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Guidelines on the implementation of the OER Recommendation

Action Area 5: Promoting and reinforcing international cooperation

OER 

Published in 2024 by the United Nations Educational, Scientific and Cultural Organization,
7, place de Fontenoy, 75352 Paris 07 SP, France

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CI/2023/PI/101



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These guides have been prepared by UNESCO, as part of its programme of support to governments and educational institutions in implementation of the UNESCO OER Recommendation. They draw heavily on in-depth background papers prepared by OER experts from around the world in each of the five Action Areas: Prof. Melinda dP. Bandalaria (building the capacity of stakeholders to create, access, re-use, adapt and redistribute OER); Dr Javiera Atenas (developing supportive policy); Dr Ahmed Tlili (encouraging inclusive and equitable quality OER); Dr Tel Amiel (nurturing the creation of sustainability models for OER), and Ms Lisbeth Levey (facilitating international cooperation). We are deeply grateful for their assistance and expert knowledge. Preparation of the text of the final guides was done with support from Neil Butcher and Alison Zimmermann of OER Africa. The tables of possible actions for governments and institutions are adapted from an OER Recommendation Actions Matrix, which outlines practical activities that governments and educational institutions can consider operationalizing under the five action areas of the Recommendation. The Matrix was first developed in November 2019, using inputs from members of the Network of Open Orgs (NOO).¹

¹ The NOO is coordinated by Open Education Global (OEG) and aims to support the implementation of the UNESCO OER Recommendation. Its membership includes OEG, Community College Consortium for Open Education Global, OER Africa, Open Education Policy Hub-Lab, Creative Commons, Institute for the Study of Knowledge Management in Education, European Network for Catalysing Open Resources in Education (ENCORE+), International Council for Open and Distance Education (ICDE), ICDE OER Advocacy Committee, Scholarly Publishing and Academic Resources Coalition (SPARC), SPARC Europe, European Institute for Learning, Innovation and Cooperation and the International Community for Open Research and Education, Centrum Cyfrowe, Wikimedia Foundation, Multimedia Educational Resource for Learning and Online Teaching (MERLOT)-SkillsCommons, together with representatives from higher education institutions (including University of Barcelona, University of Bonn, and Politecnico di Milano-METID, amongst others) and inter-governmental organizations such as the Commonwealth of Learning and UNESCO.





1. Introduction

The Universal Declaration of Human Rights (UDHR) states that all people have inalienable rights and fundamental freedoms that include the right to receive and impart information and ideas through any media, regardless of frontiers (Article 19) and the right to education (Article 26).² UNESCO has a constitutional commitment to ‘the free exchange of ideas and knowledge’ and supports sharing of knowledge using technologies. Digital skills and competencies are increasingly important to enable citizens to participate actively in digital transformation that supports sustainable development, to benefit from lifelong learning and employability opportunities, and to respond to global challenges. It is also important for the global community to anticipate future crises that may impact teaching and learning. This is necessary to lay the foundation for the systematic and sustainable integration of good practices for knowledge sharing and learning support in light of lessons learnt during the COVID-19 pandemic. It is thus essential that the global community acts to enable universal access to information and knowledge.

In this global context, Open Educational Resources (OER) can be a vehicle for realizing Articles 19 and 26 of the UDHR and for catalysing quality education in a digitized world. OER are defined as ‘learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open licence, that permit no-cost access, re-use, re-purpose, adaptation and redistribution by others.’ An open licence is one that respects the intellectual property rights of the copyright owner, while granting the public the rights to access, re-use, re-purpose, adapt, and redistribute educational materials.³

² Universal Declaration of Human Rights. <https://www.ohchr.org/en/human-rights/universal-declaration/translations/english>

³ Recommendation on Open Educational Resources (OER). UNESCO. <https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer>

OER development provides opportunities to enhance the experience of learners and educators, as well as benefit educational communities and broader society by providing access to educational resources and teaching methodologies that can be adapted according to the needs of each context, either cultural or situational. However, operationalizing OER creation, adaptation and use poses a range of challenges to educational decision-makers and stakeholders. UNESCO developed the 2019 Recommendation on Open Educational Resources (referred to as ‘the OER Recommendation’ for brevity in some parts of this document) to respond to the need to drive OER adoption. The Recommendation was adopted by consensus of all 193 Member States at the 40th Session of the UNESCO General Conference, following a two-year consultative process. It is the first UNESCO normative instrument for technologies and education and requires Member States to monitor and report on its implementation every four years.

1.1 The aim of the OER Recommendation

The OER Recommendation aims to assist Member States at the national level by supporting the development and sharing of openly licensed learning and teaching materials, benefiting students, teachers and researchers worldwide. It supports the creation, use and adaptation of inclusive and quality OER, and facilitates international cooperation in this field through five Action Areas, namely: (i) building the capacity of stakeholders to create, access, re-use, adapt and redistribute OER; (ii) developing supportive policy; (iii) encouraging inclusive and equitable quality OER; (iv) nurturing the creation of sustainability models for OER, and (v) facilitating international cooperation. In addition, it contributes to the building of open and inclusive knowledge societies, and to the achievement of the 2030 Agenda for Sustainable Development, namely SDG 4 (Quality education), SDG 5 (Gender equality), SDG 9 (Industry, innovation and infrastructure), SDG 10 (Reduced inequalities within and among countries), SDG 16 (Peace, justice and strong institutions) and SDG 17 (Partnerships for the goals). Operationalizing the Recommendation remains a challenge for governments and institutions, as it requires a range of policies, capacity-building and strategies to fully realize its potential in facilitating the achievement of these SDGs.

1.2 Objective of these Guidelines

In essence, governments and institutions are concerned with key skill areas for OER implementation: (1) project management skills for OER content acquisition (that is, finding, adapting and creating materials, with clear and rigorous policies and strategies for procurement); (2) applying quality management criteria to be confident that the quality of OER is high, relevant and suitable to context; and (3) ensuring that users (such as teachers/educators, learners and community development initiatives) have the capacity to find and use resources that are located online. These key issues can be tackled when policy and decision makers

unpack the Recommendation and put into process concrete actions. The overall objective of these Guidelines is to support governments and institutions in their implementation of the Recommendation, by providing concrete recommended actions for Action Area 5: promoting and reinforcing international cooperation on OER, which will enable governments and institutions to overcome these three key challenges.

The targeted stakeholders for these Guidelines are those responsible for learning, which includes ministries responsible for education (K-12 and tertiary), information and communication technology (ICT), human resources development, and youth. Institutions include those that provide education in the formal and informal sectors, in urban and rural contexts. Specific stakeholders impacted by strategies to implement include teachers, educators, learners, governmental bodies, parents, educational providers and (ICT) infrastructure providers, researchers, research institutions, civil society organizations (including institutions, education support personnel, teacher trainers, educational policy makers, cultural institutions (such as libraries, archives and museums) and their users, ICT professional and student associations), publishers, the public and private sectors, intergovernmental organizations, copyright holders and authors, media and broadcasting groups and funding bodies. The range is extensive; thus, it is critical to identify practical ways in which they can act to promote and use OER.

These Guidelines address Action Area 5 of the Recommendation: promoting and reinforcing international cooperation on OER: a description/overview of the recommendations; an introduction to the specificities addressed in the implementation of Action Area 5; a matrix of actions recommended for governments and institutions to implement each point of Action Area 5; a discussion on the specificities related to Action Area 5; and examples of good practice (from different regions and contexts) in implementation of Action Area 5.

The Guidelines offer advice on how to operationalize Action Area 5 of the Recommendation. They are not prescriptive, but aim to offer suggestions for activities, as well as background on the specificities for the Action Area. Users are encouraged to contextualize the elements of these Guidelines as appropriate for their specific national and institutional contexts.



2. Description of Action Area 5

Action Area 5 of the OER Recommendation focuses on promoting and reinforcing international cooperation, in particular the actions listed below in section v of the Recommendation:⁴

- **Promoting and stimulating cross-border collaboration and alliances on OER projects and programmes**, by leveraging existing collaborative networks.
- Establishing **regional and international funding mechanisms to promote and strengthen OER** and identify partnerships and mechanisms to support international, regional, and national efforts.
- Support and maintain **peer networks to share OER in different subject matters, languages, institutions, and levels of education**.
- Incorporating (where such exist) **clauses that relate to OER in international agreements**.
- Exploring the **development of an international framework for copyright exceptions and limitations for education and research purposes** to facilitate international cooperation on OER.
- Supporting the contribution of intercultural communication skills, the management of multicultural groups, the design of communities of practice and community adjustment strategies in the local implementation of OER to promote universal values.

OER should be of critical importance to governments, international agencies, and donors alike. Governments have a direct responsibility to the people that they govern and can act to enable the development of OER by joining or facilitating international coalitions where good practices can be shared. OER can be a powerful force for opening education and achieving equity and high-quality educational outcomes for all. Governments and other international agencies can work together to develop policies, agreements and frameworks for the development and use of OER. Funding is a potential barrier to development, but the development and use of high-quality openly licensed material will both ultimately save money (closely linked to sustainability as outlined in Action Area 5 of the Recommendation) and help to improve educational outcomes.

Governments should take the lead in negotiations with international development agencies and each other pertaining to how content is developed, used, and made available for use by their citizens. Moreover, international cooperation on OER will assist governments in taking leadership roles by making it feasible to develop resources that are pertinent across countries and regions.

⁴ <https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer>



3. Implementing Action Area 5

It is important that partnerships are defined clearly and provide a level playing field, including control over educational content at the conclusion of projects. Educational resources created through international cooperation must also be stored in perpetuity (in functional and qualitative repositories) and made available in file formats that will permit governments and other stakeholders to produce large-scale print runs in the future. Table 1 below provides strategies for governments and institutions to employ in meeting Action Area 5.

Table 1 Suggested Action Area 5 activities for governments and institutions

Governments	Institutions
<p>Action: (a) promoting and stimulating cross-border collaboration and alliances on OER projects and programmes, leveraging existing transnational, regional and global collaboration mechanisms and organizations. This should include joining efforts on collaborative development and use of OER as well as capacity building, repositories, communities of practice, joint research on OER and solidarity between all countries regardless of their state of OER development.</p>	
<ul style="list-style-type: none"> • Participate actively in relevant regional and international networks and alliances on OER such as the UNESCO OER Dynamic Coalition • Consider government-to government partnerships to implement as a strategy to share costs and increase cost-effectiveness of investments 	<ul style="list-style-type: none"> • Participate actively in relevant regional and international networks and alliances on OER and open access, starting with collaborative initiatives managed by UNESCO • Consider inter-institutional partnerships (both within and beyond a country) to implement some of the initiatives outlined above as a strategy to share costs and increase cost-effectiveness of investments

Governments	Institutions
Action: (b) establishing regional and international funding mechanisms for promoting and strengthening OER and identifying those mechanisms, including partnerships, that can support international, regional and national efforts.	
<ul style="list-style-type: none"> Explore the possibility of establishing joint funding mechanisms with other governments and intergovernmental organizations to support initiatives developed collaboratively 	<ul style="list-style-type: none"> Explore joint funding between institutions on the development and sharing of OERs in fields where little/no localized training exist
Action: (c) supporting the creation and maintenance of effective peer networks that share DER, based on areas such as subject matter, language, institutions, regions and level of education at local, regional and global levels.	
<ul style="list-style-type: none"> Identify suitable peer networks in which educational stakeholders can participate and publicize information on cooperation within the country 	<ul style="list-style-type: none"> Identify suitable peer networks in which educational stakeholders can participate and publicize details within the institution, using communications mechanisms outlined in (i) above
Action: (d) incorporating, where appropriate, specific clauses relating to OER in international agreements concerned with cooperation in the fields of education.	
<ul style="list-style-type: none"> Encourage incorporation of suitable clauses during negotiation of relevant international agreements 	<ul style="list-style-type: none"> Encourage incorporation of suitable clauses during negotiation of relevant international agreements
Action: (e) exploring the development of an international framework for copyright exceptions and limitations for education and research purposes to facilitate cross-border exchange and cooperation on OER.	
<ul style="list-style-type: none"> Participate in any discussions exploring the development of international frameworks 	<ul style="list-style-type: none"> Not Applicable
Action: (f) supporting the contribution of intercultural communication skills, the management of multicultural groups, the design of communities of practice and community adjustment strategies in the local implementation of DER to promote universal values.	
<ul style="list-style-type: none"> Join international coalitions mandated to collaborate on intercultural communication and dialogue (for example, the UNESCO e-Platform on Intercultural Dialogue) 	<ul style="list-style-type: none"> Access and join national and international networks mandated to collaborate on intercultural dialogue and share experiences Establish local networks with other institutions, to foster intercultural dialogue

3.1 Types of international collaboration and open access repositories

Modes of international cooperation

Governments can enter different types of partnerships for collaboration. One mode is through coalition - governments can form alliances to achieve a common purpose. Perhaps the most significant form of international collaboration is UNESCO's OER Dynamic Coalition (see the 'Examples of good practice' section of this document).

Other modes of international cooperation and funding include:

- **Donor contracts and grants to non-governmental agencies (NGOs):** In many instances, development organizations, such as the United States Agency for International Development (USAID), UK Aid, UNESCO, and the Global Partnership in Education (GPE) will contract with an NGO to conduct an early literacy project. These NGOs are often based in the country from which the development aid is provided. The project may work with local governments and agencies, but it is not always clear who owns the intellectual property at the end of the project and where it will be stored for future use.
- **Development Banks and governments.** The World Bank Group is the largest non-government financier of education in the developing world and works on education in 90 countries.⁵ It also collaborates with and funds the GPE. World Bank programme staff negotiate directly with governments to provide loan financing to government projects that are implemented through government structures and procurement processes, but also contract with consultants and NGOs to implement projects.
- **Collaboration between governments and intergovernmental organizations (IGOs).** There are numerous IGOs in which governments participate. These include UNESCO, the World Health Organization (WHO), the Pan-American Health Organization (PAHO), the Commonwealth of Learning (COL), the Southeast Asian Ministers of Education Organization (SEAMO), the Southern African Development Community (SADC), to name a few examples. Governments are already equal partners in these IGOs. They can advocate and plan for OER within their participatory frameworks. For example, Member States of the East African Community (EAC) are hoping to harmonize their curricula and standards.⁶ This would be an excellent opportunity to ensure that curricula materials are openly licensed.
- **International networks and associations.** Some networks and associations do not typically involve governments, but they are important to the Recommendation, development of OER content, and use of OERs.

⁵ <https://www.worldbank.org/en/topic/education/overview>

⁶ <https://www.eac.int/press-releases/138-education.-science-technology-news/1545-eac-partner-states-working-to-harmonise-education-systems-and-curricula-in-the-region>

- **International cooperation among academics.** Scientists play a major role in advocating for open knowledge production and utilization, such as OER, Open Science, and Open Data. These activities are often carried out through international networks and associations. Governments sometimes collaborate and fund these activities. Governments and institutions can explore the possibility of joining a platform such as the Scientific Electronic Library Online (SciELO), discussed further in the 'Examples of good practice' section of this document.

Open access repositories

International cooperation can be leveraged effectively to establish and maintain OER repositories. The terms of licensing and responsibility must be clearly defined by members, with robust evaluation and monitoring of content and quality. Universities and research institutions in many African countries, for example, maintain Open Access repositories for the scholarship completed by staff and students (see the example of the IAI in the 'Examples of good practice' section of this document). Although few institutional repositories of academic literature directly engage with government, they are significant because they signpost the development of openly licensed content.



4. Examples of good practice

UNESCO OER Dynamic Coalition:⁷ Established in 2020, the OER Dynamic Coalition aims to foster and facilitate international cooperation between stakeholders and share best practices with a view to creating synergies and networks in the implementation of the 2019 Recommendation on OER. It brings together stakeholders from Member States, including from Ministries responsible for Education and/or Communication and Information Technologies, National Commissions to UNESCO, educational institutions and bodies, cultural institutions (including libraries, archives and museums), Intergovernmental Organizations (IGOs), UNESCO Category 2 Centres, specialized institutions, civil society and the private sector. The OER Dynamic Coalition has held several training webinars and other events. Information is available on the UNESCO OER Dynamic Coalition website.

The Asia Pacific Network for Global Change Research (APN-GCR)⁸ is an intergovernmental network of 22 countries working in the Asia-Pacific region to address the challenges of global change and sustainability. Its mission is to support a cohesive and interactive community of global change researchers, policymakers, practitioners, and civil society across the Asia-Pacific region through innovative and transdisciplinary approaches that draw upon the extensive network of science-policy practitioners. An integral part of its mission is to support and promote scientific research. Its publications, which have been uploaded to the website carry a CC BY-NC licence. This kind of regional activity focused on a topic of relevance, like global change, would be pertinent in other regions of the world. The APN-GCR is an example of international cooperation between an IGO, governments, and scientists.

⁷ [https://www.unesco.org/en/open-educational-resources/oer-dynamic-coalition?TSPD 101 R0=080713870fab200084a 753bc44bdd3fa 2d9735a 2c31745b0d4ce9d497150fcab67a6ae30823266 7608f4](https://www.unesco.org/en/open-educational-resources/oer-dynamic-coalition?TSPD%20101R0=080713870fab200084a%20753bc44bdd3fa%202d9735a%202c31745b0d4ce9d497150fcab67a6ae30823266%207608f4)
⁸ <https://www.apn-gcr.org/>

Pan American Health Organization (PAHO) and its regional bureaus is well known. PAHO,⁹ which is an arm of WHO and is the specialized international agency for the Americas, maintains a health sciences platform with OER content. PAHO sets regional health priorities and mobilizes action to address health problems that respect no borders and that, in many cases, jeopardize the sustainability of health systems. Dissemination of research information and training resources are among its briefs.

In 2012, PAHO established an OER Network in cooperation with BIREME¹⁰ (Latin America's centre for health information), The network is an integral part of the Virtual Campus of Public Health (VCPH)¹¹ and the Virtual Health Library (VHL).¹² Its purpose is the creation of a Network of Open Educational Resources to enable the production, publication, search, and use of OER learning objects in the region of the Americas. BIREME, VCPH, and VHL partner with governments and academic institutions. The pages are in English, French, Portuguese, and Spanish.

The VCPH uses a CC BY-NC 3.0 licence, although the 'terms and conditions' page states that other CC licenses may also be used and there may be some third-party content, which is not openly licensed. Open licenses are also used for the educational content on the other pages. PAHO's OER Network is an example of governments using an existing regional framework to establish an OER repository in an important area for the developing world. This is the only repository of its kind. Neither WHO nor its branches in different regions of the world have established such a repository.

Scientific Electronic Library Online (SciELO):¹³ This is an international network with participation and funding from universities and governments in Latin America, the Caribbean, the Iberian Peninsula, and South Africa. It is a model of collaboration between the scientific community and government agencies responsible for science. SciELO is an important resource because it is one of the few platforms to make available and discoverable open access journal content from the global South.

International African Institute (IAI):¹⁴ Hosted by the SOAS University of London, this repository aims to promote the scholarly study of Africa's history, societies and cultures. It publishes several journals, including the Journal of African Cultural Studies and the International African Library series, as well as hosting African digital research repositories. It serves users in English, French and Portuguese. Although not all of the published material is open, the 'African countries initiative' provides electronic access free to libraries and non-profit research and educational institutions in Africa.

9 <https://www.paho.org/en>

10 <https://www.paho.org/en/bireme/about-latin-american-and-caribbean-center-health-sciences-information>

11 <https://www.campusvirtualsp.org/en>

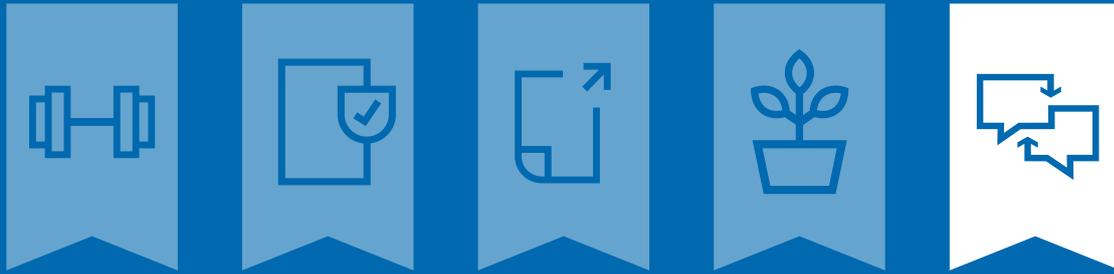
12 <https://www.paho.org/en/documents/data-base-virtua1-health-library>

13 <https://www.scielo.org/>

14 <https://www.internationalafricaninstitute.org/>

UNESCO e-Platform on Intercultural Dialogue:¹⁵ The Platform is aimed at audiences who want to learn from shared knowledge and experiences, or simply connect with one another to collaborate and exchange ideas. The platform's international reach supports strong, diverse networks and showcases global achievements with Intercultural Dialogue through the good practices.

¹⁵ <https://www.unesco.org/interculturaldialogue/en>



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UNESCO OER page at:

<https://www.unesco.org/en/open-educational-resources>

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