policy to store and access OER should include the capacity to manage and share resources both internally and externally.

3.2.4 Providing support for academic staff

- This should include support in IPR and ICT, to increase awareness about copyright and privacy policy through trainings. In order to develop modern OER and adapt existing one staff should update their ICT skills regularly.

3.2.5 Quality assurance

- OER within internal quality assurance process has been an important factor.

Universities should work out relevant processes of validating the quality of educational materials before they are published as OER, using the same scrutiny in the review process as other course materials.

- Quality assurance bodies should develop criteria for assessing the effectiveness of the integration of OER into institutional practice.

3.3 Policy advice for NGO sector and government

3.3.1 Government to rely more on NGOs

- It is necessary that governments are open to cooperation, taking into account the specificities of NGO work in policy making process. Non-governmental organisations can be more flexible than large publishers and can perform more specific needs. The specificity of their work, however, must be considered and supported by facilitating appropriate participation in tenders.
- Poland policy work in educational fields has grown up especially on non-governmental side. The Ministry of National Education could use the experience and initiatives to facilitate policy process and implementations of modernisation reforms.

Poland is, among a few countries, the place in which a group of nongovernmental organisations, universities and public institutions have formed coalition around a common aim, which is a promotion of Open Educational Resources, public domain and openness in cultural, heritage and science sectors.

3.3.2 Clear rules written in grant regulations

- The obligation of assuring the openness of the content developed due to public funding should be written in to the grant programme regulations. To strengthen this approach, the governmental institutions providing grants should oblige beneficiary institutions to publish the results of the projects as open resources.

3.3.3 Technology and openness

- Using formats compatible with open standards is requested which increase accessibility and searchability of the resources. To maximise the knowledge and experience of the GLAM sector (libraries, museum and archives) as well as use the national infrastructure, a national metasearch engine can be a solution that can cope with distributed resources.