

# UNESCO OER Dynamic Coalition Consultations

22 – 24 July 2020

Final Meeting Report



United Nations  
Educational, Scientific and  
Cultural Organization



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## Introduction

Following the adoption of the OER Recommendation<sup>1</sup> in November 2019, UNESCO launched the OER Dynamic Coalition in March 2020. The launch meeting defined a Roadmap for the activities of the Dynamic Coalition. The Coalition aims to reinforce international and regional cooperation among all stakeholders in the first four areas of the UNESCO OER Recommendation and support governments in implementing the OER Recommendation. Building on the activities to date, the online consultation for the OER Dynamic Coalition Working Groups was held on 22, 23 and 24 July 2020 on Zoom. This meeting was organized by the Communication and Information Sector, UNESCO in the framework of the OER Dynamic Coalition. This online consultation brought together some 70 stakeholders from governments, institutions, Inter-governmental Organizations, Non-government Organizations and the private sector from all UNESCO world regions (Annex 4: Overview of Participants).

This consultation followed up on an online survey<sup>2</sup> by UNESCO held between 10 and 20 July 2020. The survey collected information on priority areas of action which served as the basis for the discussions held during the consultation.

The objectives of the online consultation were to:

- Further clarify the priority areas of action per Working Group; and
- Identify activities and issues related to the establishment of an electronic tool for information sharing and collaboration on the activities of participating organizations.

The online consultation consisted of six sessions. Four of these sessions focussed on the four thematic Working Groups' areas of action. In addition, an opening session was held on 22 July 2020 (AM) and a closing session was held on 24 July 2020 (PM). The four thematic sessions were :

- Working Group 1 – Capacity Building: Building capacity of stakeholders to create, access, re-use, adapt and redistribute OER (24 July AM)
- Working Group 2 – Policy: Developing supportive policy (23 July PM)
- Working Group 3 – Inclusive Equitable Quality OER: Encouraging inclusive and equitable quality OER (23 July AM)
- Working Group 4 – Sustainability: Nurturing the creation of sustainability models for OER (22 July PM)

Furthermore the following transversal themes were addressed throughout the deliberations of the Working Groups: Communications strategy; Monitoring: strategies, research, measurement, reporting; Liaison with National Commissions; and Support for work with Emerging Technologies and Artificial Intelligence (AI).

Recordings of the sessions and presentations were also made available on the [OER Africa website](#) in order to allow participants who could not participate in certain sessions due to time zone or other issues the access to the deliberations. Those who participated asynchronously were encouraged to provide any inputs on the session(s) to the Rapporteur via email. The report for this consultation, which has been prepared with secretarial assistance from OER Africa, is presented below.

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<sup>1</sup> The first four areas of the UNESCO OER Recommendation are 1) Building capacity of stakeholders to create, access, re-use, adapt and redistribute OER; 2) Developing supportive policy; 3) Encouraging inclusive and equitable quality OER; and 4) Nurturing the creation of sustainability models for OER. The Dynamic Coalition responds to the fifth area of action of the UNESCO OER Recommendation 'Promoting and reinforcing international cooperation

<sup>2</sup> English : [https://docs.google.com/forms/d/1pZY9EV510\\_mwiiEGc-gTGzW6piYQzV9-Em1ngFSaeRM/edit](https://docs.google.com/forms/d/1pZY9EV510_mwiiEGc-gTGzW6piYQzV9-Em1ngFSaeRM/edit);

French:

[https://docs.google.com/forms/d/1KVShLvVdojjwYgRgrhg0yaAlJiXwjb\\_8D9PY71ikF5o/edit?usp=forms\\_home&ths=true](https://docs.google.com/forms/d/1KVShLvVdojjwYgRgrhg0yaAlJiXwjb_8D9PY71ikF5o/edit?usp=forms_home&ths=true)

## Deliberations of the Online Consultation

### Session 1: Opening

The session was facilitated by Ms Zeynep Varoglu, Programme Specialist, Communication and Information Sector, and Coordinator of the OER Dynamic Coalition, UNESCO. After providing a technical explanation to participants about the Zoom platform that was being used for the consultations, Ms Varoglu outlined the objectives of the consultation and provided a background on the OER Dynamic Coalition. Following this, Ms Varoglu provided an overview of the survey results (Annex 1) and next steps following the consultation.

Mr Gasper Hrastelj (Slovenia), OER Dynamic Coalition Chair for Liaison with National Commissions, then underscored the importance of UNESCO Member States' involvement in the OER Dynamic Coalition's activities. Dr Mitja Jermol (Slovenia), OER Dynamic Coalition Chair for AI and Emerging Technologies, then presented on the roles for AI in supporting the OER Recommendation. Ms Alexis Carr (Commonwealth of Learning), OER Dynamic Coalition Chair for Monitoring continued with a presentation on key aspects related to monitoring of activities. Mr Neil Butcher (South Africa), Chair for Communications and Rapporteur for the consultation further outlined the communications strategy and its relevance to each of the working groups' activities. Mr Butcher highlighted the importance of using the communications strategy to reach out to key decision makers and OER users.

In summary, the opening session set the scene for the upcoming sessions and outlined key areas of inquiry for the consultations.

### Session 2: Working Group 4 – Sustainability

Ms Varoglu introduced the session and provided a background on the OER Dynamic Coalition. The discussion was facilitated by Dr Lisa Petrides (United States) and Prof Tel Amiel (Brazil), both OER Dynamic Coalition Chairs for Sustainability. Participant inputs are provided below according to the themes that the discussion covered.

#### (a) Reviewing and updating current provisions and procurement policies

Participants highlighted the need for OER awareness-raising and collaboration with OER users, where it is important to encourage learners and teachers to learn more about OER, how to use and how to adapt them.

They agreed that collecting examples of good practice and sharing them would be a useful activity. Within this, participants emphasized the importance of writing up examples about their own experiences in the field so that others could extract key learnings. SPARC is currently running a survey looking at open scholarship services and infrastructure and how they are funded, what their costs are, as well as models they are using. A participant noted that the group could repurpose that survey for open education.

One example was provided of the shift between procurement models in South Africa. Previously, there had been an open market model where publishers would publish books and universities would receive funding to buy a certain number of textbooks. The participant's government department changed the procurement policies to have a parallel process where instead of getting money to buy textbooks, they now contract writers and publishers to write open textbooks and then make them available as OER. When asked how the department shifted from procurement to authoring, the participant

explained that there was an internal drive from a policy perspective. They made use of donor funds to prove the concept and put a tender out on that money. Instead of a large policy drive at the beginning, they took a more organic approach. Others stressed, however, that it is important to maintain the lens of policy within the context of the Dynamic Coalition, focusing on how stakeholders share frameworks across and assist others in creating policies that support the OER Recommendation's objectives.

Demonstrating how it incorporates Open Education practices into their model, the same government department in South Africa applies a standard clause to their tenders, stating that all copyright and intellectual property rights of the materials developed by the service provider over the course of the project lie with the Department, which has the right to allow any individual, company, agency or organization to use or modify the materials for any purpose approved by this Department. This includes selling the materials or releasing them under an appropriate open licence.

Participants indicated that open procurement policies are important as they empower schools, universities, and colleges to stipulate open licence requirements in their requests for proposals and contracts, which may require their service providers to deliver openly licensed resources. Participants suggested that governments should be involved in formulating and implementing both - national open licensing policies and open procurement policies.

Focusing on implementation frameworks, a second example referred to the design of an online course for STEM education in the Netherlands. In this example it was highlighted that during the COVID-19 pandemic, the number of participants grew dramatically to 600. The designers changed the content of the online course to focus on the main needs of the participants. They collected resources, tools, and overviews of course participants needed to take action in their communities. The designers also started a training programme for teachers, which was highly appreciated by teachers.

#### (b) Catalysing new sources for funding and resource sharing

Participants explored possibilities around creating new funding models and mechanisms, as well as how to encourage resource sharing in multiple ways. It was suggested that the group explore whether there are certain principles or values that they want to develop that might influence the approach to sustainability.

With regard to new funding sources, the group emphasized that it would be important to gain an understanding of different business models by looking at larger commercial publishers and how they use open concepts to build new business models. They suggested that it might be effective to map out the publishing landscape to identify and gain an understanding of newer business models and the contexts within which they operate. The need for a multi-stakeholder approach came through strongly, with the suggestion that classrooms do not operate in silos but are part of a much broader network, with each stakeholder playing a role in sustaining the network.

One example of a viable financial model was a systemic approach where an organization examined where they were spending existing textbook budgets by listing their textbooks and their cost across the colleges where they were being used. The organization selected the most expensive textbook and found out that it was spending \$71 million of public money on the textbook. They also calculated what percentage of student financial aid was being spent on the textbook. The organization approached the state legislature with the figures. The statistics were so convincing that the legislature contributed some seed money to make the curriculum open. The organization was encouraged to apply the same methodology and examine other budgets being spent on resources, reallocating them to open resources. Although effective, it was a time-consuming process. With this example in mind, looking at current budgets and analysing how the money is flowing is critical first step.

A counterargument to this is that it is not always easy to revise and reallocate existing budgets to support OER. One approach might be to start with a proof-of-concept and then show that it has financial gains and is sustainable. Publishers maintain that they have the capacity to update, revise, and maintain quality that government cannot, which is why another participant indicated that her government department pays publishers for developing OER and then again for updating them, which proves to be much more cost effective.

Another example came from a South African university context, where the institution has a Professional Development department for academics. The department is in the process of consolidating all of its resources into OER as they start sharing them online. They are collaborating across universities – both locally and continentally. As the process unfolds, they have noticed that the wave has reached other institutions. They have applied to the university for a grant to employ personnel for these activities. The sustainability of the activities, however, depends on proper coordination and sufficient funding.

### (c) Research

The facilitators probed the group on how research might be used to inform approaches to sustainability. There were calls for creating a research agenda, as well as funding mechanisms to support OER champions. Participants noted that focus on cost is only one aspect of sustainability, but there are other important aspects to explore. For example, how do organizations get funded? What models do they use? How do they structure themselves to use funding efficiently?

Another proposal for research was to identify a number of publishing services and models that have existed for a while and develop a catalogue of examples to analyse. The research might yield archetypes that provide a sense of who is producing certain resources for particular groups, also giving insight into where the funding is derived from.

Research is most useful when multiple stakeholders in a field have discussed what questions would be useful to research. Participants suggested creating a forum for governments and NGOs around the world to discuss sustainability issues and potential research areas that might provide insight into how to overcome persistent challenges.

Participants also called for more research to identify commonalities between different online learning approaches around the world, as well as where there is room for improvement and growth in aligning learners' needs with designers' outputs.

Other suggestions on research topics included:

- Cases and research around reuse to help convince sceptics.
- How can we demonstrate the value of OER in practise on specific communities?
- How can Open Education and Open Science be combined and join forces for a better and sustainable society (not only in COVID-19 times)?

Ultimately, the session highlighted crucial points with regard to implementing sustainability mechanisms for OER activities, which included reviewing existing structures and creating new ones. The conversation provided critical insights into areas for future research and collaboration in this respect.

## Session 3: Working Group 3 – Quality, Inclusive Multilingualism

Ms Varoglu introduced the session and explained the Zoom system to participants. The session was facilitated by Dr Melinda Bandalaria (Philippines) and Mr. Papa-Youga Dieng (Organisation internationale de la francophonie), both OER Dynamic Coalition Chairs of Quality, Inclusive Multilingualism. Participants' inputs are summarized below.

### (a) Accessible and Inclusive OER

Participants pointed out an inherent bias in accessing OER and other digital content, where learners from poor backgrounds sometimes do not have devices to access content, while others do not have access to large amounts of data for internet usage. Within this context, improving OER accessibility involves catering to different levels of infrastructure. Participants noted that diversification of technological formats is key to improving accessibility. They highlighted that, in addition to multimedia, content should also be available in formats that use less data (such as text, printed resources, and audio podcasts). Drawing inspiration from an initiative that promoted accessibility in Germany, one proposed solution to ensure equitable access to OER was to identify individual needs and preferences and then implement a framework within which all content developed should be described in a way where it can be transferred into other media formats.

Participants discussed how AI might be used to create global services, as mentioned above, where designers and users do not have to worry about accessibility of infrastructure challenges because robots are able to automatically translate content into the user's preferred format. Subsequently, the participant who offered this point explained that this should not and cannot be a task for AI, but should fall with accessibility experts and intelligent design of these services, as AI cannot currently be easily monitored and evaluated.

The group also noted that in order to promote inclusion, OER should be accessible for people with disabilities. For example, OER can be 'translated' into braille, and digital OER should be designed for screen readers, following principles of Universal Design for Learning. Other recommendations were to make content available through open source software and platforms, as well as to veer content creators away from licensing their content as 'No Derivative (ND)' and 'Non-commercial (NC)', which makes it difficult for people to use the content.

### (b) Multilingualism

After presenting the survey results regarding multilingualism, the group discussed translation and accessibility in terms of different languages.

Participants were in favour of supporting minority languages in various ways. This included suggestions to systematically translate artifacts (such as toolkits, guidelines and other resources) into minority languages (therefore supporting the goals of equitable access and promoting minority languages in different disciplines) and increasing the number of multilingual and contextually relevant OER through a strategy. The latter point would require one to pay attention to contextual relevance of terminology across languages and dialects. Participants explained that localization of OER therefore extends beyond translation and depends greatly on context, although they noted that contextualization should only be applied when it is important, not over trivial differences. Examples of contextually relevant OER projects are included in Annex 3.

One example came from the Arab States Region highlighted that despite a wealth of content, there are difficulties in sharing content due to language barriers. One proposed solution for this was to have



nodes in Member States – institutions with volunteers who translate content – which could enable the production of high-quality translated materials. This would create a network of OER translation that can be of great use to people until AI improves. Participants elaborated on this point, explaining that current AI translation Programmes such as Transifex are simply not accurate enough yet.

### (c) Quality Assurance

Participants discussed potential priority areas for action in terms of quality assurance mechanisms for OER, noting that this topic is of particular concern now as a result of the shift to online learning due to the COVID-19 pandemic.

The group reiterated that high quality OER are also the basis for inclusiveness, explaining that access for all should be one of the quality criteria for OER.

Frameworks to measure the quality of OER, as well as to support OER creators to design high quality OER and improve existing OER were highlighted. In this regard it was stated that the first quality standards for technology enhanced learning and online media as a national standard in Germany as well as in over 60 countries have been established (see Annex 3). As a result, multiple applications of these standards across the world have been undertaken. This experience reaffirms the point that the Recommendation needs to go beyond such frameworks and bring them into practice so that teachers in school, university lecturers and lifelong learning trainers can adopt the standards and implement measure that support high quality education of any kind, in line with the United Nations Sustainable Development Goal (SDG) 4. OER can therefore be a means to facilitate SDG4 as well as to improve the quality of education globally.

A second example came from Francophone OER initiatives which have set up a validation process that involve collaborating with ministerial departments in charge of accreditation. This is particularly useful because OER often depends on informal content, produced by teachers for their own purposes that they can share with their communities. Thus, any quality assurance system should ensure the quality of informal resources. The main question that arose from this point were what mechanisms might be used to navigate formal government structures so that when teachers produce resources, they are required to submit them for government approval.

A third example spoke to the question above, showing how government departments can facilitate the production of high-quality resources. In the United States, state departments of education bring curriculum specialists together to curate collections of content for a particular grade band. They train teachers on quality, so that the teachers begin to understand content alignment issues. The collections of content that they produce are now the most used content from one state to another. In practice, the example shows that when teachers have been trained and work together, there is an excellent quality set of resources that are produced and curated for others to use.

The final example came from Lebanon, where instructors at the Centre of Educational Resource Development found issues with the quality of OER. In response, a participant has been adapting a brief guide for instructors, to enable them to create and adapt OER. The guide will be translated into Arabic and covers various topics including licencing; accessibility standards; currency and relevance of content; inclusivity and user experience of the resource.

Quality assurance challenges highlighted by participants included the issue of getting teachers to agree on what good quality content is and the need to accept diversity and inclusivity in content, meaning that quality criteria should not be overly restrictive but should still take into account various quality controls.

## (d) Research

The survey results highlighted a need to encourage research with communities of practice in inclusivity, accessibility, multilingualism and related fields.

One example came from research on the impact of the use of OER in South East Asian countries (See Annex 3). The research emphasized the need for OER to be contextualized, as it found that most OER are available in English, so teachers were unable to use the OER in their own teaching. The research also found that students want their teachers to lead with regard to the use of and awareness around OER. Findings also showed that not many countries in the region have national policies on the use of OER. Recommendations included developing policies that require publicly funded educational resources to be openly licensed. Arising from this research, one of the main questions – which suggests a possible research area – is how to provide incentives to teaching staff to publish editable and accessible OER in public repositories. This is particularly relevant within the context of COVID-19. The research might include investigating how to create national platforms for MOOCs and OER as well as other issues related to infrastructure, such as mobile learning materials that can be used in rural and remote settings.

Participants also suggested conducting research on how courses are translated to examine trends and lessons to improve translations in future. These findings could be used to develop information on how to translate effectively and accurately.

This session highlighted several aspects of accessibility and inclusivity, from catering to differently abled people, to ensuring that resources are accessible in multiple languages. Above all, the inputs emphasized the need for diversity and inclusivity in all of the Coalition's focus areas.

## Session 4: Working Group 2 – Policy

After providing an introduction to the session, Ms Varoglu introduced the facilitators, Dr Maria Soledad Ramirez Montoya (Mexico) and Dr Jane-Frances Agbu Obiageli (Nigeria), both OER Dynamic Coalition Chairs for Policy. The facilitators provided an overview of Action Area 2: Developing Supportive Policy for OER as well as a synthesis of the survey.

When probed on potential areas of action in terms of policy interventions, participants suggested that an important starting point should be to consolidate and review existing policy resources. Once this mapping has occurred, they indicated that the availability and creation of various templates, toolkits and guidelines on the creation of OE policies would be important. In this context, Creative Commons expressed a willingness to collaborate with others to create template open policies for education policies, including but not limited to:

1. Open licensing policies on publicly funded educational resources (e.g., open licence required on publicly funded educational resources);
2. Open licensing policies on publicly funded research resources (e.g., 0 embargo period, open license on articles, data in the public domain); and
3. Promotion and tenure policies that support instructors who openly license and actively share their educational resources as OER.

In terms of implementation, it will be important to assist government lawyers as they are almost always involved in policy conversations and are sometimes not familiar with open licensing or OER.

### (a) Research and providing evidence for policy development in OER

Participants were in favour of creating a larger network of people who are researching policy issues and can pool their knowledge and data with a view to aiding continuous improvement. This network could also decide on topics for potential research studies.

Issues raised by participants for further research included gaining a better understanding about the policy approaches taken by different institutions or governments; understanding why certain policy approaches have been successful while others have not; and examining which existing policy frameworks are impeding OER and OE, therefore encouraging action to dismantle or revise them.

Research activities should work to generate demand and requests from the Member State governments. To date, although there are several offers to assist with policy formulation and implementation, participants stated that there is little to no demand or requests from governments. Research activities can examine the impact of policy and cost effectiveness, which can provide evidence in favour of OER policies, stimulating demand from Member State governments and institutions. One element of this might be to convene a meeting between Member States where they discuss where they are having challenges in implementing open policies and where they lack evidence (if they need research to institute change). The Dynamic Coalition might provide a platform where multiple governments can meet, outline research challenges and coordinate research activities.

Participants also highlighted the need for effective monitoring processes, asking where the responsibility for monitoring resides within the context of the OER Recommendation. They explained that stakeholders should work together to delineate expectations and provide support mechanisms for the UNESCO National Commissions to implement monitoring responsibilities for the recommendation, which will aid in ensuring OER adoption at the national level.

In addition, participants discussed the creation of a policy tool. This included a suggestion to use ethnographic consolidation of existing policies to create a tool that, instead of providing information about OER policy formulation, can guide the development process and provide support for the process. Examples of such tools can be found in Annex 3.

This session grappled with various policy interventions and possibilities, emphasizing that before developing new OER-related policies, the Coalition might consider analysing policies that already exist. The session also highlighted a need for sharing success, challenges, and lessons regarding policy formulation and implementation in different contexts.

## Session 5: Working Group 1 – Capacity Building

Following an introduction by Ms Varoglu, Dr Gihan Osman (Egypt), OER Dynamic Coalition Chair for Capacity Building, facilitated the session. Dr Osman noted that her co-Chair, Mr Skander Ghenia (Tunisia) could not be present, but had contributed to the presentation. Dr Osman indicated that the survey results show a need for research and collaboration as well as an emphasis on examining what resources exist. There is an emphasis on localizing models and conducting collaborative research. Participants' inputs for this session are highlighted below.

### (a) Existing and new capacity building materials

The group emphasized that there are many existing resources that focus on capacity building in OER. For example, Creative Commons (CC) has a Certificate Programme which teaches global audiences about different aspects of copyright, open licensing and the public domain. While the official training

is in English, the CC Certificate content is openly licensed for people to adapt, and has been translated into other languages (See Annex 3). The Programme is available in audio and book formats. SPARC, OERu, and Open Education Network all offer similar certificates.

Related to the available capacity building resources, teachers often ask for a certificate that is acknowledged by their governments or formal educational institutions which can count towards professional development points or licensure. When these incentives do not exist, teachers may be hesitant to participate in the capacity building opportunities. However, the system could take the OER that have been produced and put them into a format that is accepted by a government or educational institution. This would serve a dual purpose; it would raise awareness about capacity building activities and educators would be able to get the credentials that they need. One example of this in practice is that of the Commonwealth of Learning, which partners with Ministries of Education to work with teachers and train them in OER through its open schooling and teacher education models. These kinds of programmes could be expanded or replicated through the Dynamic Coalition in other Member States.

In addition to existing documented resources, there is also a wealth of undocumented potential OER that sit with current and retired teachers, which can be aggregated, curated, developed, translated and uploaded for a global audience. These materials could be posted on platforms such as OER World Map and might include curated collections.

Participants called for collaborative community translation efforts in trying to build OER capacity in multiple languages. In line with Session 3, they noted that focussing on multilingualism will be important – the Coalition should create opportunities for translating existing resources and capitalizing on open source infrastructure to deliver open courses for building capacity in OER. This might take the form of a common hub, such as the OER Hub, to review existing materials and adapt them.

Another priority area highlighted was to develop free learning materials for teachers and learners on how to create, use and publish OER. It was suggested that an audit be conducted of existing resources as well as where gaps exist with a view to creating a map of OER requirements. These activities should take into account the need for multilingual resources. In some cases, available content is not in a digital format. One possible solution was to capacitate students who work with digital materials to convert resources into digital formats.

Throughout the duration of the session, participants provided useful resources and offers to assist with capacity building efforts. These can be accessed in Annex 3.

Participants noted that hosting events and conferences can build awareness about OER amongst policymakers and other stakeholders, prepare them to advocate for OER, and support them in their efforts to develop and implement relevant policies and capacity building activities. Examples of such events include the regional Capacity Building Workshop on OER hosted in January 2020 by COL, UNESCO, and the William and Flora Hewlett Foundation, as well as dedicated leadership summits and Presidents' forums for higher education leaders hosted by the International Council for Open and Distance Education (see Annex 3).

### (b) Supporting collaborations among OER champions

The survey demonstrated that there are a lot of institutions undertaking key OER activities that often work in silos. This creates a significant opportunity to collaborate. OER champions play a central role in supporting collaboration. For example, many governmental or institutional policy and OE advancements can be attributed to efforts made by individual champions or national OE coalitions.

However, providing adequate resources and support for these champions is critical to sustaining and pushing these advancements. Participants provided examples of support structures in different parts of the world that serve as platforms for networking, sharing best practices, capacity building activities and multilingual collaboration (see Annex 3).

Questions for consideration included how to support the work of existing champions or national networks in different countries who often feel isolated or lack adequate support and resources, as well as how to identify, create and then support local champions and networks in different countries to advance OE. It was noted that the latter is included in the objectives of UNESCO's National Commissions.

Participants suggested that organizing work around knowledge domains (e.g. nursing) is an effective way of organizing collaborative and capacity building efforts. This allows communities to connect awareness around OER with the specific needs of that community. This might include collaborating with organizations who work in particular domains.

### (c) Research (Knowledge creation) and collaborative research

The survey highlighted a push for inter- and intra-regional, cross-national, and cross-institutional research. Participants indicated that some of this research might engage postgraduate students who can investigate what kinds of OER are being created around the world. Some parts of the world also need capacity building in terms of knowledge creation and research. The group emphasized that collaboration needs to be supported effectively and should be a central part of strategies, policies, and implementation.

To raise awareness about the merits of OER, participants suggested monitoring resources over time to be able to show the impact of OER and related policies, which could be used as a tool to demonstrate the growth of OER-related activities over time.

It became evident through the course of the session that there is a wealth of existing capacity building resources and efforts happening around the world. Participants contributed to a lively discussion about existing materials, how to support OER champions and collaborations, and what kind of research is necessary to advance capacity building efforts.

## Electronic Communication System

As this issue was addressed in all sessions, but represents a transversal theme, the outputs on this discussion are summarized in this section. The Dynamic Coalition is considering how to develop an electronic tool which will be a means:

- For the community to communicate with one another within and across projects;
- To provide public information on the Coalition's activities; and
- For stakeholders to collaborate on common projects and activities.

Possible options and collaborations for the e-tool were collated by respondents who took part in the survey. Participants in the Dynamic Coalition consultations were asked to provide inputs on the users' needs for the e-tool: who would use it, how they would use it, and what functionalities would be necessary. They were also asked to consider tools that allowed for data protection as well as openness and accessibility. To the point of inclusivity, participants recommended that the Dynamic Coalition adopt an 'Open first' policy when selecting tools for communication to ensure inclusivity.

Several points that were mentioned in the working group sessions bear relevance to the creation of such a tool. Considerations for accessibility include connectivity issues that users might experience and a possible need for both digital and analogue formats. Participants also suggested that the tool should be available in different languages and promote OER initiatives in different languages. They added that it should provide a space to share lessons and practices regarding contextualization, mobilize different volunteer communities and create different volunteer structures. With these different requirements in mind, a suggestion was made to differentiate between communication channels that are 'official' for the Coalition and those for the regional initiatives.

In terms of the types of tools, participants suggested tools that could perform the following functions:

- A space where documents can be shared;
- A live chat tool where people can share resources in real time;
- A master document where people who are new to the conversation can catch up;
- Discussion facilities;
- Online surveys;
- Web conferencing;
- Enterprise file sharing;
- Digital messaging;
- Social media;
- Automated email communication; and
- Wiki.

Most open source platforms have multilingual interface support that provide menus in different languages with filtering capabilities. This makes it possible for single servers to support multiple languages. Open source solutions will allow the Coalition to share technical approaches for governments and institutions to replicate these technologies. It was recommended that the Dynamic Coalition adopt a component-based solution that selects the optimal tools for specific functions instead choosing a single tool or solution. This approach minimizes dependencies as new and better solutions come along.

With regard to sharing tools and best practices within the policy context, it was noted that there is currently no tangible mechanism for policy advocates or policymakers and administrators to share information about practices, challenges, lessons, or build their networks. Although many institutions and organizations have made their policies freely available, there is very little sharing of day-to-day experiences. This highlights the need to create an online entry point aimed at those who are interested in affecting OER and OE policy changes. The UNESCO portal could be one of those platforms, while other possibilities include the OE Policy Hub. It will also be important to find some structure around policy implementation as the OER Recommendation is implemented across Member States, particularly because not every case of policy implementation is going to work in the same way, so understanding the challenges, impediments and solutions will be useful.

In reference to sharing challenges in policymaking, participants noted that some may not want to share their experiences publicly. A representative of the OE Policy Hub noted that it is possible to capture 'complete' policies, but it is difficult to register policymaking processes that are still in progress and to highlight successes, challenges and lessons learned. One potential solution to this was to set up a global network of observers. Each observer could head up a regional node, looking for policies and ensuring that case studies are written up and shared with other nodes. A second level of this structure might be country nodes. Findings could be collated on a global website.

Underlining these requirements is the need to develop an effective communications strategy at the institutional and government levels, outlining different arguments with regard to OER or OE resonate

with policymakers at all levels. This requires a more nuanced approach to policy advocacy and advice, highlighting the need to focus on an effective communications strategy.

Drawing from OER World Map's experience, there was a suggestion that together with the e-tool, there would be a need for human resources to support community development, including editors and people triggering communication and discussion on the tool.

Examples of existing tools can be found in Annex 3.

## Session 6: Closing

In wrapping up the consultation sessions, Ms Varoglu thanked all participants for attending the workshop. She stressed how important it was that the group was diverse and noted that the organizing team tried to accommodate as many people as possible.

Mr Hrastelj stressed the importance of adhering to the purpose of the Coalition. The Recommendation was adopted by UNESCO Member States, meaning that it is there to support governments to implement it. All activities should therefore aim to support governments as main stakeholders and partners in the implementation process.

Dr Jermol highlighted that with regard to AI, automatic translation and cyber security were two of the main points that came up in the sessions. These are two areas where AI is making progress. Beyond translation, AI can help creators and users of OER.

Last, Ms Carr outlined three areas that the discussions focussed on that both explicitly and implicitly related to Monitoring. These were:

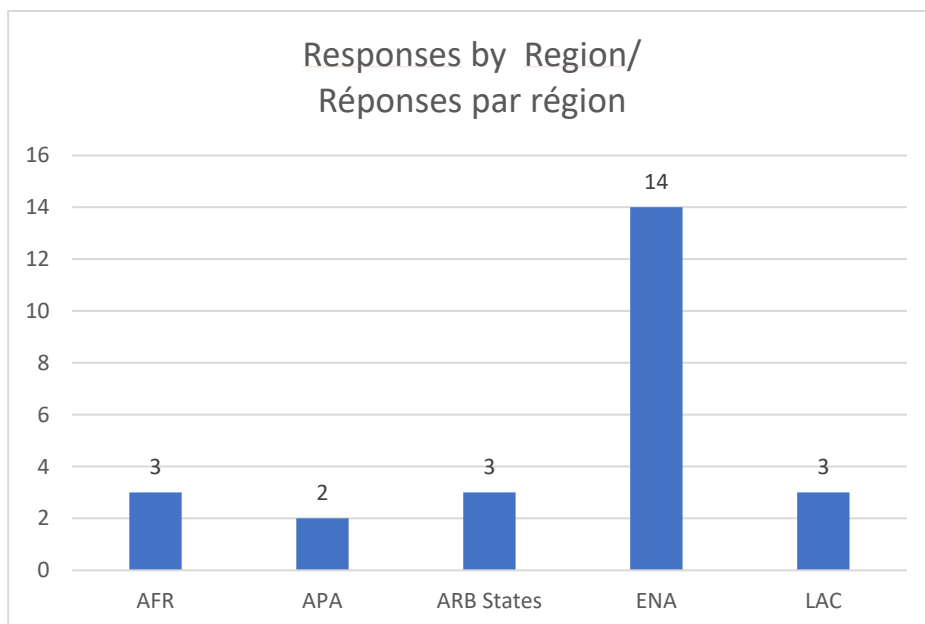
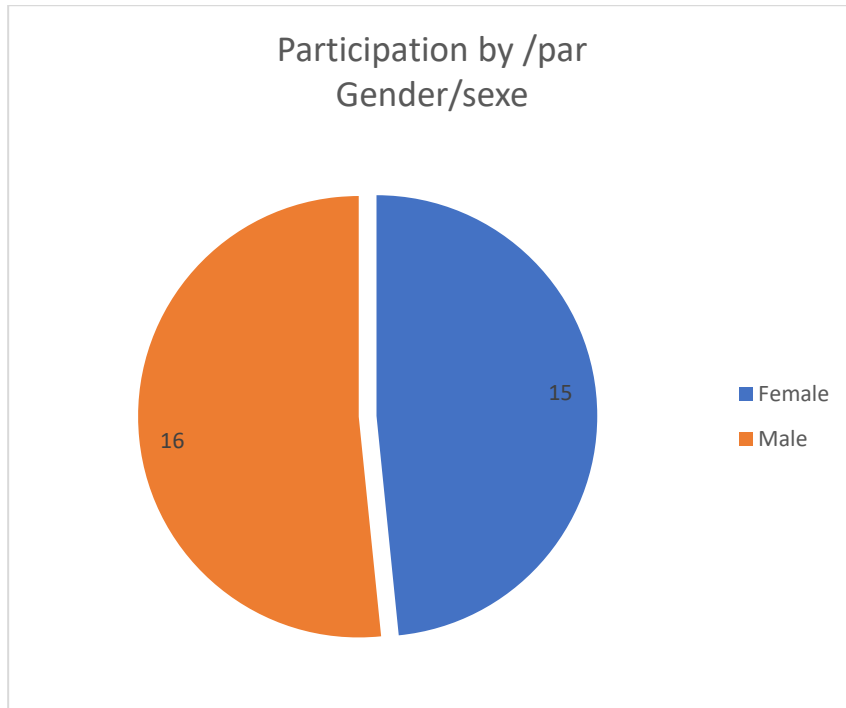
- Outputs and outcomes;
- Research; and
- Common platform/tool (which could be used for monitoring as well).

## Conclusion

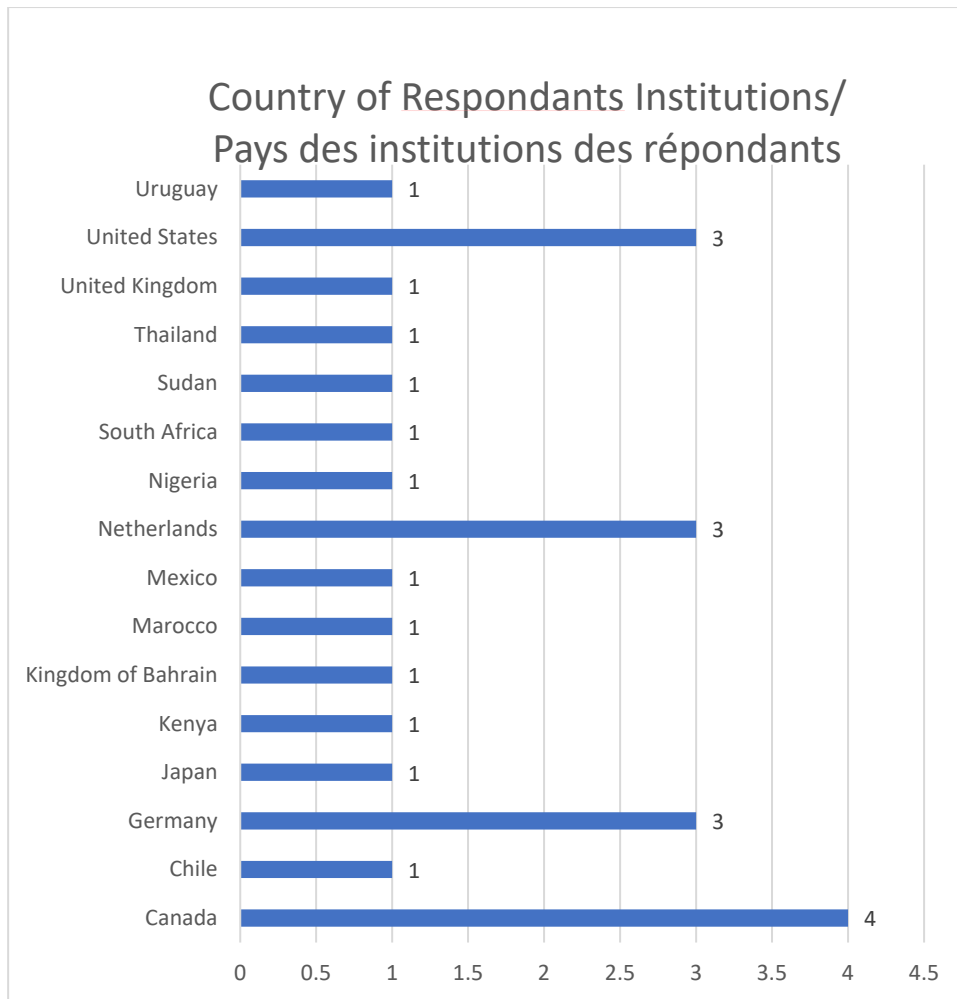
This three-day consultation provided a platform for rich conversation between a diverse group of participants. Thanks to the efforts of the organizers, facilitators and participants, valuable insights were collected across all four thematic Working Groups as well as the transversal Working Groups. These insights will inform the Dynamic Coalition's activities going forward. While highlighting pertinent challenges and lessons, the discussions also provided insight into the countless OER-related activities occurring around the world. This speaks to the multifaceted network of individuals, Member States, organizations, institutions and other stakeholders who can draw from one another in advancing the goals of the UNESCO OER Recommendation.

## Annex 1: Online survey results

### Demographic information of participants







## Session 2 - Working Group 4: Sustainability

### **WG 4: Sustainability [ENG]**

#### A. Reviewing and updating current provisions and procurement policies:

- Develop and share common frameworks across regions in OER development and utilization;
- Advocacy efforts for policy makers to make publicly funded educational materials openly licensed;
- Identify partner organizations that can help facilitate discussions and publish compelling case studies to inform policy makers;
- Encourage learners and teachers and researchers to learn about OER and participate in developing policies.

#### B. Catalyzing new sources for funding and resource sharing:

### **GT 4 : Durabilité [FR]**

#### A. Examiner et actualiser les dispositions actuelles et les politiques en matière d'achats

- Élaborer et partager des cadres communs entre les régions pour l'élaboration et l'utilisation de REL ;
- Mener des activités de plaidoyer pour inciter les décideurs politiques à mettre à disposition sous licence ouverte les matériels pédagogiques financés par des fonds publics Identifier les organisations partenaires qui peuvent aider à faciliter les discussions et publier des études de cas convaincantes pour informer les décideurs politiques;
- Inciter les apprenants, les enseignants et les chercheurs à s'informer sur les REL et à participer à l'élaboration de politiques.

- Consider partnerships with publishers to support the curation, creation and dissemination of OER;
- Encourage funding and collaboration in OER between and within regions;
- Emphasize the importance of multi-stakeholder activity to unlock sources of funding;
- Provide targeted support for individual countries to develop sustainability plans;
- Revise and reallocate existing budgets to support OER;
- Leverage taxes on the basis that all educational materials produced with public funds should be openly licensed;
- Examine small scale start up funding models and other new business models. This includes: creating new models that optimize open educational resources and practices as a public good, incentivizing community based models of content creation and sharing.

#### C. Supporting continuous improvement:

- Identify, share and apply common surveys and tools for reevaluating OER implementation;
- Create a review and improvement model;
- Use research to help define the value of OER;
- Develop and adopt feedback mechanisms for OER utilization and creation;
- Share curation of measures such as survey instruments.

#### D. Research:

- Use research to help define the value of OER.

#### B. Catalyser de nouveaux modèles de financement et de partage des ressources

- Encourager le financement et la collaboration en matière de REL entre et au sein des régions;
- Souligner l'importance d'une action multipartite pour débloquent des sources de financement;
- Fournir un soutien ciblé aux différents pays pour qu'ils élaborent des plans de durabilité;
- Réviser et réaffecter les budgets actuels de façon à soutenir les REL;
- Mettre à profit l'argent des contribuables pour favoriser l'octroi de licences ouvertes pour tous les matériels pédagogiques bénéficiant d'un financement public;
- Examiner les modèles de financement de démarrage à petite échelle et d'autres nouveaux modèles commerciaux. Cela suppose de : mettre au point de nouveaux modèles qui optimisent les ressources et les pratiques éducatives libres en tant que bien public ; de promouvoir des modèles communautaires de création et de partage de contenu ; et de nouer des partenariats avec les éditeurs pour soutenir la conservation, la création et la diffusion des REL.

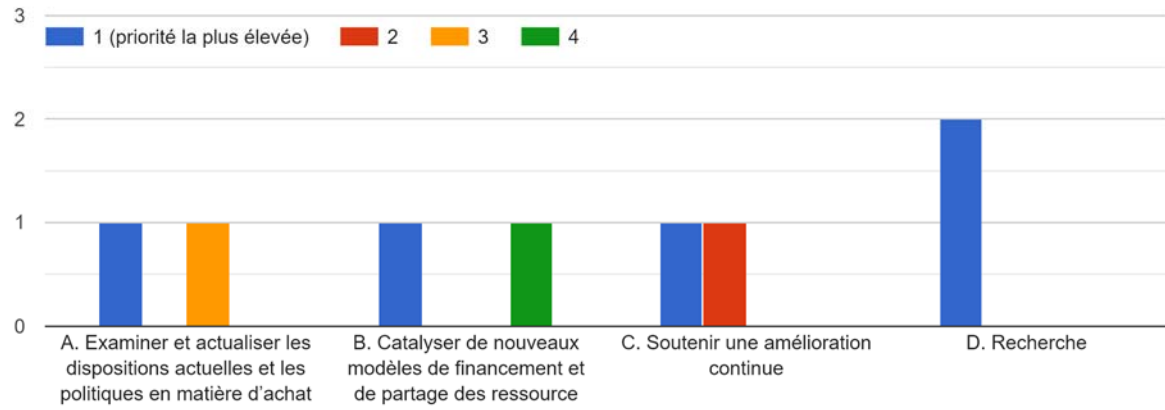
#### C. Soutenir une amélioration continue

- Recenser, partager et appliquer des enquêtes et outils communs pour évaluer la mise en œuvre des REL;
- Mettre au point un modèle d'examen et d'amélioration;
- Utiliser la recherche pour aider à définir la valeur des REL;
- Élaborer et adopter des mécanismes de retour d'information concernant l'utilisation et la création de REL;
- Partager la conservation des mesures, par exemple les instruments d'enquête.

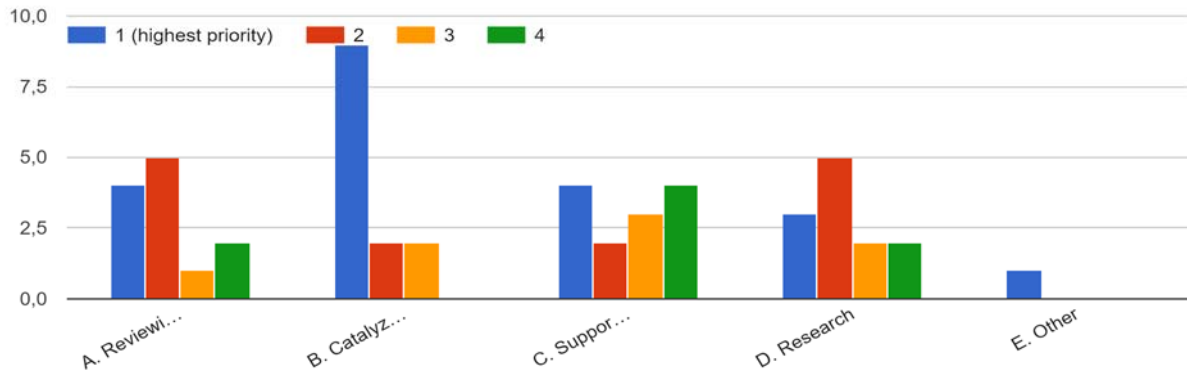
#### D. Recherche :

- Utiliser la recherche pour aider à définir la valeur des REL.

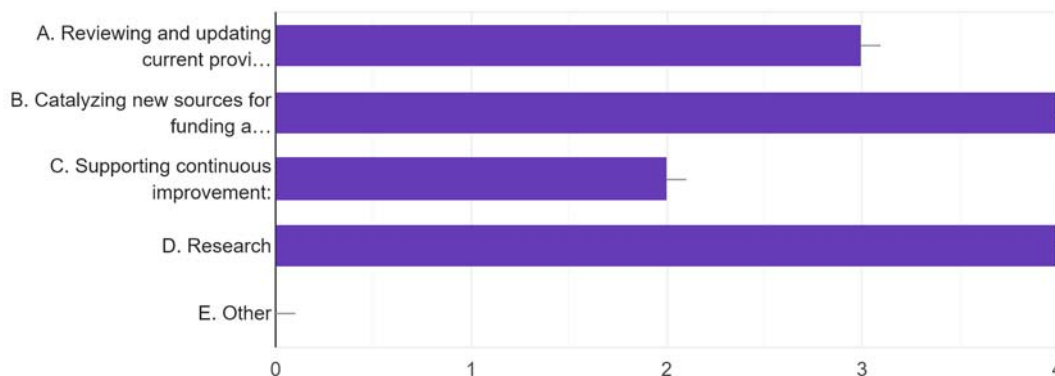
Si oui, veuillez classer votre opinion sur la priorité des activités à développer dans ce domaine [réponses à classer de 1 à 4, 1 étant la priorité la plus élevée]



If yes, please rank your opinion on the priority of the activities to be developed in this area [answers to be ranked from 1 to 4, 1 being the highest priority]



Ongoing Activities : Does your institution/organization have ongoing activities in this area that you would like to include on an electronic tool for in...alition activities? If so, please indicate the areas:  
7&nbsp;réponses



### Session 3 – Working Group 3: Quality Inclusive Multilingualism

#### **WG 3 : Inclusive ,Quality and Multilingual OER**

##### A. OER inclusivity

- Include use of assistive technologies and accessible formats;
- Initiate and support Communities of Practice made up of OER expert and Instructional Designers with expertise in accessibility issues;
- Ensure gender equality in all OER activities (with regard to participants, supporting access to funding, actors, beneficiaries); This includes identifying barriers to gender equality, and addressing them;
- Support access to OER initiatives and resources for those in remote areas;
- Share best practices and success stories of how OER can be used for, by and with persons in difficult or informal out of school contexts (e.g. OER to support educational opportunities for migrants and refugees);
- Showcase, monitor and map the impact of the use of accessible OER, making the case of viable practice;
- Develop, implement and showcase technical standards and best design practices for the USE/REUSE of OER on mobile devices, and related App development;

#### **GT3. Des REL inclusives, équitables et accessibles de qualité**

##### A. REL inclusives :

- Inclure l'utilisation de technologies d'assistance et de formats accessibles, y compris en appliquant la conception universelle de l'apprentissage dans les initiatives d'élaboration de politiques et de renforcement des capacités relatives aux REL;
- Lancer et soutenir des communautés de pratique constituées de spécialistes des REL et de concepteurs de matériel pédagogique compétents dans le domaine de l'accessibilité;
- Utiliser la conception universelle de l'apprentissage pour mettre au point des mécanismes visant à élaborer et partager des REL (y compris l'infrastructure TIC associée);
- Assurer l'égalité entre les sexes dans toutes les activités liées aux REL (participants, soutien pour l'accès au financement, acteurs, bénéficiaires), ce qui suppose d'identifier et d'éliminer les obstacles à l'égalité des sexes;
- Favoriser l'accès des personnes vivant dans des régions isolées aux initiatives et ressources liées aux REL;

- Collectively develop and disseminate shared definitions of what 'inclusion' means for OER users' capacity to create, access, re-use, adapt and redistribute OER;
- Link projects to specific community needs;
- Develop local leadership, peer networks, and grass roots engagement in regions to sustain the richness and diversity of local knowledge; Involving the whole creative value chain.

#### B. Multilingualism:

- Create a multilingual and accessible federated OER discovery system based on agreed upon common meta-data;
- Leverage AI for translation of OER;
- Use open formats and standards to promote ease in translation and contextualization;
- Recommend or define schemes for OER citation practices;
- Building Networks Activities (hackathons, book dashes a way to create or localize OER) – create a platform that calls for translations.

#### C. Quality Assurance:

- Development of QA criteria and descriptive tag development;
- Development of guidelines concerning QA Criteria for OER for QA and Recognition bodies;
- Sensitization of QA and Recognition bodies to OER issues that need to be integrated in review and accreditation processes at the course, institutional and governmental levels.

#### D. Research:

- Encourage research with communities of practices in the area of accessibility, inclusiveness, quality assurance and multilingualism to inform the development of OER by diverse communities for diverse communities of practice.

- Partager les meilleures pratiques et des exemples de réussite concernant l'utilisation des REL pour, par et avec des personnes qui se trouvent dans des situations difficiles ou dans des cadres « informels », hors du cadre scolaire (par exemple favoriser l'accès des migrants et des réfugiés à l'éducation)
- Mettre en évidence, suivre et recenser les effets de l'utilisation de REL accessibles, en promouvant des pratiques viables;
- Définir, appliquer et mettre en avant des normes techniques et les meilleures pratiques en matière de conception concernant l'utilisation/reutilisation des REL sur téléphone mobile et la mise au point d'applications connexes;
- Élaborer collectivement et diffuser des définitions communes des implications de l'« inclusion » pour la capacité des utilisateurs de créer, consulter, réutiliser, adapter et redistribuer les REL;
- Lier les projets aux besoins locaux spécifiques;
- Développer le leadership local, les réseaux de pairs et la mobilisation locale au niveau régional pour favoriser la richesse et la diversité des connaissances locales.

#### B. Multilinguisme :

- Créer un système fédéré multilingue et accessible de repérage de REL basé sur des métadonnées communes convenues collectivement;
- Mettre l'IA au service de la traduction des REL;
- Utiliser des formats et des normes ouverts pour faciliter la traduction et la contextualisation;
- Recommander ou définir des systèmes pour les pratiques de citation de REL.

#### C. Assurance qualité :

- Définition de critères d'assurance qualité et d'étiquettes descriptives;
- Élaboration de lignes directrices concernant les critères d'AQ pour les

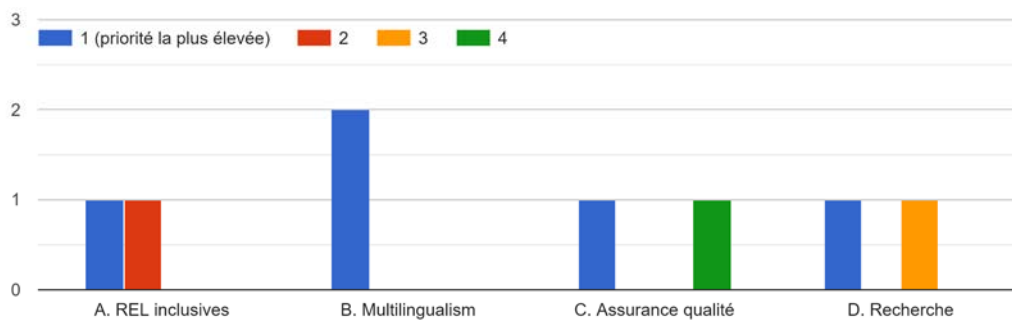
REL et les organismes d'AQ/de reconnaissance;

- Sensibilisation des organismes d'AQ et de reconnaissance aux questions relatives aux REL à intégrer dans les processus d'examen et d'accréditation au niveau des cours, des institutions et des gouvernements.

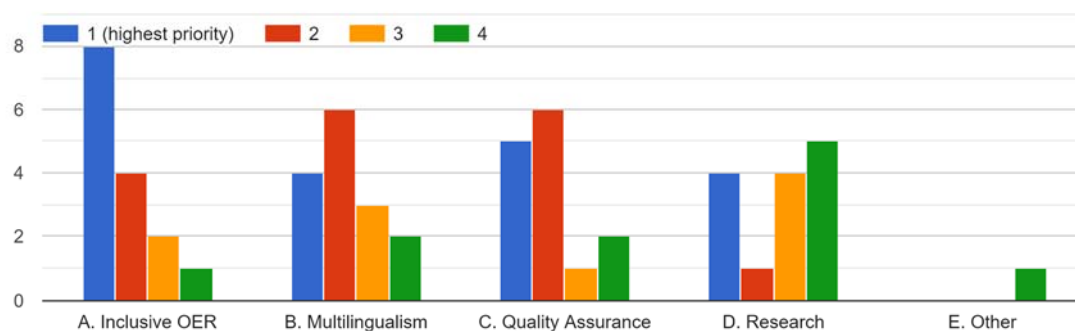
D. Recherche:

- Encourager la recherche en collaboration avec des communautés de pratique dans les domaines de l'accessibilité, de l'inclusion, de l'assurance qualité et du multilinguisme afin d'éclairer l'élaboration de REL par et pour diverses communautés de pratique.

Si oui, veuillez classer votre opinion sur la priorité des activités à développer dans ce domaine [réponses à classer de 1 à 4, 1 étant la priorité la plus élevée]

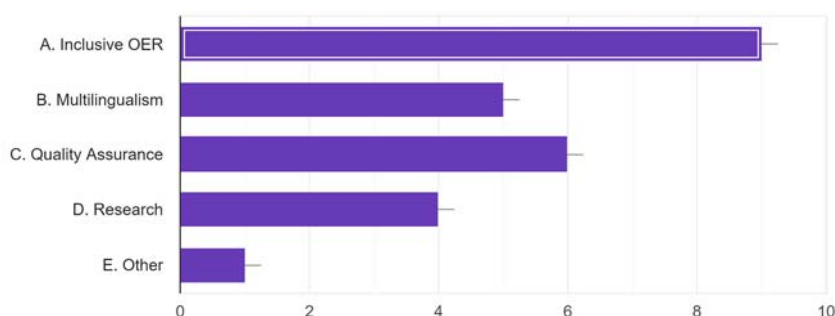


If yes, please rank your opinion on the priority of the activities to be developed in this area [answers to be ranked from 1 to 4, 1 being the highest priority]



Ongoing Activities : Does your institution/organization have ongoing activities in this area that you would like to include on an electronic tool for in...oalition activities? If so, please indicate the areas:

13&nbsp;réponses



## Session 4 – Working Group 2: Policy

### **WG 2 Policy [ENG]**

A. Identification, sharing of information on and support for:

- Development and implementation of institutional, governmental policies (including those that are stand alone and those integrated in policies related to other frameworks);
- Aligning OER related policies to open education, OA, prevailing IP policies;
- Regional and inter-regional frameworks that encourage embedding open licensing in public funded educational materials;
- Mechanisms and Tools to share information and best practices on policy issues inter- and intra-regionally;
- International multilateral frameworks which reinforce open access to information, data and transparency in education.

B. Encourage collaborative mechanisms to:

- Develop and implement tools to support the revision of copyright and IP policies and laws;
- Collectively develop templates based on analysis of existing good practices, national institutional policies;
- Encourage the development and/or implementation of policies that

### **GT 4 : Durabilité [FR]**

A. Recensement, partage d'information et appui concernant:

- l'élaboration et la mise en œuvre de politiques institutionnelles et gouvernementales (politiques distinctes ou intégrées dans des politiques liées à d'autres cadres);
- l'harmonisation des politiques relatives aux REL avec les politiques en vigueur dans les domaines de l'éducation ouverte, de l'accès libre et de la propriété intellectuelle; les autorités régionales et interrégionales qui encouragent la mise à disposition sous licence ouverte des matériels pédagogiques élaborés grâce à des fonds publics;
- les mécanismes et outils de partage d'informations et des meilleures pratiques en matière de politiques entre et au sein des régions;
- les structures multilatérales internationales qui renforcent l'accès libre à l'information et aux données et la transparence dans l'éducation.

B. Promouvoir des mécanismes de collaboration pour :

- concevoir et mettre en œuvre des outils à l'appui de la révision des

recognize OER users and creators, as well as policies that stimulate the creation, access, re-use, repurpose, adaption and redistribution quality OER by educator and learners;

- Develop and integrate policies that identify and address barriers for OER integration in education systems.

C. Research:

- Establish research networks to provide an evidence base for policy development in OER.

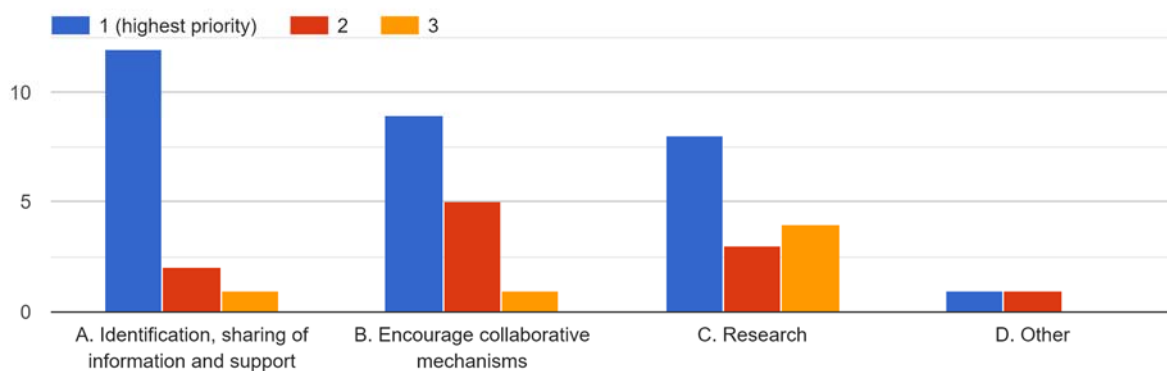
politiques et législations relatives au droit d’auteur et à la propriété intellectuelle;

- élaborer collectivement des modèles basés sur l’analyse des bonnes pratiques et des politiques institutionnelles nationales;
- encourager l’élaboration et/ou la mise en œuvre de politiques qui reconnaissent les utilisateurs et les créateurs de REL, et qui permettent de stimuler la création, la consultation, la réutilisation, l’utilisation à d’autres fins, l’adaptation et la redistribution de REL de qualité par les éducateurs et les apprenants;
- élaborer et intégrer des politiques permettant de repérer et d’éliminer les obstacles à l’intégration des REL dans les systèmes éducatifs.

C. Recherche :

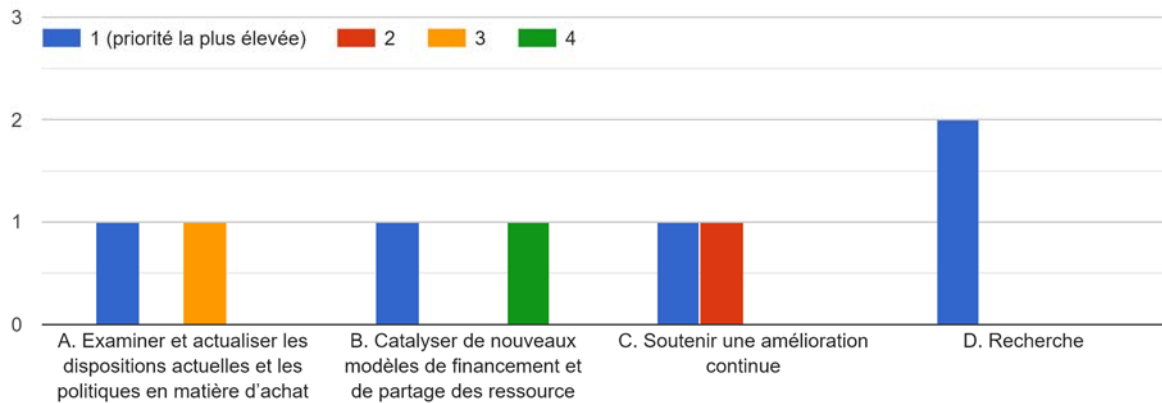
- créer des réseaux de recherche en vue de fournir des données factuelles pour étayer l’élaboration de politiques relatives aux REL.

If yes, please rank your opinion on the priority of the activities to be developed in this area [answers to be ranked from 1 to 4, 1 being the highest priority]

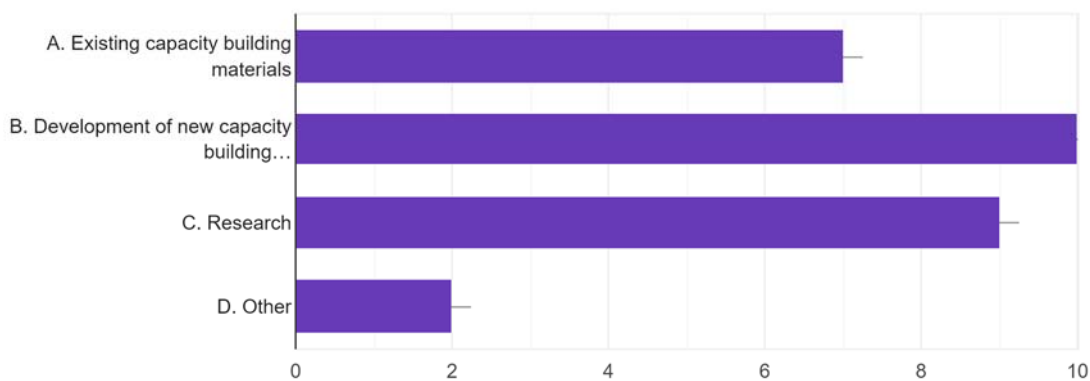




Si oui, veuillez classer votre opinion sur la priorité des activités à développer dans ce domaine [réponses à classer de 1 à 4, 1 étant la priorité la plus élevée]



Ongoing Activities : Does your institution/organization have ongoing activities in this area that you would like to include on an electronic tool for in...alition activities? If so, please indicate the areas:  
13&nbsp;réponses



## Session 5 – Working Group 1: Capacity Building

### **WG 1 – CAPACITY BUILDING [ENG]**

#### A. Existing Capacity Building Materials:

- Identify generic, specific and locally contextualized OER content;
- Sharing, wider dissemination, aggregation of repository systems with common quality standards and meta data, focus on multilingualism, accessibility, contextualization of courses to local needs (including language);

### **GT 1 – Renforcement des capacités [FR]**

#### A. Supports de renforcement des capacités existants:

- Recenser les contenus REL génériques, spécifiques et adaptés au contexte local;
- Partage, diffusion élargie, regroupement de systèmes de dépôt d'archives assortis de normes de qualité et de métadonnées communes, accent placé sur le

- Scale and amplify existing resources;
- Development of new capacity building materials;
- Identify gaps in available capacity building content resources, and collaborative solutions to address these gaps.

B. Development of new capacity building materials:

- Identify gaps in available capacity building content resources, and collaborative solutions to address these gaps.

C. Support collaboration amongst OER champions:

- Identifying existing OER champion practitioners, institutions, organizations and ensuring sharing of best practices for users' capacity to create, access, re-use, adapt and redistribute OER);
- Support co-creation of practical solutions based on existing best practices and evidence-based research;
- Support collaboration to contextualize resources to specific local needs;
- Support cross – language collaboration (e.g. amongst Hispanophone or Arabic – speaking partners in different continents and/ or countries);
- Create strong well facilitated regional hubs and platforms to share OER knowledge, tools and approaches.

D. Research:

- Encourage research with communities of practice to inform the development and implementation of OER;
- Create sabbatical and visiting scholarship exchanges between and within regions for training and research.

multilinguisme, accessibilité, contextualisation des cours en fonction des besoins locaux (y compris la langue);

- Généraliser et développer les ressources existantes.

B. Élaborer de nouveaux supports de renforcement des capacités:

- Repérer les lacunes dans les contenus de renforcement des capacités disponibles et définir des solutions collaboratives pour y remédier.

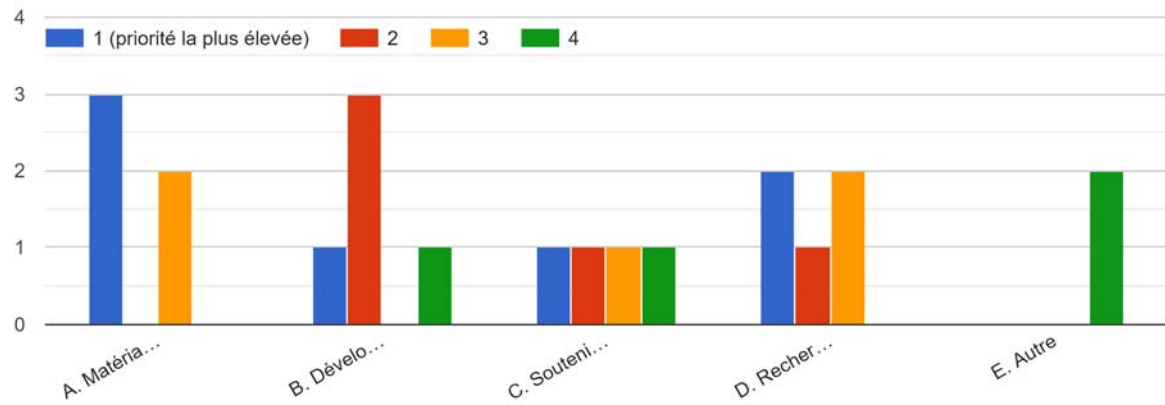
C. Encourager la collaboration entre les défenseurs des REL:

- Repérer des défenseurs, professionnels, institutions et organisations œuvrant en faveur des REL et assurer le partage des meilleures pratiques liées à la capacité des utilisateurs de créer, consulter, réutiliser, adapter et redistribuer les REL;
- Élaborer conjointement des solutions pratiques basées sur les meilleures pratiques existantes et sur la recherche fondée sur des données factuelles;
- Favoriser la collaboration pour contextualiser les ressources en fonction des besoins spécifiques locaux;
- Encourager la collaboration entre les langues (par exemple entre partenaires hispanophones ou arabophones de différents continents et/ou pays);
- Créer des plates-formes et des pôles régionaux solides et bien animés pour partager les connaissances, outils et approches liés aux REL.

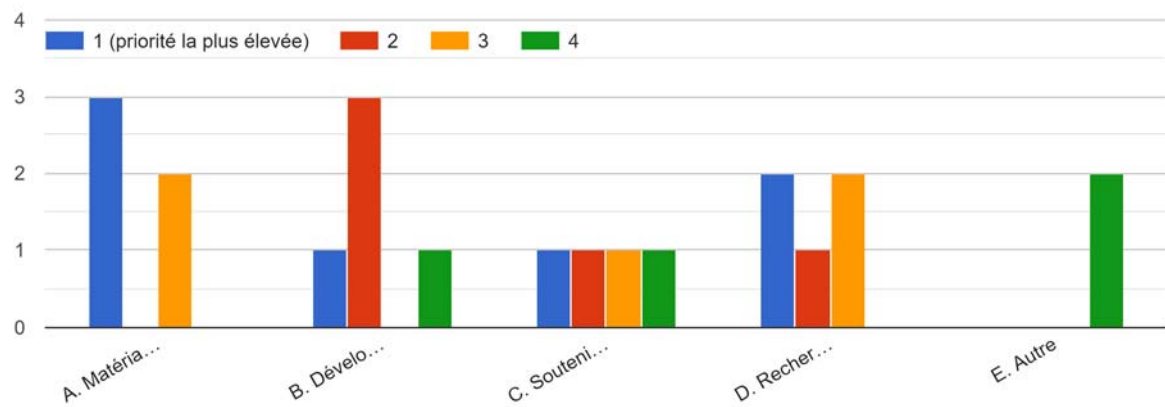
D. Recherche :

- Encourager la recherche en collaboration avec des communautés de pratique pour éclairer l'élaboration et la mise en œuvre des REL;
- Mettre en place des programmes de périodes sabbatiques et de bourses d'échange entre et au sein des régions pour la formation et la recherche.

Si oui, veuillez classer votre opinion sur la priorité des activités à développer dans ce domaine [réponses à classer de 1 à 4, 1 étant la priorité la plus élevée]



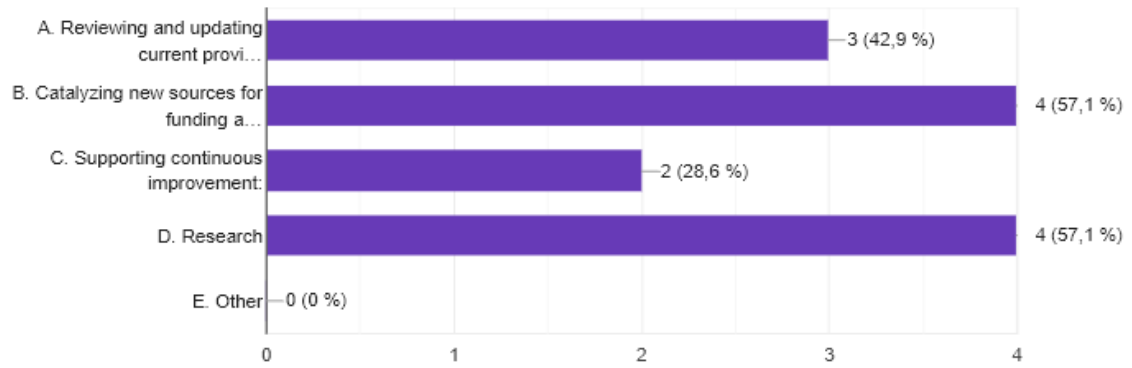
Si oui, veuillez classer votre opinion sur la priorité des activités à développer dans ce domaine [réponses à classer de 1 à 4, 1 étant la priorité la plus élevée]



Ongoing Activities : Does your institution/organization have ongoing activities in this area that you would like to include on an electronic tool for information sharing and collaboration on Dynamic Coalition activities? If so, please indicate the areas:



7 réponses



## Annex 2: Agenda

Date	AM	PM
<b>Wednesday, 22 July 2020</b>	<p><b>Opening: 11:00- 12:00</b>            Zeynep Varoglu, Organizer, CI, UNESCO HQ            Gasper Hrastelj, Nat Comm Chair, (Slovenia)            Mitja Jermol, AI/New Technologies Chair (Slovenia)            Alexis Carr, Monitoring Chair (COL)            Neil Butcher, Communications Chair, South Africa            Rapporteur: Neil Butcher, Communications Chair, South Africa</p>	<p><b>WG 4 Sustainability : 16:30 – 18:30</b>            Lisa Petrides, Chair Sustainability (United States)            Tel Amiel, Chair Sustainability (Brazil)            Rapporteur: Neil Butcher, Communications Chair, South Africa</p>
<b>Thursday 23 July 2020</b>	<p><b>WG 3 Quality Inclusive Multilingualism : 10:00 – 12:00</b>            Melinda Bandalaria, Chair Quality, Inclusive ,            Multilingualism (Philippines)            Papa-Youga Dieng, Chair, Quality, Inclusive            Multilingualism (OIF)             Rapporteur: Neil Butcher, Communications Chair, South Africa</p>	<p><b>WG 2 Policy: 16:30 – 18:30</b>             Jane-Frances Obiageli Agbu, Chair, Policy (Nigeria)            Maria Soledad Ramirez Montoya , Chair Policy (Mexico)            Rapporteur: Neil Butcher, Communications Chair, South Africa</p>
<b>Friday 24 July 2020</b>	<p><b>WG 1 Capacity Building : 10:00 – 12:00</b>            Gihan Osman, Chair Capacity Building (Egypt)            Skander Ghenia, Chair Capacity Building (Tunisia)             Rapporteur: Neil Butcher, Communications Chair, South Africa</p>	<p><b>Closing 16:00 – 17:00</b>            Zeynep Varoglu, Organizer, CI, UNESCO HQ            Gasper Hrastelj, Nat Comm Chair, (Slovenia)            Mitja Jermol, AI/New Technologies Chair (Slovenia)            Alexis Carr, Monitoring Chair (COL)            Rapporteur: Neil Butcher, Communications Chair, South Africa</p>

## Annex 3: Resources shared during consultations

Description	URL
<b>Working Group 4: Sustainability</b>	
Organizations that are providing sustainable services in Europe. Serlo in Germany, is an initiative established by students. The initiative receives money from different funders on a regular basis and hosts crowdfunding drives. Klascement is teacher-driven and is based on voluntary contributions. It hosts a portal that houses content created by teachers. In comparison, a Norwegian digital learning area, which received about 8 million Euro a year to create content and they follow a more publishing approach	<ul style="list-style-type: none"> <li>• Serlo: <a href="https://de.serlo.org/partner">https://de.serlo.org/partner</a> (funding driven)</li> <li>• Klascement: <a href="https://www.klascement.net/">https://www.klascement.net/</a> (state driven)</li> <li>• Nasjonal Digital Læringsarena: <a href="https://ndla.no/">https://ndla.no/</a></li> </ul>
Participants recommended collaborating with the Open Government Partnership (OGP), which focusses on open procurement through a complimentary lens.	<ul style="list-style-type: none"> <li>• OGP website: <a href="https://www.opengovpartnership.org/about/">https://www.opengovpartnership.org/about/</a></li> <li>• Link to procurement efforts: <a href="https://www.opengovpartnership.org/policy-area/open-contracting/">https://www.opengovpartnership.org/policy-area/open-contracting/</a></li> <li>• CC recently published an OGP blogpost making the case for open education work in OGP: <a href="https://www.opengovpartnership.org/stories/how-open-educational-resources-can-help-ogp-initiatives/">https://www.opengovpartnership.org/stories/how-open-educational-resources-can-help-ogp-initiatives/</a></li> </ul>
The first global MOOC quality criteria. The organization has developed an improvement model called the Quality Reference Framework for MOOCs. In addition, they have derived a checklist for beginners who are starting with MOOCs and they have a complete list of quality criteria for OER on MOOCs.	<ul style="list-style-type: none"> <li>• <a href="http://mooc-quality.eu/QRF">http://mooc-quality.eu/QRF</a></li> </ul>
OER Research links	<ul style="list-style-type: none"> <li>• <a href="https://openedgroup.org/review">https://openedgroup.org/review</a></li> <li>• <a href="http://oerhub.net">http://oerhub.net</a></li> </ul>
A ROER4D research sub-project from 3 countries in Latin America	<ul style="list-style-type: none"> <li>• <a href="https://roer4d.org">https://roer4d.org</a></li> </ul>
<b>Working Group 3: Quality Inclusive Multilingualism</b>	
Creative Commons is working with its global network to translate CC 4.0 licenses and CC0 into more languages	<ul style="list-style-type: none"> <li>• <a href="https://wiki.creativecommons.org/wiki/Legal_Tools_Translation#Translation_status_of_the_4.0_licenses_and_of_CC0">https://wiki.creativecommons.org/wiki/Legal_Tools_Translation#Translation_status_of_the_4.0_licenses_and_of_CC0</a></li> </ul>
Open Education for a Better World Programme A project leader in Nigeria developed resources in a local language related to climate changes issues specifically targeting Yoruba language speakers. A project leader in South Africa developing a glossary of simplified legal terminology in three different languages.	<ul style="list-style-type: none"> <li>• Programme website: <a href="http://oe4bw.ijs.si/projects/">http://oe4bw.ijs.si/projects/</a></li> <li>• Yoruba resources on climate change: <a href="https://www.yobamoodua.org/ayipada-oju-ojo/">https://www.yobamoodua.org/ayipada-oju-ojo/</a></li> <li>• South African example in three languages: <a href="http://oe4bw.ijs.si/project/multilingual-glossary/">http://oe4bw.ijs.si/project/multilingual-glossary/</a></li> </ul>
First international quality standard for technology-enhanced and online learning education: ISO/IEC 40180	<ul style="list-style-type: none"> <li>• Quality checklist for beginners of online learning and education: <a href="http://mooc-quality.eu/online-courses-checklist-beginners">http://mooc-quality.eu/online-courses-checklist-beginners</a></li> </ul>

Description	URL
	<ul style="list-style-type: none"> <li>Quality indicators for experts of online learning and education: <a href="http://mooc-quality.eu/online-courses-quality-criteria-experts">http://mooc-quality.eu/online-courses-quality-criteria-experts</a></li> </ul>
Publication on quality frameworks for open education	<ul style="list-style-type: none"> <li>Stracke, C. M. (2019). Quality Frameworks and Learning Design for Open Education. The International Review of Research in Open and Distributed Learning, 20(2), 180-203. [open access] DOI: <a href="http://www.doi.org/10.19173/irrodl.v20i2.4213">http://www.doi.org/10.19173/irrodl.v20i2.4213</a></li> </ul>
History, definitions and types of OER analysed in this research paper discussing the relationship between OER and MOOCs	<ul style="list-style-type: none"> <li>Stracke, C. M., Downes, S., Conole, G., Burgos, D., &amp; Nascimbeni, F. (2019). Are MOOCs Open Educational Resources? A literature review on history, definitions and typologies of OER and MOOCs. Open Praxis. 11(4), 331-341. doi:10.5944/openpraxis.11.4.1010 [Open Access] DOI: <a href="http://www.doi.org/10.5944/openpraxis.11.4.1010">http://www.doi.org/10.5944/openpraxis.11.4.1010</a></li> </ul>
The role of libraries in quality curation	<ul style="list-style-type: none"> <li>An example of a curation framework: <a href="https://iskme.libguides.com/c.php?g=932294&amp;p=6719733">https://iskme.libguides.com/c.php?g=932294&amp;p=6719733</a></li> <li>An OER curation framework for school librarians: <a href="https://docs.google.com/document/d/1wTzE7rKg9Kbz3t24TlxIjy_bEA81sDqVvwIXPC7OYA/edit">https://docs.google.com/document/d/1wTzE7rKg9Kbz3t24TlxIjy_bEA81sDqVvwIXPC7OYA/edit</a></li> </ul>
Guidelines on the Development of Open Educational Resources Policies	<ul style="list-style-type: none"> <li><a href="http://oasis.col.org/handle/11599/3455">http://oasis.col.org/handle/11599/3455</a></li> </ul>
COL has supported the development of OER in local languages particularly in non-formal learning	<ul style="list-style-type: none"> <li><a href="http://www.l3fpedia.com/aboutus.php">http://www.l3fpedia.com/aboutus.php</a></li> <li><a href="https://www.col.org/programmes/oer-skills-development/col-launches-world's-first-tamil-language-oer-federation-non">https://www.col.org/programmes/oer-skills-development/col-launches-world's-first-tamil-language-oer-federation-non</a></li> </ul>
<b>Working Group 2: Policy</b>	
COL has supported the development of OER in local languages, particularly in non-formal learning and would be eager to support in similar activities under the Dynamic Coalition.	<ul style="list-style-type: none"> <li><a href="http://www.l3fpedia.com/aboutus.php">http://www.l3fpedia.com/aboutus.php</a></li> <li><a href="https://www.col.org/programmes/oer-skills-development/col-launches-world's-first-tamil-language-oer-federation-non">https://www.col.org/programmes/oer-skills-development/col-launches-world's-first-tamil-language-oer-federation-non</a></li> </ul>
Guidelines developed by COL and UNESCO, which outline the approach for designing and implementing OER policies.	<ul style="list-style-type: none"> <li><a href="http://oasis.col.org/bitstream/handle/11599/3455/2_019_Guidelines_OER_Policy_final_COL_web.pdf">http://oasis.col.org/bitstream/handle/11599/3455/2_019_Guidelines_OER_Policy_final_COL_web.pdf</a></li> </ul>
OER World Map has started collecting policies and is building on Creative Commons' collection. There are currently 222 policies registered on the OER World Map. They are also building a new page which will focus on policymaking. In addition, they are going to develop a course	<ul style="list-style-type: none"> <li><a href="https://oerworldmap.org/resource/?filter.about.%40type=%22Policy%22">https://oerworldmap.org/resource/?filter.about.%40type=%22Policy%22</a></li> </ul>
If lawyers in National Ministries / Departments of Education have legal questions about copyright and open licensing, please contact the CC Open Education team.	<ul style="list-style-type: none"> <li>Cable Green: <a href="mailto:cable@creativecommons.org">cable@creativecommons.org</a></li> <li>Jennryn Wetzler: <a href="mailto:jennryn@creativecommons.org">jennryn@creativecommons.org</a></li> </ul>
As the leading global membership organization for open and distance education, ICDE has been engaged and involved in the OER agenda since the term OER was adopted by UNESCO in 2002, see the report	<ul style="list-style-type: none"> <li>Forum on the Impact of Open Courseware for Higher Education in Developing Countries: <a href="https://static1.squarespace.com/static/5b99664675f9eea7a3ecee82/t/5be1d461575d1fdd2112a098/1541526625796/UNESCO%27s+2002+Forum+on+Open+Courseware.pdf">https://static1.squarespace.com/static/5b99664675f9eea7a3ecee82/t/5be1d461575d1fdd2112a098/1541526625796/UNESCO%27s+2002+Forum+on+Open+Courseware.pdf</a></li> </ul>

Description	URL
<p>ICDEs policy related activities to OER are anchored its overall strategic plan and activity plan, as well as activities performed by our OER Chairs and OER Advocacy Committee, for example:</p> <ul style="list-style-type: none"> <li>• Contributions to the OER Policy Registry and OER World Map</li> <li>• Extended partnerships</li> <li>• A global survey, developed by ICDEs OER Advocacy Committee, that aims to contribute to a first mapping of the status of the implementation of the UNESCO OER Recommendation in various regions.</li> </ul>	<ul style="list-style-type: none"> <li>• Extended partnerships example: <a href="https://oer4covid.oeru.org/">https://oer4covid.oeru.org/</a></li> <li>• Global survey invitation letter for mapping the implementation of the OER Recommendation: <a href="https://mcusercontent.com/2c137fb8d5b2c00e44c649471/files/ff1a35fb-ec09-411e-9c18-b451b68a92d8/Survey_Formal_Invitation_letter.pdf">https://mcusercontent.com/2c137fb8d5b2c00e44c649471/files/ff1a35fb-ec09-411e-9c18-b451b68a92d8/Survey_Formal_Invitation_letter.pdf</a></li> </ul>
<h2 style="color: #4F81BD;">Working Group 1: Capacity Building</h2>	
<p>All CC Certificate content is OER (CC BY licensed) and may be used and remixed by anyone. The Certificate content is currently available in English, Arabic and Italian.</p>	<ul style="list-style-type: none"> <li>• Certificate Resources: <a href="https://certificates.creativecommons.org/about/certificate-resources-cc-by/">https://certificates.creativecommons.org/about/certificate-resources-cc-by/</a></li> <li>• Translations: <a href="https://certificates.creativecommons.org/about/translations">https://certificates.creativecommons.org/about/translations</a></li> </ul>
<p>People can add training resources, from full courses to guides to the OER world map, so people from different regions can find relevant resources for them. The items can be described in any languages, and you can use keywords to help people retrieving them. CC moved its OER Policy Registry to the OER World Map so anyone can search for open education people, projects AND policies all in one place.</p>	<ul style="list-style-type: none"> <li>• OER World Map: <a href="https://oerworldmap.org">https://oerworldmap.org</a></li> </ul>
<p>Courses aiming at building educators' capacity with OER and OEP:</p>	<ul style="list-style-type: none"> <li>• The OpenMed course (available in EN, FR and AR) and co-developed by universities from Europe, Egypt, Palestine, Jordan and Morocco: <a href="https://openmedproject.eu/">https://openmedproject.eu/</a></li> <li>• A new game on Open Education will be produced in October by the OpenGame project: <a href="https://opengame-project.eu/">https://opengame-project.eu/</a></li> <li>• A self-assessment and capacity building tool called Open Educator Factory: <a href="https://rd.unir.net/pub/oef/login.php">https://rd.unir.net/pub/oef/login.php</a> with more than 1000 users.</li> <li>• The OERUp course on OER for adult learning: <a href="http://www.oerup.eu/about/the-project/">http://www.oerup.eu/about/the-project/</a></li> </ul>
<p>Creative Commons is building a new Certificate (and other resources) for Galleries, Libraries, Archives and Museums (GLAM) to help make cultural works in museums and archives openly available to the world. All content will be licensed CC BY.</p>	<p>Forthcoming</p>
<p>Creative Commons hosts an "Open Education Platform" (working group) to support collaboration amongst open education champions (novice to expert): it currently has 1070 members from 78 countries. It is free to join.</p>	<ul style="list-style-type: none"> <li>• <a href="https://network.creativecommons.org/cc-open-education-platform">https://network.creativecommons.org/cc-open-education-platform</a></li> </ul>
<p>OE LATAM Regional node, created with the purpose of promoting and fostering collaboration in Latin America.</p>	<ul style="list-style-type: none"> <li>• <a href="http://www.oelatam.org">www.oelatam.org</a></li> </ul>

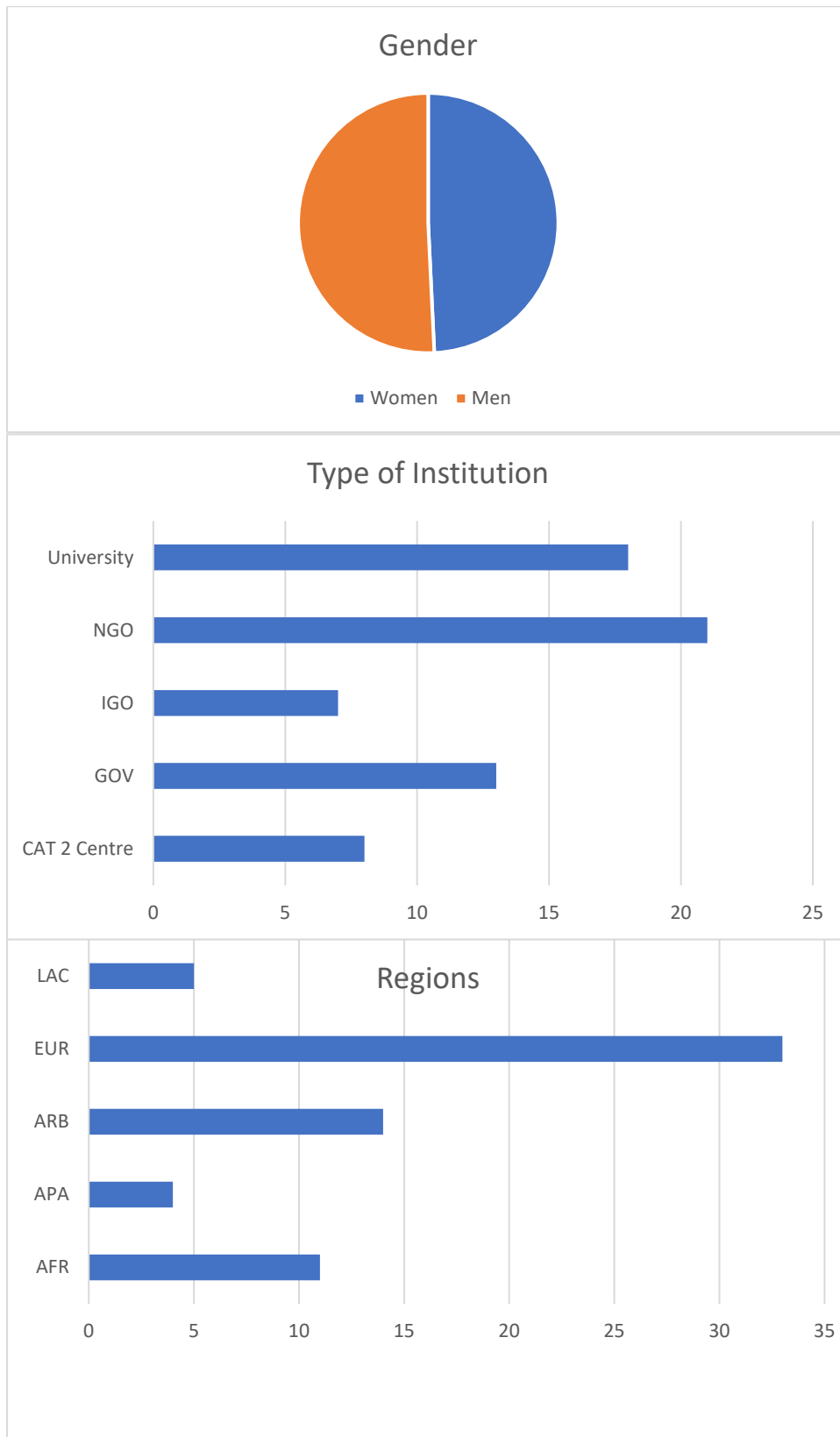


Description	URL
Adding not only current resources but creating new ones that address the localized needs of the region in content and language.	
Community College Consortium for OER in US	<ul style="list-style-type: none"> <li>• <a href="https://www.ccoer.org/">https://www.ccoer.org/</a></li> </ul>
OEG Connect, an open tool for communication and collaboration	<ul style="list-style-type: none"> <li>• <a href="https://connect.oeglobal.org/">https://connect.oeglobal.org/</a></li> </ul>
UNESCO has a hub curated by partner countries aligned to UNESCO's Competency Framework for Teachers. It is intended to inform educational policy makers, providers of professional learning and working teachers on the role of ICT in educational reform, as well as to assist Member States in developing national ICT competency standards for teachers with an ICT in Education Master Plan approach	<ul style="list-style-type: none"> <li>• <a href="https://www.oercommons.org/hubs/unesco">https://www.oercommons.org/hubs/unesco</a></li> </ul>
In the public library, OER Commons, the ALECSO OER hub promotes the use, development and sharing of OER in the Arab region. This hub contains collections of OER curated by ALECSO and partner countries	<ul style="list-style-type: none"> <li>• <a href="https://www.oercommons.org/hubs/alecso">https://www.oercommons.org/hubs/alecso</a></li> </ul>
SEAMEO developed SEA MOOCS Network where online learning resources can be shared and OER can be upload for certificate or for capacity building. It is a partnership between SEAMEO Centres and Open Univesities in Southeast Asia as well as Ministries of Education.	<ul style="list-style-type: none"> <li>• <a href="http://seamoooc.seameo.org">http://seamoooc.seameo.org</a></li> </ul>
The Philippines has capacity building on the use, development, and sharing of OER, especially for blended teaching and learning and in online learning. There is also a repository of OER that the university developed at	<ul style="list-style-type: none"> <li>• Capacity building: <a href="http://model.upou.edu.ph">model.upou.edu.ph</a></li> <li>• Repository: <a href="http://networks.upou.edu.ph">networks.upou.edu.ph</a></li> </ul>
REBIUN (the Spanish Network University Libraries) is working on a Spanish translation of the Ontario OER Toolkit (available soon) and has published a report about the situation of OER in the institutional repositories of Higher Education and some recommendations to improve them.	<ul style="list-style-type: none"> <li>• <a href="http://hdl.handle.net/20.500.11967/243">http://hdl.handle.net/20.500.11967/243</a></li> </ul>
Checklist for beginners and experts on open online learning	<ul style="list-style-type: none"> <li>• Beginners: <a href="http://mooc-quality.eu/online-courses-checklist-beginners">http://mooc-quality.eu/online-courses-checklist-beginners</a></li> <li>• Experts: <a href="http://mooc-quality.eu/online-courses-quality-criteria-experts">http://mooc-quality.eu/online-courses-quality-criteria-experts</a></li> </ul>
Research started on connecting and combining Open Education and Open Science.	<ul style="list-style-type: none"> <li>• <a href="http://link-springer-com-443.webvpn.fjmu.edu.cn/chapter/10.1007%2F978-981-15-4276-3_2">http://link-springer-com-443.webvpn.fjmu.edu.cn/chapter/10.1007%2F978-981-15-4276-3_2</a></li> </ul>
COL's online course on OER provides distilled information and links to additional resources to enable the learner to pursue deeper interests in specific aspects of OER.	<ul style="list-style-type: none"> <li>• <a href="https://www.col.org/news/news/online-course-open-educational-resources">https://www.col.org/news/news/online-course-open-educational-resources</a></li> </ul>
Collection of resources curated by Robert Schuwer	<ul style="list-style-type: none"> <li>• <a href="https://www.robertschuwer.nl/?page_id=2660">https://www.robertschuwer.nl/?page_id=2660</a></li> </ul>
ICDE contributes through projects, events and the curation of capacity building material, as well as activities performed by our OER Chairs and OER Advocacy Committee	<ul style="list-style-type: none"> <li>• <a href="https://www.icde.org/open-education-resources-oer">https://www.icde.org/open-education-resources-oer</a></li> </ul>
<p>Since March 2020, ICDE has launched several new activities relevant for capacity building</p> <ul style="list-style-type: none"> <li>• Co-branded promotion of five OER based online micro courses in collaboration with UNESCO and OERu</li> </ul>	<ul style="list-style-type: none"> <li>• Micro-courses in collaboration: <a href="https://www.icde.org/icde-news/unesco-oeru-icde-collaborate">https://www.icde.org/icde-news/unesco-oeru-icde-collaborate</a></li> </ul>

Description	URL
<ul style="list-style-type: none"> <li>• The launch of an OER Francophone working group with partners from several virtual universities in Francophone Africa, The French Ministry of Education, the French Thematic University</li> <li>• A translation pilot of the OERu micro course: Open Education, Copyright and Open Licencing in a Digital World to French in collaboration with UNESCO and OERu (to be launched late 2020)</li> </ul>	
<p>ICDE is engaged in OER related capacity building on a practitioner/academic level as well as the leadership level. They host annual dedicated leadership summits and Presidents' forums for HEI leaders/rectors/presidents. Through their global network of HEI leaders from 190 universities in various world regions, plus individual members/experts and partner organizations, similar activities can be replicated in the future.</p>	<ul style="list-style-type: none"> <li>• <a href="https://www.icde.org/events-listings/2018/12/4/open-education-leadership-summit-from-2018">https://www.icde.org/events-listings/2018/12/4/open-education-leadership-summit from 2018</a>.</li> </ul>
<p><b>Communication Tools</b></p>	
<p>Open source options for a variety of communication functions</p>	<ul style="list-style-type: none"> <li>• Discussion / list serve: <a href="#">Discourse</a></li> <li>• Online surveys: <a href="#">Limesurvey</a></li> <li>• Web conferencing: <a href="#">BigBlueButton</a></li> <li>• Enterprise File sharing: <a href="#">Nextcloud</a></li> <li>• Digital messaging: <a href="#">Rocket.Chat</a></li> <li>• Social media: <a href="#">Mastodon</a></li> <li>• Automated email communication: <a href="#">Mautic</a></li> <li>• Wiki - <a href="#">Mediawiki</a></li> </ul>
<p>Other communication tools</p>	<ul style="list-style-type: none"> <li>• <a href="#">WhatsApp</a></li> <li>• <a href="#">Slack</a></li> </ul> <p>(Note: Both are proprietary platforms)</p>

## Annex 4: Demographic Overview and List of participants

### Demographic Overview



## Participation List - Online Consultation 22 to 24 July 2020

Family name	First name	Gender	Position <sup>3</sup>	Institution	Institution type	Country <sup>4</sup>	Global Region
Agboh	Koffi Michel	M	Secrétaire général	Togo National Commission to UNESCO	GOV	Togo	AFR
Agbu	Jane-Frances Obiageli	F	Director, NOUN-Abuja Study Centre	National Open University of Nigeria (NOUN)	University	Nigeria	AFR
Ahmed	Ilyas	M	Animateur des sessions de formations sur le numérique	Université de Djibouti	University	Djibouti	AFR
Al Sayed	Estiqlal	M	Educational Resources specialist	RCICT	Cat 2 Centre	Bahrain	ARB
Alhussaini	Fatima	F	Learning technology specialist	RCICT	Cat 2 Centre	Bahrain	ARB
Ali	Maryam	F	Technology Specialist	RCICT	Cat 2 Centre	Bahrain	ARB
Alkowari	Suha	F	Representative	RCICT	Cat 2 Centre	Bahrain	ARB
Almajed	Mohammed	M	IT Support	RCICT	Cat 2 Centre	Bahrain	ARB
Alshurooqi	Mariam	F	Educational technology senior specialist	RCICT	GOV	Bahrain	ARB
Alzubari	Saad	M	Computer Programs Specialist	RCICT	Cat 2 Centre	Bahrain	ARB
Antenas	Javiera	F	Researcher	OE Policy Hub - Lab	NGO	USA	ENA
Bajjnath	Mohini	F	Researcher	OER Africa	NGO	South Africa	AFR
Bandalaria	Melinda	F	Chancellor and Professor	University of the Philippines Open University	University	Philippines	APA
Baroud	Fawzi	M	UNESCO Chair in OER	Notre Dame University	University	Lebanon	ARB
Bernabew Ramos	Raquel	F	Director	SEP	NGO	United States	ENA
Bernard	Noelie	F	Chargée de mission	CNFU	GOV	France	ENA
Borghino	Jose	M	Secretary General	International Publishers Association	NGO	Switzerland	ENA

<sup>3</sup> Position within institution

<sup>4</sup> Country in which institution is based

Butcher	Neil	M	OER Strategist	OER AFR	NGO	South AFR	AFR
Carr	Alexis	F	Research Coordinator	Commonwealth of Learning	IGO	United States	ENA
Daily	Una	F	Director, CCCCOER	Open Education Global	NGO	USA	ENA
Dieng	Papa-Youga	M	Coordonnateur IFADEM	Organisation internationale de la francophonie	IGO	Senegal	AFR
Dubourg-Lavroff	Sonia	F	Conseillère	Commission nationale française pour l'UNESCO	GOV	France	ENA
Echterhoff	Charlotte	F	Scientific Advisor	DLR-Projektträger	NGO	Germany	ENA
Elizalde	Alejandro Velazquez	M	Subdirector de Área	Secretaría de Educación Pública	GOV	Mexico	LAC
Ganz	Mario	M	Scientific Advisor	DLR Projektträger	NGO	Germany	ENA
Ghenia	Skander	M	Directeur Général du Numérique	Ministère de l'Education	GOV	Tunisa	ARB
Green	Cable	M	Interim CEO & Director of Open Education	Creative Commons	NGO	United States	ENA
Havermann	Leo	M	Researcher	OE Policy Hub (OER World Map) / Open University	NGO	United Kingdom	ENA
Hrastelj	Gaspar	M	Deputy Secretary General	UNESCO Natcom	GOV	Slovenia	ENA
Ishmael	Kristina	F	Director of Primary & Secondary	Open Education Global	NGO	United States	ENA
Janssen	Ben	M	Researcher	OpenEd Consult	NGO	Netherlands	ENA
Jermol	Mitja	M	Director	Josef Stefan Institute	University	Slovenia	ENA
laaziz	ilham	F	Directrice	Programme GENIE , Ministère de l'Education Nationale de la formation professionnelle de l'enseignement supérieur et de la recherche scientifique	GOV	Maroc	ARB
Landa	Karen	F	Consultant	UNESCO	IGO	France	ENA
Lesko	Igor	M	Director of Operations	Open Education Global	NGO	Slovakia	ENA
Mackintosh	Wayne	M	UNESCO Chair in OER / Managing Director	OER Foundation / OERu	NGO	New Zealand	APA
Maiyaki	Christopher	M	Director	National Universities Commission	GOV	Nigeria	AFR
McGreal	Rory	M	OER Chair	Faculty of Humanities and Social	University	Canada	ENA

				Sciences, Athabasca University			
Mohammad	Rania Edrees	F	Lecturer	Open University of Sudan	University	Sudan	ARB
Morales	Marcela	F	Community Relations Director	Open Education Global	NGO	Mexico	LAC
Nascimbeni	Fabio	M	Assistant Professor	Universidad Internacional de La Rioja	University	Spain	ENA
Ndlovu	Nokulunga	F	Lecturer	University of the Witwatersrand	University	South Africa	AFR
Neumann	Jan	M	Head of Legal Affairs and Organization	North Rhine-Westphalian Library Service Centre (hbz)	GOV	Germany	ENA
Olivier	Jako	M	UNESCO Chair in Multimodal Learning	North-West University (NWU)	University	South Africa	AFR
Orlic	Davor	M	Researcher	Josef Stefan Institute	University	Slovenia	ENA
Osman	Gihan	F	Assistant Professor of Instructional Design and Technology	The American University in Cairo	University	Egypt	ARB
Petrides	Lisa	F	CEO and Founder	Institute for the Study of Knowledge Management in Education (ISKME)	NGO	United States	ENA
Proudman	Vanessa	F	Director	SPARC Europe	NGO	Netherlands	ENA
Ramirez Montoya	Maria Soledad	F	OER Chair	Tecnologico de Monterrey	University	Mexico	LAC
Saad	Nichole	F	Senior Program Manger, Education	Wikimedia Foundation	NGO	United States	ENA
Santos	Gema	F	Associated Professor ; Research Digital Librarian	University of Pompeu Fabra ; Open University of Catalonia	University	Spain	ENA
Schrimpf	Philip	M	Representative	UNESCO German National Commission to UNESCO	GOV	Germany	ENA
Schuer	Robert	M	Professor	Fontys University of Applied Sciences	University	Netherlands	ENA
Shamandy	May Yaseen	F	Director a.i.	RCICT	Cat 2 Centre	Bahrain	ARB
Sharaf	Hanan	F	Learning technology specialist	RCICT	Cat 2 Centre	Bahrain	ARB
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