



Report

Latin America and Caribbean Regional Consultation on Open Educational Resources

OER for Inclusive and Equitable Quality Education: From Commitment to Action

> April 3-4, 2017 Golden Tulip Paulista Plaza, São Paulo, Brazil







REPUBLIC OF SLOVENIA MINISTRY OF EDUCATION, SCIENCE AND SPORT





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Background

Overview of the Latin American and Caribbean Regional Consultation on OER

The World OER Congress 2012, organized by the Commonwealth of Learning (COL) and UNESCO with the generous support of The William and Flora Hewlett Foundation, led to the adoption of the OER Paris Declaration by delegates from 70 countries. At that time, the global open educational resources (OER) community focused on securing governmental support for OER. Since 2012, many governments and educational institutions have committed to policies in support of OER, and there is increased awareness and funding in many countries for the creation and distribution of OER. To mark the five-year anniversary of the OER Paris Declaration, and to review the progress made so far, the Hewlett Foundation supported COL in organizing six regional consultations in collaboration with UNESCO, the Government of Slovenia, and other partners. These consultations will lead to the 2nd World OER Congress, which will be held in Slovenia in September 2017 and will be organized by UNESCO and the Government of Slovenia.

The Latin America and Caribbean OER Regional Consultation provided a renewed commitment by the participants to develop policies around Open Educational Resources with the help of COL and UNESCO. The theme of the regional consultation was "OER for Inclusive and Equitable Quality Education: From Commitment to Action."

The key priorities and needs of the Latin and Caribbean region include electricity, water and healthcare. Quality basic education also remains a necessary area of focus to meet <u>Sustainable Development Goal 4</u> (SDG4). The expected outcome of the regional consultation was to devise collaborative consensus-based strategies to reach SDG4, building on the complementarity of the Latin American and the Caribbean nations. Held over two days, the workshop suggested examples and models available for mainstreaming OER in support of achieving SDG4. The agenda for the meeting can be found on the <u>RCOER website</u>, and is available in Annex 1.

Goals

The main objectives of the regional consultation were to:

- Review the progress of OER since the World OER Congress 2012;
- Identify strategies for mainstreaming OER;
- Agree on action points that can be presented at the 2nd World OER Congress;
- Showcase innovative and promising practices in OER policies and initiatives in the region.

Partners

COL organized the Latin America and Caribbean consultation with the collaboration and support of the following partners:

- UNESCO
- University of Campinas, Brazil
- Government of Slovenia
- William and Flora Hewlett Foundation

Participants

The Latin America and the Caribbean RCOER brought together government officials and key stakeholders in the region to share policy initiatives and OER practices, and to discuss concerns and issues for mainstreaming OER to support inclusive and equitable quality education. A total of 32 participants from 18 countries attended the consultation. An additional delegation of 29 from Brazil participated in the opening session of day 1. The full list of participants can be found on the RCOER website, and is available in Annex 2.

Country	No. participants	Country	No. participants
Antigua and Barbuda	1	Jamaica	1
Argentina	1	Mexico	1
Belize	1	Slovenia	2
Brazil	10	St Lucia	1
Canada	1	St Vincent and the Grenadines	1
Chile	1	Trinidad and Tobago	1
Costa Rica	1	Uruguay	2
Grenada	1	Venezuela	1
Guatemala	1	UNESCO	1
Honduras	1	COL	2

Among the participants, 55% were female and 45% were male. Participants came from Spanish, Portuguese and English-speaking countries. Simultaneous translation services were provided in Portuguese, Spanish and English throughout the meeting to ensure that all participants had a voice, and were well understood.

Information Base

COL has published a background paper and is in the process of collecting data to prepare the *World OER Report*, which will be presented during the 2nd World OER Congress. The relevant information includes the following:

- Background Paper: Regional Consultations;
- A government survey sent by Member States of COL and UNESCO (available in <u>English</u> and <u>French</u>) which was also distributed to participants in the room to fill in manually in Portuguese, Spanish and English. The list of countries who have responded to date can be found on the <u>RCOER website</u>;
- A stakeholder survey, which COL posted online and publicized via social media;
- The Open Educational Resources in the Commonwealth 2016 survey and report;

Meeting Proceedings - Day 1 (April 3, 2017)

Opening Session: Inauguration



Welcome by Prof. Asha Kanwar, President and CEO, COL

Professor Asha Kanwar extended a very warm welcome to the participants of the fifth OER regional consultation and thanked, on behalf of COL and partners, Professor Tel Amiel, UNESCO OER Chair; University of Campinas (Unicamp); and UNESCO Brasilia officials for their support in organizing and co-hosting this gathering in Sao Paulo. Further, she thanked all the delegates for their committed and active participation in the RCOER process. Prof. Kanwar reaffirmed the objectives of the meeting by encouraging the participants to collaboratively develop a concrete set of actions from Latin America and the Caribbean. These will be added into the global report, which will act as input to the 2nd World OER Congress to be held in Slovenia, September 2017.

Transcript available as OER on the RCOER Website.

Remarks by Prof Tel Amiel, UNESCO OER Chair and co-host of the event

Professor Amiel, from University of Campinas (Unicamp) warmly welcomed all participants to São Paulo. He appreciated COL and all RCOER, and voiced a special thanks to Priscila Gonsales and Débora da Silva from Instituto Educadigital/OER Brazil for the support in organizing the event.





Address by Mrs. Margarida Salomao, Deputada Federal, Brasilia

Mrs. Salomao remarked that there is much interest in this event as a way to reinforce strategies to mainstream OER, and especially to overcome much resistance from commercial publishers of educational resources that lobby against OER and open licensing. She mentioned that a bill will be discussed this year, to openly license all publicly funded educational resources.

Remarks from Mr. Joe Hironaka, OER Programme Specialist, Communication and Information Sector (CI), UNESCO Paris

Mr. Hironaka identified OER as a multilingual asset to be modified and adapted to different context and territories, like the ones being represented by the participants. He thanked COL, partners, co-host Unicamp and the three UNESCO OER Chairs gathered. OER was coined as a concept in a UNESCO engagement and exchange meeting back in 2002, which brought together policy makers, practitioners and thought leaders, in the same format as these regional consultations. He further added that OER are in the process of being mainstreamed and can contribute addressing the challenges of the SDGs, leveraging on the rapid growth of mobile devices, increasing access and connectivity to digital space.





Remarks by Mr. Gasper Hrastelj, Deputy Secretary General, Slovenian National Commission for UNESCO

Mr. Hrastelj began by expressing his appreciation to everyone playing an active role in preparing for the 2nd World OER Congress; Professor Kanwar and the COL team; partners; and local co-host Unicamp. He was confident that Slovenia would manage the upcoming congress well, as there is political support from the Slovenian government and financial support from donors. The congress, he said, would move from commitments made in the 2012 Paris Declaration to establishing a plan of action for international collaboration in OER. He extended the country's invitation to participants to attend the 2017 congress.

Address from Mrs. Fernanda Campagnucci, representing Mr. Alexandre Schneider, Secretary of Education of the São Paulo local government

She welcomed everyone to Sao Paulo and reminded the process of passing the 2012 state bill that stated all educational resources publicly funded must be openly licensed. OER is considered to be much aligned with promoting innovation and a new education culture of sharing and knowledge building in Brazil. She added that this was especially challenging in the context of São Paulo which has a rigid normative system with more than a 1 million students and 80,000 teachers.



Technical Sessions

Overview of the Regional Consultations by Prof. Asha Kanwar, President and CEO, COL



Professor Kanwar highlighted the rich tradition of education in the region, remembering inspiring and influential thinkers such as the Brazilian Paulo Freire.

She recalled the mission of COL, laying emphasis that COL believes that learning must lead to sustainable development. Sustainable Development Goal 4 was echoed in the discourse and reported that many countries would fall way behind the 2030 target based on statistics. As such, innovative approaches are instrumental to achieve both speed and scale. Alongside, she stated that OER has a tremendous potential for increasing access and mitigating the cost of quality education. Professor Kanwar acclaimed that COL has been closely associated with openly sharing educational materials even before the creation of the term "OER" in 2002. She highlighted the availability of national or regional OER policies in Mexico, Brazil, Trinidad and Tobago; and local government OER policies such as the bill passed in São Paulo back in 2012.

She reminded that the emphasis of the 1^{st} World OER Congress in 2012 was on Governments and policies while commitment to stakeholders, strategies and concrete action is the focus for the 2^{nd} World Congress.

Prof. Kanwar presented an overview of the surveys currently in progress to provide a context for detailed deliberation. She shared the processes behind the regional consultations and the surveys, and share the data analysed as of February 5, 2017. During her presentation she also

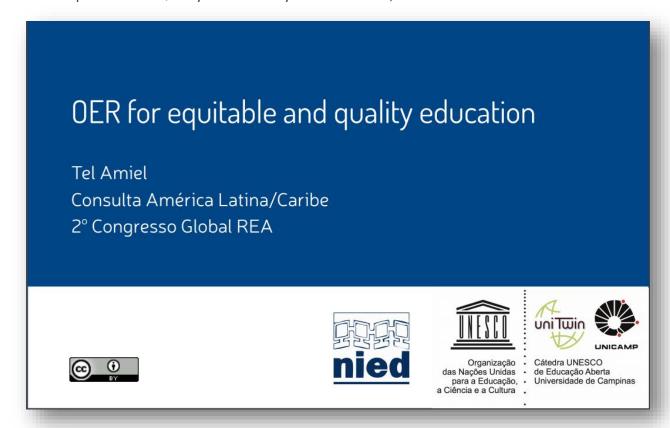
provided an overview of the discussions in the Asia; Europe; Middle East and North Africa (MENA); and Africa regional consultations.

She highlighted that this was a work-in-progress and what we see today is only the tip of the iceberg. Early findings suggest that 41 of the 70 respondents believe that there are OER policies in their countries. The majority believed that there is OER policy at the national level—29 as compared to the list of 25 national and provincial policies listed in the Creative Commons website. This was followed by institutional and then project-related OER policies. More statistical details can be found in the presentation slides and transcript.

It was also mentioned, officials believed that OER can provide more flexible learning opportunities for enhanced access. Improvement in learning outcomes and reduction in costs were seen as two other key benefits. Barriers to the use of OER included: insufficient quality content, lack of capacity, and lack of appropriate policies. Officials also believed that we needed more credible business models for convincing ministers and publishers. Language continues to be a barrier to reaching the unreached. She also added that COL had received 600 responses from stakeholders at 22nd March. The maximum responses received were from Asia and the Pacific followed by Europe and North America. 57% male and 43% female.

Prof. Kanwar indicated that COL will continue to collect data till June 15, 2107. The data will be used to prepare two documents, namely the Global OER Report and synthesis of the concrete actions recommended from all the regional consultations. Professor Kanwar emphasized that both these reports will suggest ways in which the community can contribute to promote the use of OER for inclusive and equitable quality education while collectively moving from commitment to action.

Professor Kanwar concluded with the principal remarks from the previous regional consultations and the progress which has occurred since the last World OER Congress in 2012. She also highlighted the future challenges for OER policy-making, such as evidence-based advocacy, increased capacity building, targeted interventions and strengthened collaborations.



Professor Tel Amiel stated that Latin America and the Caribbean are in the early stages of adopting OER and questioned the causes of this delayed uptake in the region. In his experience, he attributed this to lack of visibility and a lack of mobilization/articulation.

Related to visibility, there is a challenge to expose more and better OER initiatives from the region like the higher education open textbook initiative LATin, funded by the European Commission that gathered 12 countries out of which nine were from Latin America. One of LATin's studies remarks that "one of the reasons for the high costs of Textbooks is that a significant percentage are created outside the region by non-Latin American authors". The textbook is a relevant issue where national procurement schemes of textbooks and books respond to a consumption model of the publishing market. This is a paradigm anchored in printed texts produced by an industry whose purpose is to generate capital and not necessarily ensure a benefit to broader for society. Although this issue is a context of opportunity for OER, it's important that OER recognizes risks like reproducing (or even reinforcing) existing social inequalities or omitting the language factor. Other key issue is differentiating between the terms "Open", "Free/Libre" and "Free of cost" which are widely used with confusion. However, the main issue around visibility is giving value to existing initiatives which aim to support the education community to find those resources and materials that meet their needs for teaching and learning through a specialized tools.

In Brazil, two experiences are highlighted by Professor Amiel:

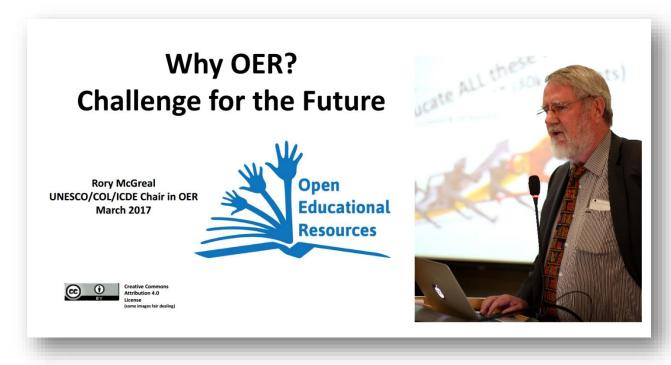
- EduCAPES is a repository of OER and courseware offered by the Open University System
 of Brazil UAB, through its Direction of Distance Education DED. EduCAPES is a portal of
 openly licensed educational objects for use by students and teachers of basic, upper and
 postgraduate education who seek to improve their knowledge.
- Ciênsação was launched with the support of UNESCO Brazil in 2015, as an initiative to promote practical experiments in public schools in Brazil. Since then, a group of volunteers have developed, tested, photographed and repeatedly reviewed more than 100 experiments (licensed with a Creative Commons BY-SA license). These experiments have been translated into Portuguese, Spanish and English and published on this site so that teachers throughout Latin America can benefit.

Regarding mobilization/articulation, the OER initiatives of the region need to be identified. An example is the OERWorldmap which tries to map OER related activities regionally and globally. In each country there is a "country champion" that implements and supports entries with information collected on people, organizations, services, projects and events related to OER. However, in the region there are only two countries (Brazil and Chile) with country champions.

Another important space for articulation is the Latin American Network of Educational Portals RELPE. It composes of educational portals (autonomous, national, public service and free) designated for this purpose by the Ministry of Education of 16 Latin American countries. The network has the intention to exchange content developed by member portals, joint production and the generation of common repositories. However, it hasn't considered openness as a way to promote their mission. In other instance, the Red Iberoamerican Network for Educational Repository Usability RIURE, whose objective is to improve the usability of Educational Repositories allowing more intuitive and simple searches, runs an OER workshop which is one of the few OER-related events in the region.

Another example of articulation is the Open Education Initiative that brings together productions and projects of the UNESCO Chair in Open Education and the Educadigital Institute, which promote the theme in Brazil. The works, involving academic research, publications, production of resources and repositories, as well as face-to-face and distance learning, have been developed by the people of the two institutions since 2007. Prof Amiel concluded by pointing to the e-mail list of this initiative as a good networking opportunity for stakeholders in the region. The slides of this session are available as OER on the RCOER website.

Why OER? Challenge for the Future by Prof. Rory McGreal, University of Athabasca and UNESCO/COL/ICDE OER Chair



Prof. McGreal started by highlighting one of the biggest challenges for the 21st century for all countries: it is estimated that by 2025 there will be 98 million new students. To meet this projection there would be a need to be four new traditional universities opened per week. He mentioned that identifying new and innovative ways of teaching and learning to meet this demand is one of the missions of the OER Chairs from different institutions (UNESCO, ICDE, COL) all over the world. To meet this challenge, the Internet is considered the biggest commons.

Prof. McGreal goes back into history to question the protective and restrictive notion of Copyright. Copyright was instituted to "encourage learning" and "promote the progress of science and the useful arts", not specifically to protect the rights of the author. He drew from many historic examples to highlight how the concept of copyright has evolved to the present day application. Then he explored OER viz. copyright.

OER, understood as "technology-enabled, open provision of educational resources for consultation, use and adaptation by a community of users for non-commercial purposes", clashes against this unbalanced notion of Copyright. Copyright challenges the granular nature of learning objects and its possible educational use for reusing, revising, remixing, redistributing and retaining. Copyright is an obstacle to assemble or "deboning" OER in courses, especially for elearning settings, with digital technical restrictions as the Digital Rights Management DRM or Digital Licenses that restricts users to copy & paste, annotate, highlight, text to speech, format change, print, move geographically, use after expiry date or, even, resell. DRM even challenges

the notion of property itself as technical restrictions involving operating systems of digital devices even restricting access to your own property (device) based on copyright.

Dr. McGreal ended by inviting the participants to visit various open initiatives like OER Knowledge Cloud; the Global OER Graduate Network for PhD student who work on OER or Open Education; and the OER University. More details on Prof. McGreal's session can be found as OER on the RCOER website.

Challenges in OER Policy Implementation in Latin America and Caribbean by Mr. Werner Westermann from Library of National Congress of Chile



Mr. Westermann presented two cases from the educational context in Chile. The first is related to a Ministry of Education ICT program for K-12 schools through the use of personalized, web-based content/assessment platforms for Math and English. The initiative that involved third-to-eighth grade students in public-funded schools costed more than USD\$ 2 million, mostly related to proprietary individual licenses of the user-subscription web service. An evaluation report of the initiative found that:

- Analytics of the platforms reported that use by students was near zero.
- Correlation between the subject and the standardized national tests was also close to zero.
- Accessibility issues rose because of licensing restrictions disrupting the possibility of personalized monitoring.

This Programme ceased operations at the beginning of the 2014 school year because of its ineffectiveness in learning and teaching process.

The second case is related to public textbook program of Ministry of Education that spends each year USD\$ 53 Million where two foreign companies dominate 80% of that share mainly due to public bids integrating Content development-Printing-Distribution. A study has shown how public and private marketplace do not encourage competition for better quality content and products.

Mr. Westermann points out that both cases present an opportunity that OER can improve the impact of the frustrated web-based platform experience and help fix a corrupted and broken public textbook market. These two cases also show that one of the challenges at the policy level is to approach today's educational challenges with specific, pragmatic, sustainable solutions at different levels guided by the OER principles and open practices.

Regarding capacity building for all education stakeholders, a major challenge is to advocate on benefits and potential, as well as risks or barriers, of Openness in educational processes. This focus on the outcomes of the educational process is part of a maturity of the process of how openness impacts education. There is a growing body "Open Educational Practices" and "Open Pedagogies" emerging through the open use of digital technology, a true reflection on how openness catalyzes innovation. Mr. Westermann provided many success and also failure stories from Chile and the region to strengthen his argument.

Research is also an important asset for OER advocacy and policy making. There is a growing body of research evidence and recommendations on the process of adoption and impact of the use of OER in educational settings. The last issue for around capacity building for all education stakeholders is the need to build a compelling and encouraging narrative of the benefits and potential of OER. A good example is the Open Washington OER Network that provides not only videos featuring grass-root, on the field, end-user practices in the use and impact of OER but also policy videos where interviews with experts in various areas of OER are woven into a series of multimedia presentations on Open Education policy strategy, implementation, and vision. More details of Mr. Westermann's presentation are available on the RCOER website.

Group Discussions



Exploring National OER Practices viz. SDG4 (Facilitated by Dr. Phylicia Marshall, COL Focal Point, Jamaica)

This session aimed to identify the current state of play in the participating countries with respect to all activities OER. Dr. Marshall framed the discussion based on the following guidelines:

- Does your country have an OER Policy? Is it National, Institutional or operating as a Project?
- What activities have your country been involved in to build capacity for OER?
- To what extent is your Government involved in the funding of OER? Is there funding from the private sector? Is OER funded through a Project?
- Who are the stakeholders in OER in your country? Do they have the necessary skills to access, use and share OER?
- What skills are required to improve OER use in your country?
- What is your country doing to develop and promote the use of OER in your country?
- Are there specific policies for different levels of the system?

All the discussions were collaboratively recorded by the participants using a Google doc in realtime. The following is a summary of the activities identified for each country:

Antigua and Barbuda

- ICT policy speaks of provision of infrastructure for OER
- Productions with government funds should be CC licensed
- Teacher training initiative. OER textbooks on entrepreneurship monitoring and evaluating e-textbook; created e-text on OER. Created space on ISKMA vet content.
- COL funding OER, training for development in OER
- Some teachers received training on OER

Belize

- Project to create OER/Notesmaster
- Workshops for managers (last week). Teachers training for Notesmaster.
- Working with COL to get funding.
- Stakeholders: teachers, students, parents, university, business, ministry of education
- Some skills but more work is required for use, development and sharing OER

Brazil

 Local Government (Municipio) of São Paulo that promote the creation of open content.

- Plano Nacional de Educação (2014-2014) menciona REA para melhoria do ensino básico. Conselho Nacional de Educação incentiva REA na Educação a Distância (Resolução CNE/CES nº 1, de 11 de março de 2016).
- CAPES is a federal program from the Ministries of Education and Science and Technology, to promote professional development for teaching in Higher Education. CAPES have the institutional mandate to load the OER and research findings in the repository eduCAPES.
- Previous projects have funded OER (Condigitais/MEC/Federal level)

Canada

- No country policy, but initiatives
- MOU among three provinces supporting OER, 15 million dollars for OER (many open textbooks; Ontario). 2 million dollars to create awareness for building OER. 20 textbooks.
- Nothing at the basic level.

Chile

• Open Data policy from CONICYT, governmental institution that supports research in higher education.

Grenada

OER Policy:

Grenada does not have a national OER Policy. However, there is a draft national ICT in Education Policy. The Ministry of Education, Human Resource Development and the Environment intends to host consultations on the draft and submit the same to Cabinet for approval in the next budgetary cycle.

- Activities Grenada have been involved in for Capacity building:
 - Training of ten (10) teachers and one (1) Curriculum Development Officer (Mathematics) in the development of OER content materials. This was done with the assistance from a COL expert.
 - Development of OER Mathematics modules for Forms 1 and 2, the development of Science modules will follow
 - Training of two tertiary lecturers in the delivery and development of online materials
 - Using the e-learning platforms for course delivery at the tertiary (Postsecondary) level

Guatemala

 Non-declarative Open Access policy for K-12, where you can only copy and distribute content and resources.

Honduras

• In the umbrella of the new Law of Education in 2012, open issues have appeared in collaboration with other countries, for example México.

Mexico

- MexicoX is federal funded MOOCs platform, which partners with higher education institutions where the courses have the requirement to be openly licensed.
- Open Access Legislation in Mexico approved by Congress in 2014, allows free access to scientific and academic works made possible by public funding
- Private institutions have played strong role, like the Technological Institute of Monterrey. The TEMOA project is a respository hub for OER, specifically mobile devices. It has formalized OER in teacher training and open guidelines for content and resource publishing. Telecommunications companies like TELMEX have supported open access initiatives.
- Toda la UNAM en Línea (http://www.unamenlinea.unam.mx/ All of UNAM online) is an open access/OER initiative running from 2012.
- Open Government Partnership has spread the word around Open, promoting initiatives REMERI (http://www.remeri.org.mx/) federated network of higher education institutional repositories, and it represents México in LAReferencia.
- Repositorio Institucional Tec de Monterrey (https://repositorio.itesm.mx/ortec/)
- REDALYC (http://www.redalyc.org) is a scientific academic journal with an open access policy.

St Lucia

- No National OER policy currently exists. A new ICT in Education Policy and Strategic
 Plan that is expected to be completed in May of 2017 will include OER Policy for the
 education system. The University of the West Indies Open Campus which has a base in
 St. Lucia, has institutional OER policy in place.
- Capacity building for OER include:
 - Use of OER training for course writers
 - Use of eLearning Platform training for tertiary educators
 - Development of OER textbook for grade 5 Mathematics
 - Development of OER TVET courses
- Government provides no funding for OER development. The Caribbean Examinations Council is aiming to work with St. Lucia to develop OER for Modern Languages for their NotesMaster platform however, no funding is proposed. A major Telecoms company Digicel has introduced their own platforms to schools to be used free of cost. The other major telecom provider FLOW also has a platform that they are hoping to introduce to school. So far, all OER projects in St. Lucia have been funded by COL. There is room however to engage more private sector partners in developing OER.
- The stakeholders include the Ministry of Education, Teachers, School Leaders, Parents, the private sector and parents. ICT Integration skills are a prerequisite for advancing skills in use, adaptation and sharing of OER. Training must be provided for teachers

and school leaders in OER development, course development and eTutoring. Parents also would benefit from training in accessing OER materials.

St Vincent and The Grenadines

- No OER policy, but ICT policy. Working with COL. Distance learning policy (NTRC) -Ministry of Education in transition.
- Using NotesMasters

Uruguay

- CEIBAL project
 - Use e learning platforms in primary and secondary education (Plan Ceibal)
 - Use e learning platforms at University (EVA plataforma de aprendizaje virtual)
 - Approved a law project in Senate (not in Deputies) open author exemptions for education
- Involvement of Government in the OER Funding:
 - No funding is received from either the Government or private sector for OER.
 However, we receive support from COL.
- Necessary skills to access, use and share OER:
 - Unequal distribution of ICT skills and so some persons will have the skills to access, while others may not necessarily have the skills.

Venezuela

No OER policy. Different state-funded universities (Universidad Central de Venezuela - saber.ucv.ve, Universidad de los Andes - www.saber.ula.ve, Simón Bolívar) have complied (non-obligatory) and use of the open source repository DSpace. They subscribe to the Latin American Repository LAReferencia (http://www.lareferencia.info).

Strategies for Mainstreaming OER (Facilitated by Mr. Joe Hironaka, UNESCO)

The session aimed to identify the enablers and inhibitors to mainstreaming OER with respect to five key aspects identified at the UNESCO OER roadmap meeting. The following is a summary of the points identified by five groups who worked on one aspect each:

1. Capacity of users to access, re-use, and share OER

- Challenge: Access. Get connectivity. Homes and cellphones.
 - Solution: Delivery off line (E.g. COL Aptus). Make sure OER are accessible through different devices. Diversity and flexibility of OER means.
- Challenge: Gap between professor and students in access to devices
 - Solution: Access to technology, learning to use computers.
- Challenge: Teachers' capacity to understand how OER can enhance their practice and their ability to use it. Understand benefits of technology; technical and pedagogical capacity.
 - Solution: OER for teacher training and development. Incentives for professors. Move as master teachers. Create avenues for professors to evolve.
- Challenge: How to document the process of using / reusing OER.
 - Solution: Better meta-analysis and data mining. Encourage best practices in creating OER, include metadata.
- Challenge: Lack of coherence in curriculums to work collaboratively. Sharing is not encouraged, assessments are individual.
 - Solution: Be examples of openness with practice. Work collaboratively. Create joint ventures with other institutions/organizations.
- Challenge: Currency of resources
 - Solution: Encourage teachers to keep their resources updated. Include a button to let users point out if mistakes are found. Give incentives to teachers that are active.
- Challenge: OER as alternative content
 - o Solution: Incorporate OER as integral element of curriculum, not as plan B.

2. Language and cultural barriers

A lot of time was spend trying to understand what the barriers to "mainstreaming" of OER would mean. One understanding of the word "barrier" would be simply that language barriers impede the adoption of content in another language. This would be remedied with machine translation, which is advancing rapidly.

A consensus that emerged during the discussions was that:

- The dominance of English-language content is a problem;
- For mainstreaming OER, a necessary condition is to find mechanisms for the creation and adoption of local language OER, as well as content appropriate to local culture.

There was no consensus about the more general view, expressed by one participant, that a cultural barrier to OER mainstreaming would be resistance of the same sort as that against "globalization" in general, the idea, maybe misguided, that the OER movement represents a

global liberal consensus imposing its will on weaker local cultures. On this view, the OER movement is urged to carefully weigh the advantages and disadvantages of policies and project that impose "global" standards in a top-down way, compared to ones that foster autonomy of and respect for the practices of local communities of students, teachers and parents.

One advantage is that when we are speaking of OER we are speaking of resources based on digital technologies, since OERs are mostly digital resources, then we can use many technologies that overcome the language barrier, such as online translation systems, for text documents, sounds and videos.

Another idea is to be able to empower the main actors and teachers so that they can develop their own resources for their audience in their own language, understanding that they could serve a larger audience in their own language.

For example, to develop OER for 590 million Spanish speakers, we could train many OER developers and creators, and not necessarily import other resources in foreign languages.

In relation to cultural barriers, there may be different strategies to overcome this barrier. One of them, the collaborative development of OER, where collaborative production allows to join efforts for the production of digital collections for multiple educational institutions located in different communities, cities or countries of the world.

3. Ensuring inclusive and equitable access to quality content

- A clear definition of inclusive and equitable education is needed based on the resources available or lack. The definition has to cast a broad net; Has to take language and culture into consideration;
- Disabilities and the required resources for education need to be taken into consideration when mainstreaming;
- Allocation of budgets for including disabled students into mainstream;
- Collaborate with bandwidth providers through Public Private Partnerships (PPP) to provide increased access;
- Access doesn't ensure equity;
- Based on the Incheon declaration, governments have to have a systematic approach to achieving SDG4 - "We recognize that the success of the 2030 education agenda requires sound policies and planning as well as efficient implementation arrangements. It is also clear that the aspirations encompassed in the proposed SDG 4 cannot be realized without a significant and well-targeted increase in financing, particularly in those countries furthest from achieving quality education for all at all levels";
- Hit and run interventions are less sustainable and has less impact;
- Increase equity starting with basic education;
- Increased teacher training;
- Provide tools to create own content;
- Quality assurance;

Create network for sharing content and build awareness regarding that networks;

4. Changing business models

- Priscilla: Publishing a book Open Education as Open Innovation (Chessbrook) as a way to insert institutions in digital culture that promotes open business models as mixed models, remixed OER accompanied by services, and donations.
- Stavros: Traditional Formal educational institutions have overshadowed Open Education
 movement: Closed, face to face, OER only for their networks. Advocate private higher
 education institutions. Calls on freemium model, a mixed model type but with
 supplementary and not additional services, especially private institutions. Private
 companies can develop curricula and then liberating the content as Social Sponsorship
 model, especially Telecom companies that can uptake the connectivity access issues in
 developing countries.
- Rory: Focus on OER and change its business in a top down approach. 90 millions on textbooks in Canada, some are old and outdated, but changing the suppliers and replace public investment in schools (end-users) by a public fund. Mandate for CC-BY, not avoiding commercial participation. There are cultural factors of resistance from the commercial publishers and also the authors from specialized institutions.
- Crowdfunding and philanthropy funding can be complementary but not the core funding, there's a lot of problems related.
- We need a very strong marketing and visibility and dissemination, we do not define business models. Differentiate the resources in search engines discoverability, looking to find. 1% Business model for big countries.

5. Development of appropriate policy solutions

Problems:

- No policy and mandate there is most likely no funding.
- Funding follows policy directive it doesn't get attention if it is not part of the directive.

Solutions:

- Create awareness, workshops, consultation with/for ministry and relevant stakeholders.
- Demonstrate how it aligns/benefits with other priorities (partnerships, commitments)
- Demonstrate savings through research. Comparative analyses of costs. Demonstrate success cases from other countries.
- Create a developmental framework for OER.
- Identify a champion to propel the project.
- Adopt a particular open license to use.
- Make sure there is, or build up expertise on OER.
- Policy should explain why we are doing and how we're going to do it.
- Attempt to show that the change is not big couch it in familiar language/experience.
- Create a verification/auditing mechanism to ensure policies are enforced.
- Commit to an evaluation framework for the effectiveness of the policy.

- Policy must be comprehensive securing open resources for anything that uses public funds.
- Policy should have a level of flexibility, dynamic
- Consider the possibility of creating a strategy instead.
- Policy should be clear and in a language that doesn't sound like trickery/more work on part of those affected something that benefits them.
- Ensure broadly impacted stakeholders are supportive before enacting.
- Guarantee continuous funding/long term support.
- Policy allows for inclusiveness.
- Infrastructure and telecomm but consider the possibility of using offline solutions and local networks (e.g. hard media, mesh etc.)

Meeting Proceedings - Day 2 (April 4, 2017)

Dr. Ishan Abeywardena started the second day of the workshop with a summary of the Day 1 activities. He reminded participants who had not yet filled in the survey questionnaire for stakeholders to do so by clicking on http://rcoer.col.org/ or by using a translated version available in Portuguese and Spanish. The purpose of the survey was to establish a global understanding of national OER development. Participants completed the surveys before the technical sessions started.

Technical Sessions

Overview of the 2nd World OER Congress, Mr. Gasper Hrastelj, Government of Slovenia.



Gašper Hrastelj, Deputy Secretary General Slovenian National Commission for UNESCO Slovenian Focal Point for the organization of the 2nd World OER Congress 2nd World OER
Congress
What's it about?

Mr. Hrastelj invited all participants to attend the 2nd World OER Congress, scheduled to be held in Ljubljana, Slovenia, from 18 to 20 September 2017.

He provided a short background summary of events leading to the organisation of the Congress and the involvement of the Government of Slovenia in the process. He informed that Slovenia has the UNESCO OER Chair on Open Technologies for OER and Open Learning since 2014, and participated in the OER Road Map Meeting organised by UNESCO in Paris in March 2016. UNESCO Executive Board through a resolution recommended to conduct a feasibility study to consider proposals for next steps regarding international collaboration on OER. Slovenia has taken the initiative to liaise with UNESCO to host the 2nd World OER Congress to mainstream OER and foster international collaboration. He informed that the Congress will have government Ministers, officials and all stakeholders in the OER landscape to chart the next course of action. The event will provide sufficient opportunity for networking and collaboration.

Mr. Hrastelj closed his presentation remarking that the Regional Consultations are key as background for the programme for the Congress. The event has not considered the development of a new declaration like in the last World OER Congress held in 2012, but will definitely look for a roadmap or action plan that can mainstream OER in different national contexts. Mr. Hrastelj's presentation is available as OER on the <u>RCOER website</u>.





Dr. Jermol reminded the participants of his different roles as UNESCO OER Chair and also as director of The Jožef Stefan Institute, the leading Slovenian scientific research institute covering a broad spectrum of basic and applied research.

Through the work related to VideoLectures.NET, an award-winning free and open access educational video lectures repository, he has been leading the efforts to embrace openness at a national level. This has been achieved through exchanging ideas, fostering knowledge sharing and by providing high quality didactic contents, not only to the scientific community but also to the general public.

This work led to the national initiative OpeningupSlovenia.net to follow and extend the European Commission's communication on Opening up Education. This sets out a European agenda for stimulating high-quality, innovative ways of learning and teaching through new technologies and open digital content.

OpeningupSlovenia is an innovative initiative in which Slovenia as a first European member state will attempt to create a unique nationwide research environment in open education. This test-bed comprises of a coalition of all Slovenian universities, compulsory and vocational education institutions with technical, research and industry partners. The objective is to explore means for

a fully-fledged open educational system in synergy and parallel with the formal one, develop innovative projects and apply for European Commission funds related to ICT and new aspects of open education.

OpeningupSlovenia is trying to uptake different challenges related to OER and the solutions to be deployed as national policies. Although there's an estimation of 880 million of openly licensed educational resources (2014) there's still very little use, i.e. massive content missing massive use. The under-used OER is caused by many scattered and isolated websites, various types of formats, different modalities, language diversity, unresolved and non-interoperable rights, different levels of quality and undescribed modes of use. There's also very little development of OER in mobiles platforms (iTunes or Google Play).

An interesting project emerging to solve these common problems is ExplorEdu which utilizes Artificial Intelligence. This model develops a "pipeline" that automatically selects and bundles open content and resources in a federated network of OER websites using JavaScript. The collection of information allows testing and improving artificial tutoring for mobile devices.

Dr. Jermol assures that OpeningupSlovenia looks to be an active open education digital leader that will develop digital capability throughout the complete educational system, redesign educational services and build common technology platforms. The ultimate goal is for Slovenia to be the 1st nationwide initiative to work in a holistic way utilizing semantic search; artificial intelligence applied to educational needs; real-time translation; and analytics to support learning problems and gaps. More details on Dr. Jermol's work can be found as OER on the RCOER website.

Group Discussion



Identifying Concrete Action for Mainstreaming OER among Various Stakeholders (Facilitated by Dr. Ishan Abeywardena, COL)

This group discussion aimed to identify the concrete actions which can be recommended to the governments of Latin America and Caribbean in terms of mainstreaming OER among the key stakeholders. The participants formed three working groups and identified solid strategies in each group. Finally each group presented and justified their recommendations to the gathering.

Based on the feedback, the concrete actions were finalized. A consolidated report on the concrete actions will be presented at the 2nd World OER Congress.

The key stakeholders which were identified are:

- Governments
- Educational Institutions
- Teachers
- Learners
- QA Agencies

- Publishers
- Civil Society
- Associations
- Librarians

Closing Remarks

Prof. Asha Kanwar, President and CEO, COL

Prof. Kanwar expressed thanks to all the participants, hosts, and partners. Besides the major discussions around OER and the 2nd World OER Congress, an important achievements of the regional consultation was to provide sensitization on OER for many of the participants. It helped some participants to become OER champions and also enabled the creation of a regional cooperation and understanding amongst participants.

Prof. Kanwar took the opportunity to include OER in the framework of SDG4, dealing with informal and formal educational environments. She explained this relationship through the three C's:

- Collaboration: the existence of numerous OER initiatives in the region, where in the
 future linguistic diversity will not be a major challenge or barrier, can empower
 networking and other collaborations engaging stakeholders and decision makers through
 a win-win situation.
- Content: OER has demonstrated its potential in cases like the emergence of open textbooks, technology infrastructure for accessibility and delivery, addressing teachers' real needs, and social empowerment accompanied by financial savings.
- Capacity: more capacity building is needed in terms of awareness of benefits, need of local champions and OER national chapters like the ones existing in Brazil, Argentina etc. for Open Access; teacher training to fulfill learning and teaching innovation, and build/promote communities of practice highlighting the work in the field.

Mr. Joe Hironaka, OER Programme Specialist, UNESCO Paris

After first expressing thanks to co-host, organizers, partners that have made possible this event, Mr. Hironaka reminds us how 20 years had passed before Sustainable Development was put in the agenda as a mainstream trend. As the SDG are the new commitment, SDG4 related to Education will be the focus of the World Congress to be held in September.

Mr. Hironaka sees two important trends in mainstream OER:

- Mobile devices and broadband have expanded with 4.7 billion mobile device users in the developing world. There is now a new demand for mobile learning modalities and suitable content.
- Growth of openly licensed resources still only has a small share of the Internet. However, it is a starting point towards mainstreaming.

Final Remarks

The representatives from the Slovenian Government also expressed their gratitude for the event and welcomed everybody to participate in the 2nd OER World Congress.

Prof. Tel Amiel expressed gratitude to COL for choosing Brazil as the venue for the regional consultation. He also thanked the participants from 18 countries who made the event a success.

At last, Dr. Ishan Abeywardena thanked all the people who worked behind the scenes to make the event a success including Ms. Patricia Schlicht of COL, the interpreters and the hotel staff. He then formally closed the Latin America and the Caribbean Regional Consultation on Open Educational Resources.

ANNEX 1 – Agenda for Latin America and Caribbean Regional Consultation on Open Educational Resources













Agenda

Latin America and Caribbean Regional Consultation on OER

Date: April 3-4, 2017

Venue: GOLDEN TULIP PAULISTA PLAZA

ALAMEDA SANTOS 85, 01419-000 SAO PAULO, BRAZIL

Theme

OER for inclusive and equitable quality education: from commitment to action.

Objectives

- 1. Review the progress of OER since the World OER Congress 2012;
- 2. Identify strategies for mainstreaming OER;
- 3. Agree on action points that can be presented at the 2nd World OER Congress;
- 4. Showcase innovative and promising practices in OER policies and initiatives in the region.

Expected Outcome

Strategies, examples and models available for mainstreaming OER in support of achieving SDG4.

This Regional Consultation will be held in the format of a workshop.

April 2, 2017

Time	Session
14:00 onwards	Arrival and hotel check-in

Day 1 - (April 3, 2017)

Time	Session
8:30 – 9:00	Workshop Registration
9:00 – 10:00	 Workshop Inauguration Welcome (Prof. Asha Kanwar, President of COL – 10 mins) Remarks from the Local Partner Institution Unicamp (Prof. Tel Amiel - 10 mins) Remarks from UNESCO (Mr. Joe Hironaka - 10 mins) Remarks from Government of Slovenia (Mr. Gašper Hrastelj - 10 mins) Remarks from Secretary of Education for the City of São Paulo, Brazil (Mr. Alexandre Schneider - 10 mins) Introducing the participants (Dr. Ishan Abeywardena, COL - 10 mins)
10:00 – 10.30	Overview of the Regional Consultations (Prof. Asha Kanwar, President of COL – 20+10 mins) - Plenary Q&A.
10:30 – 11:00	OER for equitable and quality education for all in Latin America and Caribbean (Prof. Tel Amiel, Unicamp – 20+10 mins) - Plenary Q&A.
11:00 - 11:30	Group Photo and Tea/Coffee Break
11:30 – 13:00	 Open licenses and policy Open Licenses (Prof. Rory McGreal, Athabasca University, Canada – 30+15 mins) Challenges in OER Policy Implementation in Latin America and Caribbean (Mr. Werner Westermann, Library of National Congress, Chile - 30+15 mins)
13:00 – 14:00	Lunch
14:00 – 15:30	Exploring National OER Practices viz SDG4 (Facilitator: Dr. Phylicia Marshall, COL Focal Point, Jamaica) Group work to discuss OER initiatives and best practices in different countries and reporting to the plenary.

	Group discussion for 40 minutes followed by presentation of 10 minutes each (5 groups).	
15:30 – 16:00	Tea/Coffee Break	
16:00 – 17:30	Strategies for mainstreaming OER (Facilitator: Mr. Joe Hironaka, UNESCO)	
	Break into groups to discuss key challenges to mainstreaming OER 1. Capacity of users to access, re-use, and share OER 2. Language and cultural barriers 3. Ensuring inclusive and equitable access to quality content 4. Changing business models 5. Development of appropriate policy solutions	
	Propose concrete potential solutions. Group discussion for 40 minutes followed by presentation of 10 minutes each.	

Day 2 - (April 4, 2017)

Time	Session
8:45 – 9:30	Recap of activities
9:30 – 10:40	The 2 nd World OER Congress
	 Plenary presentation by Government of Slovenia: an overview of the 2nd World OER Congress and its objectives (Mr. Gašper Hrastelj, Government of Slovenia – 20+10 mins) Demonstration of latest technologies and apps for OER (Dr. Mitja Jermol, UNESCO Chair for Open Technologies for OER – 40 mins)
	Plenary discussion on key issues to prepare inputs into the 2 nd World OER Congress.
10:40 - 11:00	Tea/Coffee Break

11:00 – 13:00	Identifying Concrete Action (Facilitator: Dr. Ishan Abeywardena, COL)	
	Working Groups: generation of Latin America's and Caribbean's inputs into the 2 nd World OER Congress.	
	Break into groups as agreed to address challenges and solutions and to prepare inputs on strategies for mainstreaming OER into planning of the 2 nd World OER Congress.	
	Prepare working group presentations.	
13:00 – 14:00	Lunch	
14:00 – 15:30	Latin America's and Caribbean's Regional Inputs into 2 nd World OER Congress (Continued)	
	(Facilitator: Dr. Ishan Abeywardena, COL)	
	Working groups present proposed Latin America's and Caribbean's inputs into 2 nd World OER Congress.	
	Plenary feedback and finalisation of Regional inputs. Forming an informal, regional network including other "Open" stakeholders.	
15:30 – 16:00	Tea/Coffee Break	
16:00 – 16:30	 Closing and Final Remarks Closing remarks (Prof. Asha Kanwar, President of COL) Remarks from UNESCO (Mr. Joe Hironaka) Remarks from Government of Slovenia (Mr. Gašper Hrastelj) Closing remarks from the Local Partner Institution Unicamp (Prof. Tel Amiel) 	

ANNEX 2 – Participant List for Latin America and Caribbean Regional Consultation on Open Educational Resources













Participant List

Latin America and Caribbean Regional Consultation on Open Educational Resources (OER) 3-4 April, 2017 | São Paulo, Brazil

Country	Affiliation
ANTIGUA AND BARBUDA	Mrs. Patricia Benn COL Focal Point Deputy Principal Antigua State College (ASC) Antigua and Barbuda
ARGENTINA	Mrs. Cecilia Sogal Content Coordinator for Educ.ar Educ.ar S.E Ministerio de Educación y Deportes República Argentina
BELIZE	Dr. Yvonne Palma COL Focal Point Education Officer Ministry of Education, Youth, Sports and Culture Belize
BRAZIL	Professor Tel Amiel UNICAMP/UNESCO Chair, Open Education University of Campinas (Unicamp) NIED/UNICAMP Brazil

BRAZIL	Mrs. Carmen Moreira de Castro Neves Director of Educational Content Ministry of Education Brasília Brazil
BRAZIL	Mrs. Marlúcia Amaral General Coordinator of Technology and Innovation of the Secretariat of Basic Education Brazil
BRAZIL	Mr. Alexandre Magalhães Martins Distance Learning Technology Coordination Section Leader Fundação Coordenação de Aperfeiçoamento de Pessoal de Nível Superior – CAPES Brazil
BRAZIL	Adauto Candido Soares Coordinator Communication and Information Unit UNESCO Brasilia Office Brazil
BRAZIL	Professor Fredric M. Litto ABED Brazilian Association of Distance Education Brazil
BRAZIL	Ms. Priscila Gonsales Executive Director Instituto Educadigital/OER Brazil Brazil
BRAZIL	Ms. Debora Sebriam Instituto Educadigital/OER Brazil
BRAZIL	Mr. Alexandre Schneider Secretaria Municipal de Educação de São Paulo Brazil
BRAZIL	Ms. Lucia Dellagnelo CIEB Brazil
BRAZIL	Ms. Ana Furniel FIOCRUZ Brazil

BRAZIL	Ms. Ana Paula Mendonça FIOCRUZ Brazil
BRAZIL	Ms. Rosane Mendes FIOCRUZ Brazil
BRAZIL	Ms. Ana Lucia Vilela Instituto Alana Brazil
BRAZIL	Mr. Antonio Lovato (sub. Ms. Anamaria Shindler) Ashoka (Latin America)
BRAZIL	Ms. Cristina Moreira Distrito Federal Brazil
BRAZIL	Drica Guzzi Escola do Futuro (USP) Brazil
BRAZIL	Irma Akamine Hiray Centro Educacional Pioneiro Brazil
BRAZIL	Marineli Meier UFPR (REA Paraná) Brazil
BRAZIL	Mr. Sergio Branco ITS Brazil
BRAZIL	Ms. Ana Valeska Gomes Assessora Legislativa (Federal) Brazil
BRAZIL	Ms. Viviane Vladimirschi Doctorate (Athabasca University) Distance Education Consultant Instructional Designer OER Researcher and Advocate Brazil
BRAZIL	Murilo Matos Mendonça UNISUL Brazil

BRAZIL	Ewout ter Haar
DIVAZIL	USP
	Brazil
	DI dZII
BRAZIL	Aureliano Vogado Rodrigues Junior
	CGU (Federal)
	Brazil
BRAZIL	Marcelo Mejlachowicz
DIVILLE	VEDUCA
	Brazil
DD 4 7 II	
BRAZIL	Vera Queiroz
	USP
	Brazil
BRAZIL	Clovis Alvarenga-Netto
	USP
	Brazil
BRAZIL	Edison Trombeta
	UNIVESP
	Brazil
BRAZIL	Nádia Rubio Pirillo
	UNIVESP
	Brazil
BRAZIL	Ana Claudia Loureiro
	UNIVESP
	Brazil
BRAZIL	Elizabete Briani
	UNIVESP
	Brazil
BRAZIL	Bruna Garabito
	UNIVESP
	Brazil
BRAZIL	Daniela Haertel
	UNIVESP
	Brazil
BRAZIL	Tiago Soares
	USP
	Brazil
BRAZIL	Daniela Costa
DIACIL	CETIC
	Brazil
	DIGEN

BRAZIL	Terezinha Marcondes Diniz Biazi IEL Brazil
BRAZIL	Margarida Salomão Federal Representative Brazil
BRAZIL	Professor Stavros Xanthopoylos Founder and CEO SPX Consultoria Empresarial Brazil
CANADA	Professor Rory McGreal UNESCO/COL/ICDE Chair in OER Centre for Distance Education Athabasca University (AU) Canada
CHILE	Mr. Werner Westermann Library of National Congress Chile
COSTA RICA	Mrs. Elena María Carreras Gutiérrez Director Innov@ Educational Programs and Coordinator, Entreneurship and Citizenship Fundación Omar Dengo Costa Rica
GRENADA	Miss Michelle Peters George Deputy Chief Education Officer-Examinations Unit Ministry of Education, Human Resource Development and the Environment Grenada
GUATEMALA	Mr. Ramiro Stuardo Herrera Echeverria Innovation and Technology Specialist Guatemala
HONDURAS	Mrs. Ana Bertha Rodríguez Hernandez Coordinator of the Department of Technology Integration Ministry of Education of Honduras Honduras
IGO - CANADA	Dr. Ishan Abeywardena Adviser, Open Educational Resources Commonwealth of Learning Canada

IGO - CANADA	Professor Asha Kanwar President & Chief Executive Officer Commonwealth of Learning Canada
IGO - FRANCE	Mr. Joe Hironaka Programme Specialist ICT in Education, Science and Culture (CI/KSD/ICT) Knowledge Societies Division Communication and Information Sector (CI) UNESCO France
JAMAICA	Dr. Phylicia Marshall COL Focal Point Assistant Chief Education Officer Tertiary Unit Ministry of Education Jamaica
MEXICO	Mrs. Marcela Morales Barragán Director Community Relations Open Education Consortium Mexico
SAINT LUCIA	Mr. Germain Anthony Curriculum Specialist for ICT Integration Ministry of Education, Innovation, Gender Relations and Sustainable Development Saint Lucia
SAINT VINCENT AND THE GRENADINES	Miss Beverly Antonio Neptune Chief Education Officer (Ag.) Ministry of Education, Ecclesiastical Affairs & National Reconciliation Saint Vincent and the Grenadines
SLOVENIA	Mr. Gašper Hrastelj Deputy Secretary-General Slovenian National Commission for UNESCO Ministry of Higher Education, Science and Technology Slovenia
SLOVENIA	Dr. Mitja Jermol UNESCO Chair in Open Technologies for Open Educational Resources and Open Learning Jožef Stefan Institute Slovenia

TRINIDAD AND TOBAGO	Ms. Saleema Hyatali Head, Teaching and Teacher Development Division Ministry of Education Trinidad and Tobago
URUGUAY	Senator Constanza Beatriz Moreira Viñas Senator of the Republic of Uruguay Parliament of Uruguay Uruguay
VENEZUELA	Professor Antonio Silva Sprock Information Systema Research Center Computación Scholl, Science Faculty Universidad Central de Venezuela Venezuela