EDI GUIDELINES

GO-GN EDI Guidelines

Equity Diversity and Inclusion in Open Education with a focus on Africa and Latin America

v.1.1

30 June 2023

GO-GN is a network of PhD candidates around the world whose research projects include a focus on open education. These doctoral researchers are at the core of the network; around them, over two hundred experts, supervisors, mentors and interested parties connect to form a community of practice that:

- Raises the profile of research into open education
- Offers support for those conducting PhD research in this area
- Develops openness as a process of research

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Contents

Foreword

The Global OER Graduate Network (GO-GN) is now in its 10th year. It has created a vibrant, supportive global community of Doctoral researchers in the field of open education. However, like many OERs themselves, the research field tends to be dominated by the Global North. GO-GN has sought to recruit members from all regions, but despite our efforts we still felt the Global South was under-represented in our network. Given how much our members value the network and tell us how it has played such an important part in developing their careers as researchers, this felt like a missed opportunity to reach people who might greatly benefit from membership.

The Equity, Diversity, and Inclusion (EDI) funding from the Hewlett Foundation has allowed us to explicitly address this aspect, through two separate projects. Both of these projects have worked with researchers in their respective regions, gaining insight and input from a wide range of contributors. These Guidelines bring together this work, and most importantly synthesise the findings and recommendations.

Promoting EDI in a global network, and with limited funds is not just a case of having good intentions, but rather of finding practical ways to help improve inclusion. It also means sometimes asking difficult questions of ourselves. These Guidelines provide a practical and well-reasoned approach. We are adopting these now into the GO-GN project, but I think their value goes beyond just our project and are applicable to any community or endeavour that seeks to have a broad participation and equity in its approach.

I hope you find the Guidelines interesting, and more importantly, useful.

Martin Weller

Director, GO-GN

Introduction

Equity, Diversity, and Inclusion (EDI) has been part of the Global OER Graduate Network's (GO-GN) agenda since its foundation in 2013, but it was in 2018 when its first project directly related to EDI was developed. As the network matured, it became apparent that despite all efforts from the network, the majority of its participants come from Global North/developed countries. GO-GN currently supports 145 PhD candidates registered at universities in 27 countries; however of these, only 33 conduct their research in the Global South: Argentina (1), Brazil (1), China (1), Fiji (1), India (8), Kenya (1), Malaysia (1), Mauritius (1), Mexico (2), Nigeria (2), Rwanda (1), South Africa (8), Sri Lanka (2), Turkey (2) and Uruguay (1) (Weller et al., 2022). The concern is that, even with all our efforts to be open and diverse, the Global South is still under-represented, and GO-GN is not reaching those who could potentially benefit the most from being part of the network (Rodés & Iniesto, 2021). This report examines GO-GN's EDI focused activities from 2018-2022 and reflects on GO-GN current practices, reflecting and learning together on what could and needs to be done differently, and how. Moreover, by identifying how open research communities such as GO-GN can be more diverse, equitable and inclusive can also potentially benefit other initiatives and organisations facing similar challenges.

The GO-GN EDI project has had two phases to date. The first phase (2018-19) focused on EDI practices in open education (OE) in Africa. It was led by Carina Bossu and Judith Pete. Judith is a GO-GN alumna from Nairobi, Kenya. Nine interviews with key OE experts and practitioners from Africa were conducted. This phase also included a two-day face-to-face workshop in Nairobi, and several dissemination events. Katy Jordan, GO-GN alumna from the UK, has participated in the analysis of interviews and workshops data of this phase. Findings from phase 1 informed the initial GO-GN recommendations for EDI and also provided the foundation for phase 2 of the EDI project.

Phase 2 of the project started in early 2020 and was led by Carina Bossu and Viviane Vladimirschi. Viviane is also a GO-GN alumna from Sao Paulo, Brazil. Phase 2 aimed at investigating EDI in OE in Latin America. Although the initial plan for Phase 2 was to mirror the project design elements of Phase 1, this was not possible due to the impact of the Covid-19 global pandemic on researchers, participants and worldwide. Notwithstanding, 12 online interviews with key OE experts across Latin America were conducted, including participants from Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, and Uruguay. Instead of a face-to-face workshop, the team conducted an online workshop with key project participants who had been previously interviewed.

Both phases were widely disseminated through conference presentations, webinars, and blog posts; phase 2 blog posts were translated into Portuguese and Spanish. In 2022, the team developed the GO-GN Collega mentoring programme, as an attempt to implement some of phase 2 recommendations. This implementation phase was led by Carina Bossu and

Francisco (Paco) Iniesto. Recommendations included the development of effective communities of practice around OE in Latin America to enable broader dissemination of participants' open practices and research to Global North and beyond. This aimed to support Latin American scholars in OE to produce high-quality pieces of research in English. However, due to low responses and interest, the Collega programme was discontinued. Instead, the objective of the implementation phase was reoriented to the production of this handbook, which contains a set of GO-GN EDI guidelines in OE based on the experiences of phases 1 and 2 and informed by the relevant literature in the field. In the next section, we provide some definitions for Equity, diversity, and inclusion in the context of open education.

Definitions

Equity, diversity, and inclusion are different terms but often overlap, and can be mutually constitutive. In the broader context of open education, EDI are almost taken-for-granted, and specifically in the context of open initiatives, projects, and practices. However, this is not always the case. A study by Lambert (2018) revealed that references to concepts specifically related to social justice, and more broadly equity, diversity, and inclusion in a selection of publications about openness were scarce. In order to better understand EDI in OE and some of its specific challenges, we will start by defining these concepts. We also started all the interviews conducted in this project by asking participants their view on the definitions of EDI within their context, which will be presented later in this document.

Equity
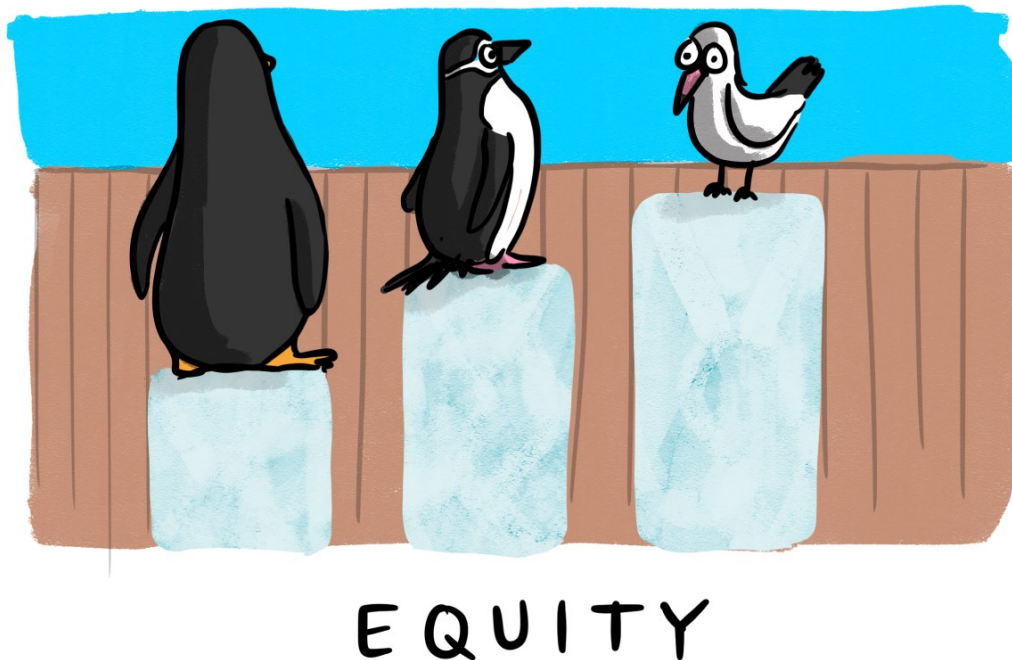
EQUITY

It is key that we critically engage with the differences between equity and equality as the two concepts are generally confused with one another.

- Equality generally means treating people the same way, to give everyone equal access to opportunities and benefits in society.
- Equity includes treating some people differently, to take into consideration some people's particular needs and situations (Ontario Human Rights Commission, n.d.)

Fundamental to equity is the reality of intergenerational and structural inequalities based on any one or a combination of characteristics such as race, gender, socioeconomic background, culture, and language. Equity in the context of OER, should consider that 'free' or 'open' does not necessarily eliminate structures of oppression such as systemic racism, sexism, homophobia, ableism, and more (Williams & Anastasi, 2018).
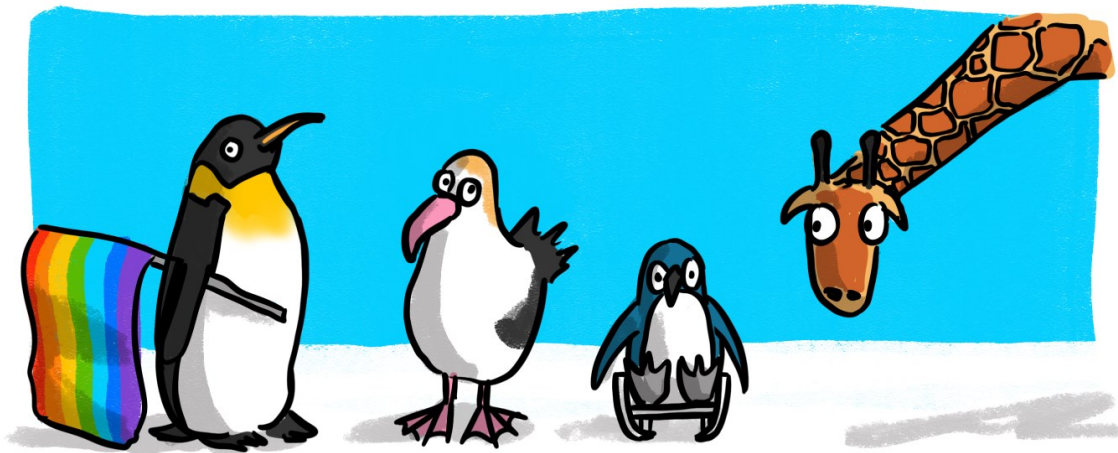
Diversity

More often than not, diversity in the context of OER refers to the diversity of licensing and materials than to diversity in the OER community or diversity as a focus of the OER community (e.g., Bossu, Brown & Bull, 2011; Olcott Jr, 2012). In addition, Gaskell (2019) refers to diversity as a value such as 'openness', and Yuchi and Zhujun (2019), speak of OER as a means to address the diverse needs of educators and learners. OER also has the potential to address a greater diversity of learner needs, such as students with accessibility needs (Navarrete, Peñafiel, Tenemaza & Luján-Mora, 2019).

Thomas (2019) offers a different angle of diversity in OE and includes elements such as accessibility, language, culture and post-colonialism, economic disenfranchisement and divides as well as "barred from access." As such, diversity is much more than a value but an intentional commitment to embrace differences whether in language, geopolitical location, gender, educational context, and culture.

Inclusion
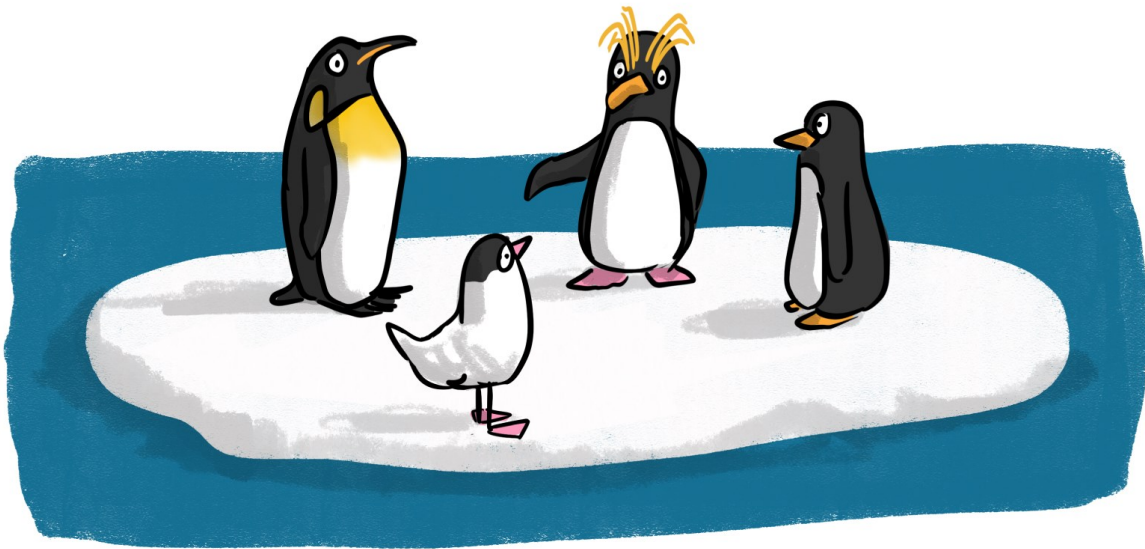
INCLUSION

Inclusion, like the notion of diversity, can mean varying things to different individuals and stakeholders. Inclusion should be much more than just respect for difference and diversity. Instead, it is best seen as a critical disposition allowing dominant narratives that promote exclusion and discrimination based on gender, race, culture or language, for example, to be questioned and disrupted. It is also important to consider the power imbalances that often exist between those who make decisions about who are included and excluded (McLaren, 2018). Meanwhile, any attempt to synthesise the range of key elements that make-up diversity and inclusion, without a critical analysis to underpin, would not harness the full potential of inclusion in OE.

Justice, Equity, Diversity and Inclusion (JEDI)

As discussed above, the concepts and definitions between equity, diversity and inclusion overlap and sometimes cannot be separated. The same can be said for social justice. For some scholars, the social justice discourse includes, overlaps and intersects with EDI (Bali, Cronin & Jhangiani, 2020). For others, it is important to specifically incorporate "justice" into EDI, therefore the acronym JEDI was created (Martinez & Truong, 2021). For Martinez and Truong (2021), EDI espouses that we value equity, diversity and inclusion, while JEDI can connect these values to accountability for ensuring that goals are met.

However, critics believe that, despite the fact that justice is an important element to include and consider, the acronym JEDI inherits a notable set of meanings; it shares a name with the super heroic protagonists of the science fiction Star Wars franchise, the "Jedi", and this could distract us from of the serious issues that justice and EDI represent. In addition,

considering that not everyone is a Star Wars fan, and that Jedi is an exclusive group of mostly male protagonists with special powers, the JEDI acronym could work against EDI principles and causes (Hammond et.al, 2021).
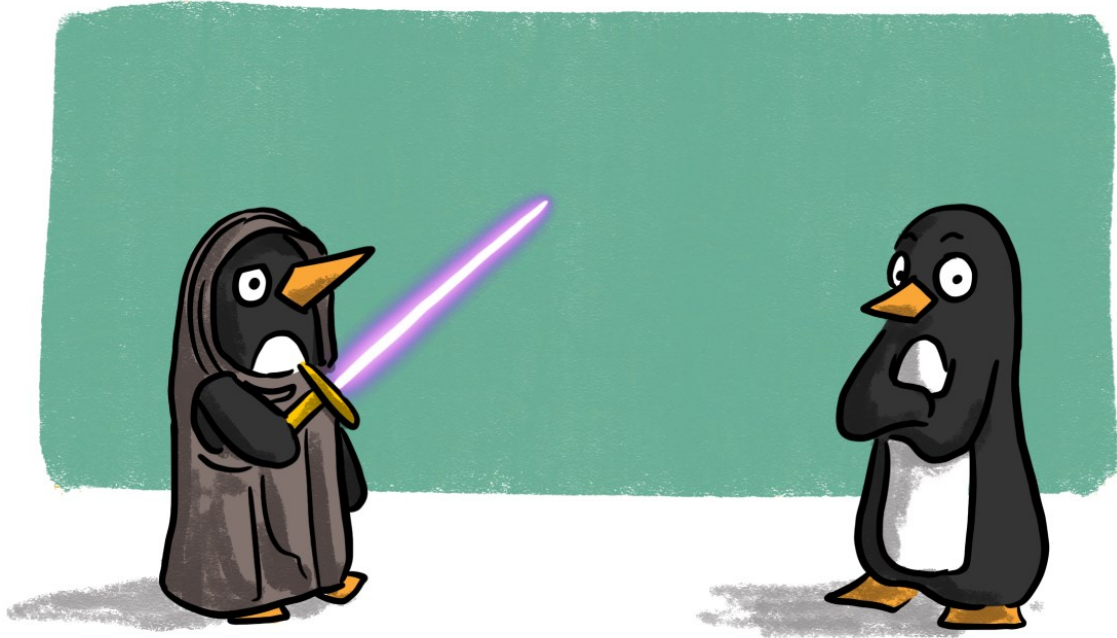
Inclusion, Diversity, Equity and Accessibility (IDEA)

Another acronym that has recently emerged is Inclusion, Diversity, Equity and Accessibility (IDEA), which makes learners' accessibility more prominent. Accessibility is the practice of making information, activities, and/or environments sensible, meaningful, and usable for as many people as possible (SeeWriteHear, 2022). Accessibility is also about equity, inclusive cultural practices, people, compliance, usability, and context (SeeWriteHear, 2022). Although accessibility is an important part of EDI, and a key element for OE to succeed and reach its potential, for the purpose of this report it will be included in the overall definition of EDI used here.
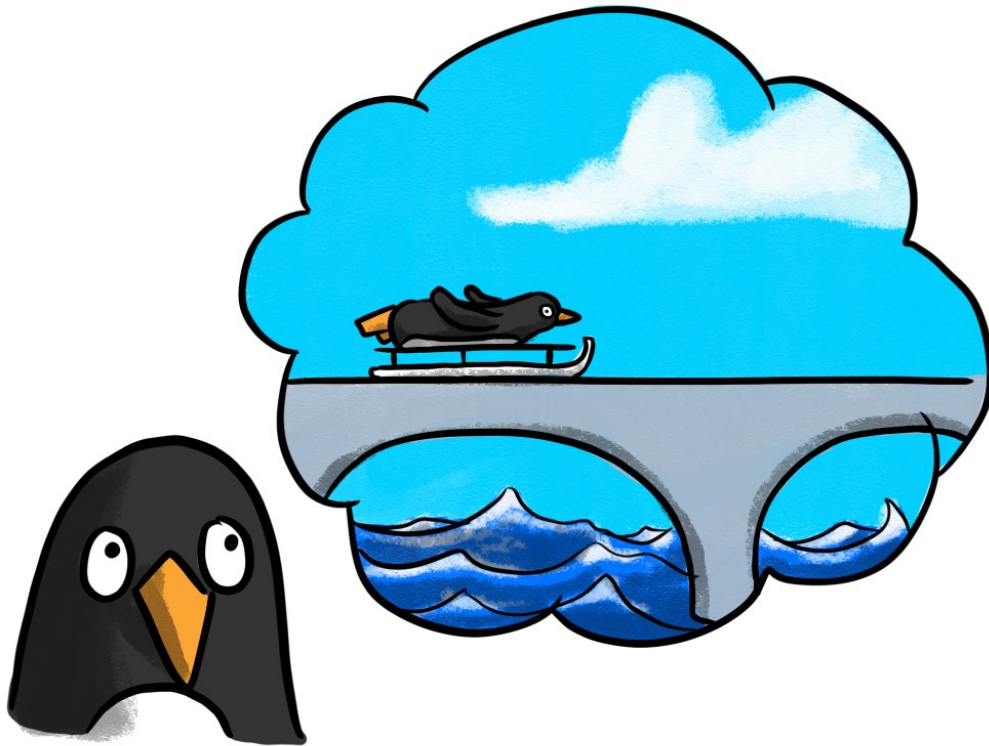
Next section explores the past and current OE research in Africa and Latin America including OEPs and OERs and considering EDI.

OE initiatives in Africa and Latin America

Similar to most regions of the world, OE initiatives in Africa and Latin America are plenty and varied. They have formally and informally supported many learners, provided professional development to educators and other professionals, and helped educational institutions to improve their offerings. In this section we provide an overview of some initiatives in these two regions. This overview is by no means exhaustive, but it will hopefully give readers some understanding of OE in these two vast regions, including some of the challenges they face.

When exploring OE initiatives in Africa, one cannot leave TESSA out. [Teacher Education in Sub-Saharan Africa](#) (TESSA) was created in 2005 by the Open University and The Allan and Nesta Ferguson Foundation. A consortium was formed with 14 Higher Education institutions from nine African countries, and four international organisations. By 2010, the TESSA website was fully operational with a substantial bank of OERs that support national curricula and provide examples of participatory pedagogy. Resources are available in four languages and multiple country versions. Another established initiative is [OER Africa](#), which was founded in 2008 to collaborate with higher education institutions in Africa in the development and use of OERs, to enhance teaching and learning. Since its creation, OER Africa has engaged with many African institutions and developed and curated a whole range of resources, including research (papers, thesis, etc), open content, courseware, tools and institutional strategies and policies to assist capacity building, development and engagement with OER in Africa.

An important project for the development of OE in the Global South, including African and Latin American countries, amongst other regions of the world, was [The Research on Open Educational Resources for Development](#) project (ROER4D). This project built on and contributed to the body of research on how OER can help to improve access, enhance quality, and reduce the cost of education in the Global South. Hodgkinson-Williams et al. (2017) indicate that in Sub-Saharan Africa, the availability, stability, speed, cost and limitations on internet connectivity are major factors in the extent to which educators engage in digitally based OEP, including downloading and uploading OER. In East Africa however, there is an absence of consistent internet connectivity; and limited access to laptops and desktop computers, which limits teacher educators' exploration of and familiarity with OER (Wolfenden et al., 2017). A similar situation was reported at the University of South Africa (UNISA), where adequate internet access was available only to educators and students did not have reliable access because they lived in poor, rural areas with weak infrastructural support, or in urban townships far from the UNISA satellite centres (Cox & Trotter, 2017).

In Latin America there exists collaborative networks, [OE LATAM](#) Regional Node from Open Education Global includes experts from North, Central and South America with extensive

experience in OE according to the particular needs of their regions. But countries are at an early stage regarding the adoption and mainstreaming of OE (OER Regional Consultation, 2017, p. 10), while implementation is steadily increasing. Even though many countries in the region show high use and practices of digital resources like remixing of educational materials, lack of knowledge of open licenses, lack of specific policies and funding, and lack of country champions (only Brazil, Chile, Colombia, and Ecuador have country champions) awareness-raising and capacity building tend to delay its uptake and remain a challenge to be overcome (OER Regional Consultation, 2017).

Furthermore, "each country has its own approach to funding basic and higher education, which impacts national an/ institutional policies geared towards promoting OE in these sectors" (Toledo, 2017, p.121). Thus, while Brazil has managed to establish a national basic education OE policy (Ordinance of the Ministry of Education – 415/2018), Colombia "is more at a nascent stage of OE policy development" (Toledo, 2017, p.121). In stark contrast, "the nature of OER management and extent of policy implementation in Uruguay suggests that it is an enabling environment for current and future open policy development" (Toledo, 2017, p. 121). Chile does not have a national OE policy *per se* but it's important to mention that in 2018 it founded the Open University of Recoleta with a mission supported by an institutional policy based on OER. Like other Latin American countries, a national OE policy is still in process in Mexico. But two main universities in the country "The National Autonomous University of Mexico (UNAM), which is a public University, and the "Monterrey Institute of Technology" (private) have established policies on OERs, which will possibly include the National Council of Science and Technology (CONACYT) (Castaños, 2021). Additionally, in 2019, Mexico was awarded the UNESCO OER Implementation Award by the UNESCO/ICDE Chair Open Educational Movement for Latin America International. It is clear from the discussion above, that despite efforts, OE strategies and policy development in Latin American countries are still in the early stages, despite UNESCO urging countries to create such a policy (Castaños, 2021).

Another challenge faced by Latin American countries is how to showcase more efficiently their OE initiatives to the Global North. It is necessary therefore to provide support to stakeholders via the use of resources and tools that afford more visibility to these initiatives. Research is also imperative for OE advocacy, policymaking and peer support and an initiative like GO-GN can be a great asset considering the network's core mission.
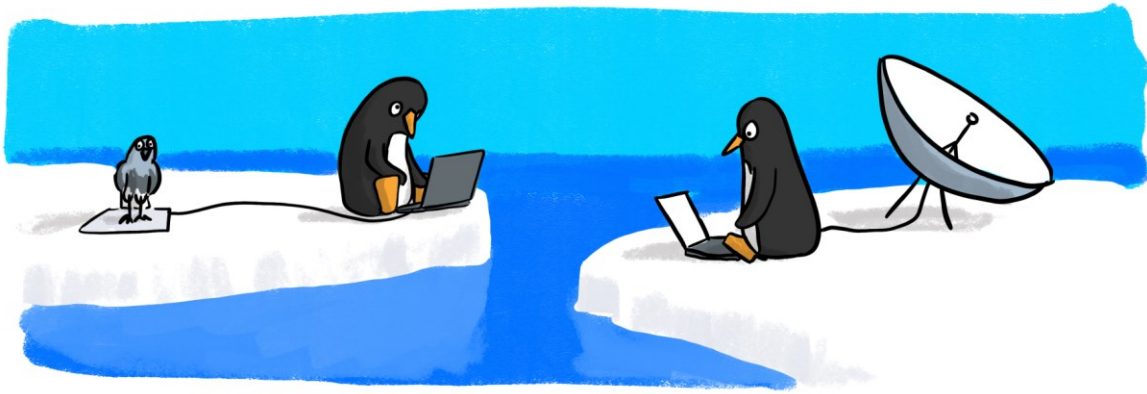
There exist international initiatives, research projects and networks, mostly in Africa, while in other contexts like in Latin America it appears that initiatives are local and disparate between countries. The following sections describe in detail Phase 1 of the project in Africa and Phase 2 in Latin America. As specified in the introduction, each of the phases was implemented in collaboration with Judith and Viviane to explore the local context of EDI in OE for GO-GN. Even though we used similar instruments findings and discussion are done differently to include the varied initiatives in each location.

Phase 1: EDI in Africa

The aim of Phase 1 (2018-19) was exploratory; its findings informed the initial GO-GN recommendations for EDI and provided the foundation for the next phase. Nine interviews were carried out with key OE experts and researchers in Africa. The findings from these interviews informed the activities undertaken during the two-day workshop that took place in Nairobi (Kenya) with four invited participants. Data collected during the workshop days were aggregated to existing findings and disseminated through several events, including blog posts (Pete, 2019a; Pete, 2019b; Pete, 2019c), workshops at OER19 (de Los Arcos & Pete, 2019) and a presentation at Pan Commonwealth Forum 9 (Bossu et al. 2019).

Methods

The interviews were semi-structured around a series of questions related to the definitions of equity, diversity and inclusion, barriers and enablers of EDI, value and role of communities to support EDI. The interview format was flexible, to allow for further in-depth discussion as appropriate. The nine interviews were transcribed, and the transcripts were imported into qualitative analysis software (NVivo). The analysis examined responses to the questions included in the interviews, and trends across the dataset. While illustrative quotes are included, the data has been anonymised in the report. For attribution of quotes, the nine participants are referred to by the letters A to I.

Findings and Discussion

Responses from the interview participants are discussed under several headings, each drawing together one to three related questions from the interview schedule. The headings include: "Defining EDI"; "perceived barriers and how to overcome them"; "ways to support and how to amplify voices"; "what is taken for granted", and "what must be challenged; and the role of openness".

Defining equity, diversity, and inclusion

The interviews began by posing the question of 'What is your understanding of an EDI community?'. The discussions which followed typically divided into its constituent parts in the interviewees' responses, as the concepts were related but distinct.

However, it was also important to emphasise the distinction between equitable and equality. Equality, in terms of seeing all people as equal and presenting equal opportunities, tells only half the story. Equality may be simplistic in practice, and equity acknowledges that there are differences in the support that individuals need.

> *When it comes to equitable, I would like to make the distinction between equitable and equality. I think that's very important that it's not about providing equal opportunities for everyone from north and south, it's about getting away the barriers. Addressing the injustices of the past, addressing the silences. (G)*

While there was some variation in terms of definitions of diversity, the discussions were underpinned by actively engaging with participants (as students or research partners) from a range of social dimensions such as social status, employment status, disability, gender, colour, ethnicity, and sexuality.

Moving from conceptualising equity and diversity, the two concepts were strongly linked in that an equitable community was broadly discussed in terms of all individuals being able to participate to the same degree, free from discrimination and presenting equal opportunities. Within the context of academia and education, interdisciplinarity can be a particularly important dimension of diversity. Several participants flagged the importance of bridging disciplinary divides.

Cautioning assumptions about the nature of diversity were raised, noting that diversity may be context dependent, and northern or western assumptions can lead to paying only lip service to diversity rather than meaningful engagement with the issues. For example, in many western countries "boys and girls going to school is a given. It's not an issue (E)". But there are many regions in the world where education for boys and girls is not a given.

Similarly, discussions around the definitions of inclusion were linked to the concepts of diversity and equity. An inclusive community was broadly understood as being one which fosters and supports diversity in its participants.

> *The inclusive curriculum is very much about a conscious understanding about diversity and making sure that education is for all [..] It is really trying to be an all-encompassing learning environment where what people are able to engage, to share and debate and the ways in which they can, which I guess the equitable standard of learning brings into account. (C)*

As such, discussing inclusion also raises the complementary issue of thinking about who is excluded, and how.

> *When we talk about inclusive, we think that anything will go, so we will include everything. But surely if we take social justice and diversity and equitable as norms, there's somethings that we'll not include. (G)*

Perceived barriers and how to overcome them

The second section of the interview structure focused upon a pair of questions, 'What are the barriers to achieving an equitable and diverse community?' and its follow-up, 'How can these barriers be overcome?'. A range of issues were identified but discussions about barriers could be broadly divided into five main areas: academic and institutional leadership, resistance to collaboration, infrastructure and technology, digital literacies, and funding.

Lack of institutional leadership and communication, or that the academic leadership prioritise inappropriate measures of esteem such as finances and metrics, was the most prevalent perceived barrier. Also, related to institutional and leadership barriers, and not restricted to senior academics, is a perceived barrier in relation to resistance or not recognising the value of working collaboratively or openly. However, it is also worth noting here that in addition to changing individual and cultural attitudes to openness, structural barriers to collaboration also exist. An example used by one participant was GO-GN itself as demonstrated in quote below:

> There might be groups of people within GO-GN who are already connected to each other, and they seem to have their own bubble and so on, and other people who are completely new, and they don't know anybody, how do you help those people feel like they fit in, rather than feeling like misfits in the midst of everyone else, who's already there and already knows each other? (D)

Technology and digital infrastructures were other prevalent issues creating barriers to EDI. This included both access to the Internet (in terms of whether there is access at all, and bandwidth), and hardware (computers and smartphones). Infrastructure and technology were also linked to another barrier identified in the discussions: digital literacies. Digital literacies and the lack of capacity building opportunities in relation to both staff and students can be related to the issue of institutional leadership.

Funding has already been alluded to in relation to infrastructure and noted around the issue of digital literacies that availability of funding may be ineffective if skills are lacking. Funding was also important as a barrier to participation in events and social divides more generally.

Discussions about how to overcome the perceived barriers mirrored the range of barriers identified. There was also a theme here in relation to how overcoming barriers is framed; it is not simply a case of overcoming barriers, but the importance of recognising that they exist. In acknowledging that the barriers are complex and do not lend themselves to easy solutions, a combination of strategies are all required, and we should all model the changes we want to see through our own practices. Therefore, "we all have to take responsibility… we can all make change by vary attitude and our approach to people and our humanness (C)".
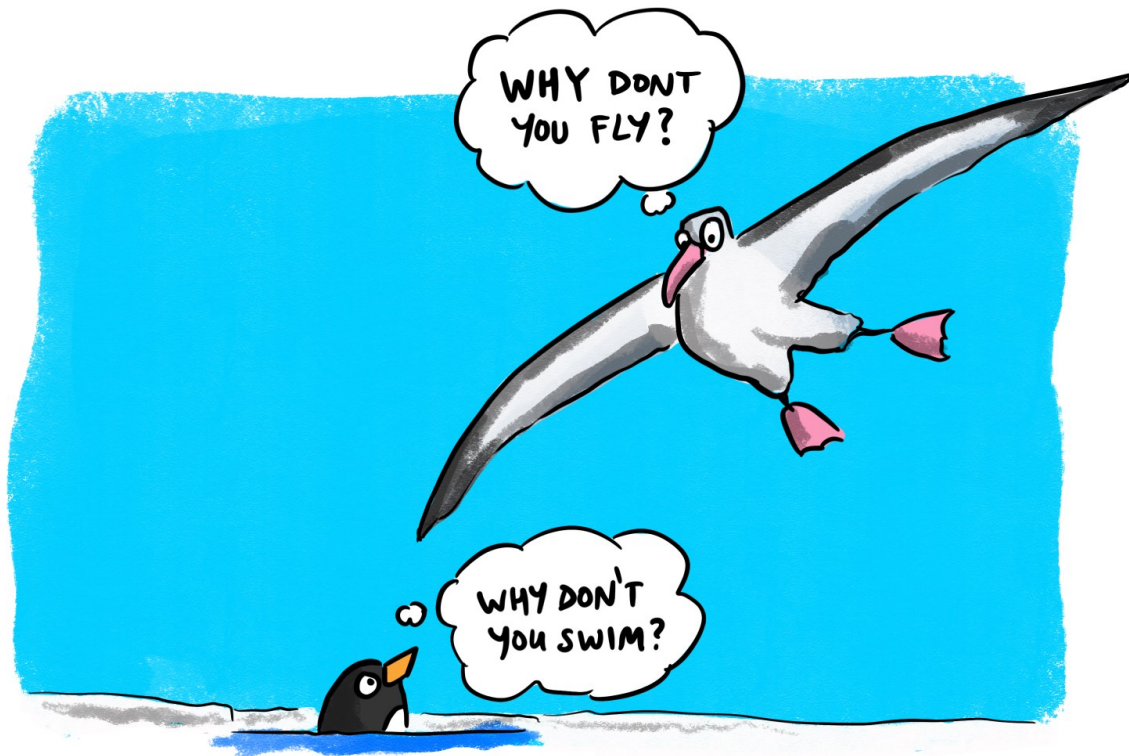
Two main themes emerged in terms of how to overcome the barriers: institutional and academic cultural change, and formal recognition of the value of OEPs. Institutional and academic attitudes are deeply ingrained, but a cultural shift toward openness is seen as a way of changing this. A suggestion from one of the participants was a change in policies "Changing, pushing, negotiating and lobbying for the university policy to change in order to allow OE measure (H)". In addition to changing metrics, more formal recognition for the academic engagement with openness was recommended. For example, through probation and promotion.

As a counterpoint to resistance to collaboration being a perceived barrier, more collaboration is seen as a logical way to overcome this. Funding is also noted as being able to play a role to support collaboration amongst Global North and Global South colleagues, and funded collaborations can be seen as having high institutional reputational value.

In relation to supporting students, two strategies for overcoming barriers were discussed, including initiatives to decolonise the curriculum, and support internationalisation and awareness of different Higher Education sectors. Providing a supportive network for new PhD students in understanding the international landscape for choosing a doctoral institution may be a particular role for GO-GN. Less widely discussed ways to overcome barriers included using participatory approaches as a more equitable way of conducting research and valuing local perspectives, and a commitment to sharing (through a shared platform or open access publishing).

Ways to support and how to amplify voices

Questions centred explicitly upon practical steps to foster an EDI community included 'Does the Global South need support, and if so, what form should this take?' and 'How can we amplify the voices of upcoming Global South researchers?'.

Training and mentorship emerged strongly as the main ways to provide support. An area where this may be particularly important is academic writing and dissemination, reflecting the influence of academic publishing as a theme throughout the discussions more generally.

The importance of training was not limited to PhD students and early career researchers, but also highlighted for senior academics, which relates to the need to support institutional leadership and cultural change.

> *If we can train managers, we can educate them, we can come up with ways to change the way they perceive things it can spill down now to the rest of the people in the institutions. (A)*

It's also worth noting that many of the resources are already present, including people and content. It seems more a matter of organisation and co-ordination to make the best use of what is already available to promote EDI.

The potential for research collaboration with partners in the Global North was also identified by some participants as a way to support EDI in OE. However, it is not simply a case of funding or kudos, but as a way of experiencing the realities of working in and with academia in the global north and the power asymmetries it embodies, the power relations and where research fundings come from. Thus, collaboration between North and South should take into account:

> *The danger of asymmetrical power relations. This known academic from the north will take on emerging scholars from the Global South in a very paternalistic way, but whether it's good or bad, they should experience that. Unfortunately, the money for most international research comes from the global north, and we need to play the game. (G)*

Academic publishing was also widely viewed as a mechanism to amplify voices from the Global South, through open access publishing, positive practices such as co-authorship and proactively seeking out and citing authors from the Global South, and challenging academic publishing to be more inclusive in terms of epistemology and methods, for example. Additionally, developing OERs is also an important form of publishing where voices and perspectives from the Global South can be cultivated.

> *Scholars and scholarship is available in all parts of the world because there's excellent scholarship going on everywhere but not everyone's voice and scholarship is*

getting everywhere. I think OE resources offer a great opportunity for scholars to licence their work and make sure they have a voice through OE resources. (C)

The issue of academic publishing was also underpinned by the power asymmetry between North and South, and as such this is also important to challenge in relation to voices from the Global South as partners in research activities and collaborations.

Southern researchers or emerging scholars from the south should make the point that we are not servants, we are not administrators, we are not clerks. We may not have the expertise that they have, but we are researchers in our own right [..] I think the researchers in Global South must step up. Own the game, own their voice, make their voices heard, find ways. And in that we need to collaborate with the North. (G)
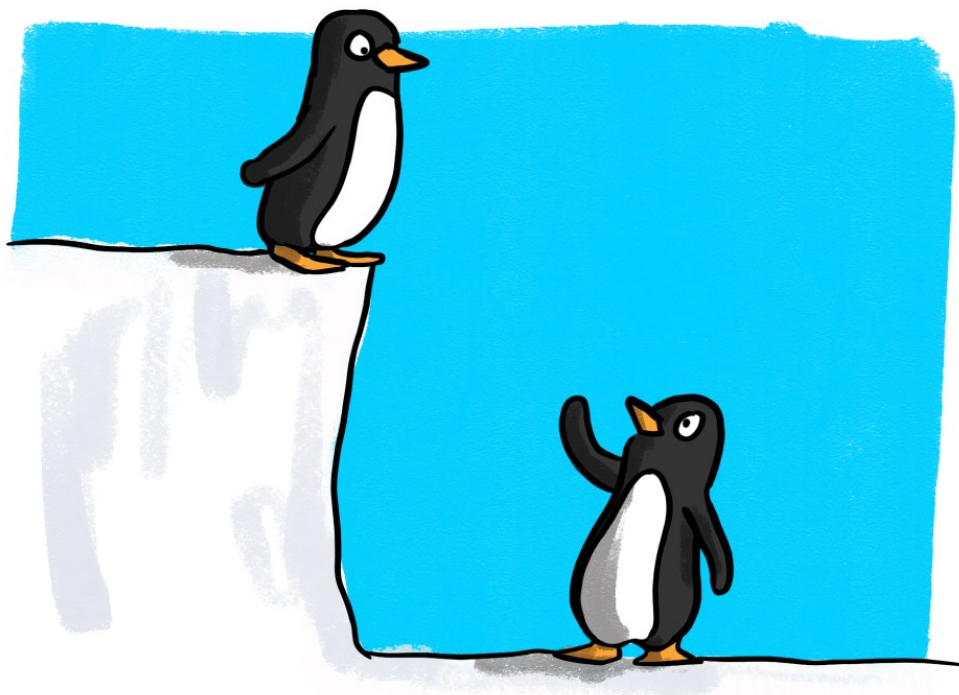
What is taken for granted, and what must be challenged

This section comprises discussions related to the questions which focused upon power and dominant social structural issues, and how to challenge hegemonic ways of thinking. The questions included 'What are we taking for granted?', 'What structures need to be challenged?', and 'Are there nondominant views which we need to embrace?'.

Responses to the question of 'what are we taking for granted?' were varied, but one of the most frequently cited was taking African culture for granted. By often seeking to model the Western and Northern, African culture is taken for granted, at its expense. One example given was the use of Twitter for professional networking, which is a given by the Global North, but not all African researchers and scholars use it. Thus, the assumption that

everyone uses Twitter to access information and network is wrong and should not be taken for granted.

Another assumption by some colleagues working with the Global North, assumptions about proximity, mobility and time zones are often ignored from the perspective of partners in the Global South.

> *I think for European researchers they are near one another, to their networks, to their conferences. We from the Global South are excluded from a lot of these networks, and we often forget how far we are. How impossible as sometimes literally to break into those networks. [..] Often when we collaborate with the global north, it's their calendars that count. When they take summer recess in the UK, you should not try to contact them. (G)*

Two assumptions were surfaced in relation to the role of educational technology and openness. Several participants discussed having experienced technology being taken for granted as a solution, for example, through the assumption that an e-learning specialist can solve all problems, and similarly that simply making materials available online is 'enough'.

> *"We can't assume that just by having OERs out there that learners can have an equitable experience of education especially if it is that it's those learners who, for whatever reasons, can't access education and they're trying to do it on their own through the internet and pulling off resources but there's still disadvantage because they don't have the necessary learning community around them." - C*

Another assumption taken for granted is that openness is inherently a good thing, or that everyone is operating at or comfortable with the same degree of openness. Identifying how stakeholders feel and understand the levels of openness used in research, for example, can promote EDI as some could feel vulnerable with that assumption

Discussions around the question of 'what structures must be challenged?' were one of the areas which showed the greatest degree of consensus and crystallised around three key issues: challenging institutional and bureaucratic structures; challenging assumptions that northern or western perspectives are favourable; and academic publishing. Challenging Higher Education institutional and bureaucratic structures emerged as the most prevalent issue. For some participants, this institutional challenge is caused by the lack of understanding around open content and OEPs by institutional leaders. Thus, institutional structures to support such developments are sometimes non-existent. This lack of awareness regarding openness amongst both North and South institutional leaders can hinder collaboration and prevalence of power structures.

Related to the recurring theme of power and privilege, there is a need to challenge structures which assume that 'west knows best'.

"That's a hard one because one, the people need to appreciate their roots. If they don't appreciate that there's values in our African tradition, then you can't move forward [..]We have been sharing food, resources etc. Sharing of knowledge, skills, these resources will still be like sharing porridge, millet, okay. People will find it African to share." – A

Reflecting its influence upon power and prestige within institutional leadership and bureaucracy, the academic publishing industry is also viewed as a key area to challenge.

I think the Global South in every discipline needs a voice on every editorial board. We can make that demand, most of the editorial boards are white men from the global north [...] We need to challenge the relationship of formal education with academic publishing houses. Licencing fees of these journals are immense, and we need to question that, and we need to protest. The other structure that we need to challenge are the criteria for the ranking systems. If my citation index depends on digital journals in English, it published in Swahili, or French I will not be cited. (G)

Another structure that must be challenged, ways to expand the scope of academic publishing and peer review came through strongly in this area, not simply in terms of language but epistemology and promoting a wider range of knowledge production.

You'll be surprised it will be rejected, and when you try to write it in the way they think, which is not the way we think, it will be published. (B)

Related to the importance of academic publishing, and echoing the discussions around how to amplify voices, actively seeking to cite the work of researchers from the Global South was also raised – emphasising also that the research should be of equally high quality.

We really need to value the voices from the Global South. When I write an article, I do quote the dominant voices in the field, but I look for voices in the Global South that I can quote. I look for black scholars, I look for female scholars, that I can cite. (G)

With several of the participants, the discussions around non-dominant viewpoints focused upon ways of appreciating and supporting a range of different perspectives, such as localising content.

You have to take into consideration that the language that OE gives you, that English gives you more internationalisation. On the other hand, translating materials to the local language of the people gives you more reach and gives more visibility to OE. (H)

Similarly, encouraging provision of a range of modes for engagement with the network, to compensate for biases in any one form of engaging, particularly online.

I see networks helping out that way as opposed to networks being one uniform thing pushing people to doing a uniform thing. I think a network, to me it should be like WhatsApp. People form WhatsApp groups to do different things. So the network can be that. The network can be the platform of practitioners. But it allows all sorts of different views and supports it accordingly. (E)

Linking to the final question (of whether such a community can operate 'in the open', to be discussed in the next section), a non-dominant viewpoint highlighted in one of the discussions related to embracing an 'entrepreneurial mindset', with a view to making open more sustainable.

My understanding of open is not free necessarily but accessible. Now if we take a more entrepreneurial point of view to things, entrepreneurs and a more entrepreneurial view will make things open, will make things open and they'll still be able to sustain themselves. That to me, is the non-dominant view maybe in this sector and this thing which people are not necessarily looking at or looking into. (E)
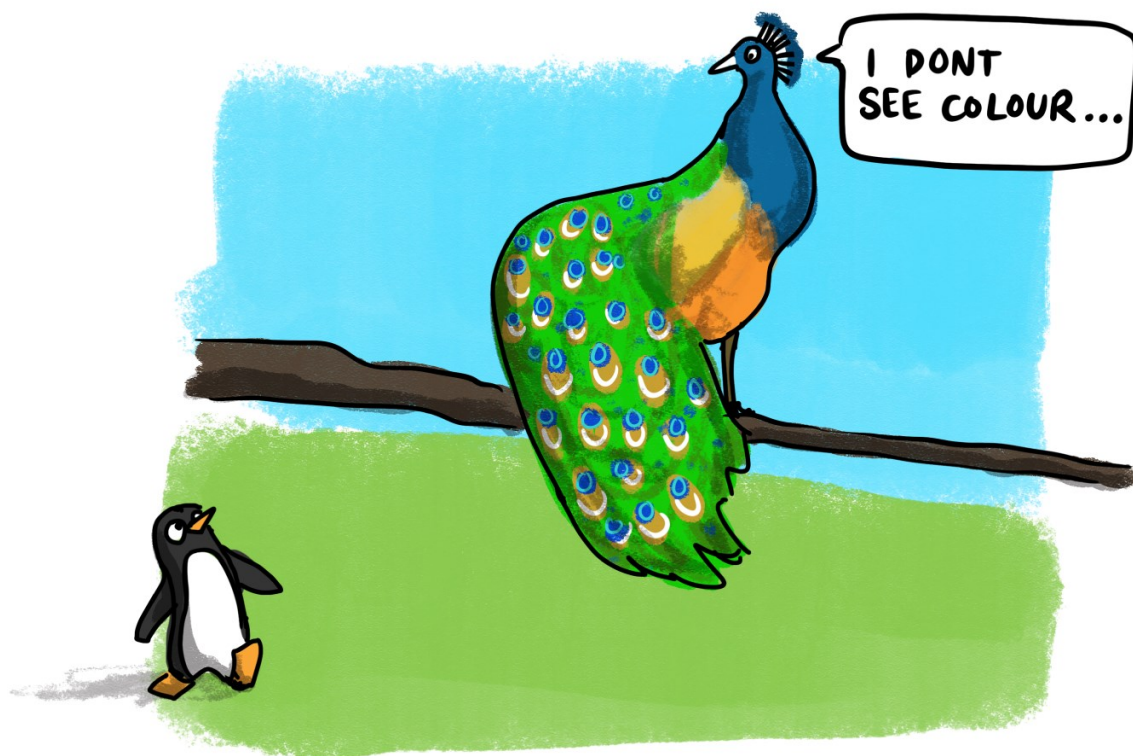
The role of openness

The final question addressed the role of openness, asking 'Can a diverse and equitable community operate in the open?'. All the participants were positive that it could, but with a number of cautionary caveats. As a corollary of the question, some of the discussions turned to exploring definitions of 'in the open', surfacing a range of implications for GO-GN as a community.

'In the open' should not be mistaken for not requiring support, structure, and recognition. It is important not to conflate 'open' with 'free' (financially) - online activities can create participation barriers and running a community on goodwill has hidden costs. Translating roles into the currency of academic recognition – for example, being able to show activities on a CV – can help with this.
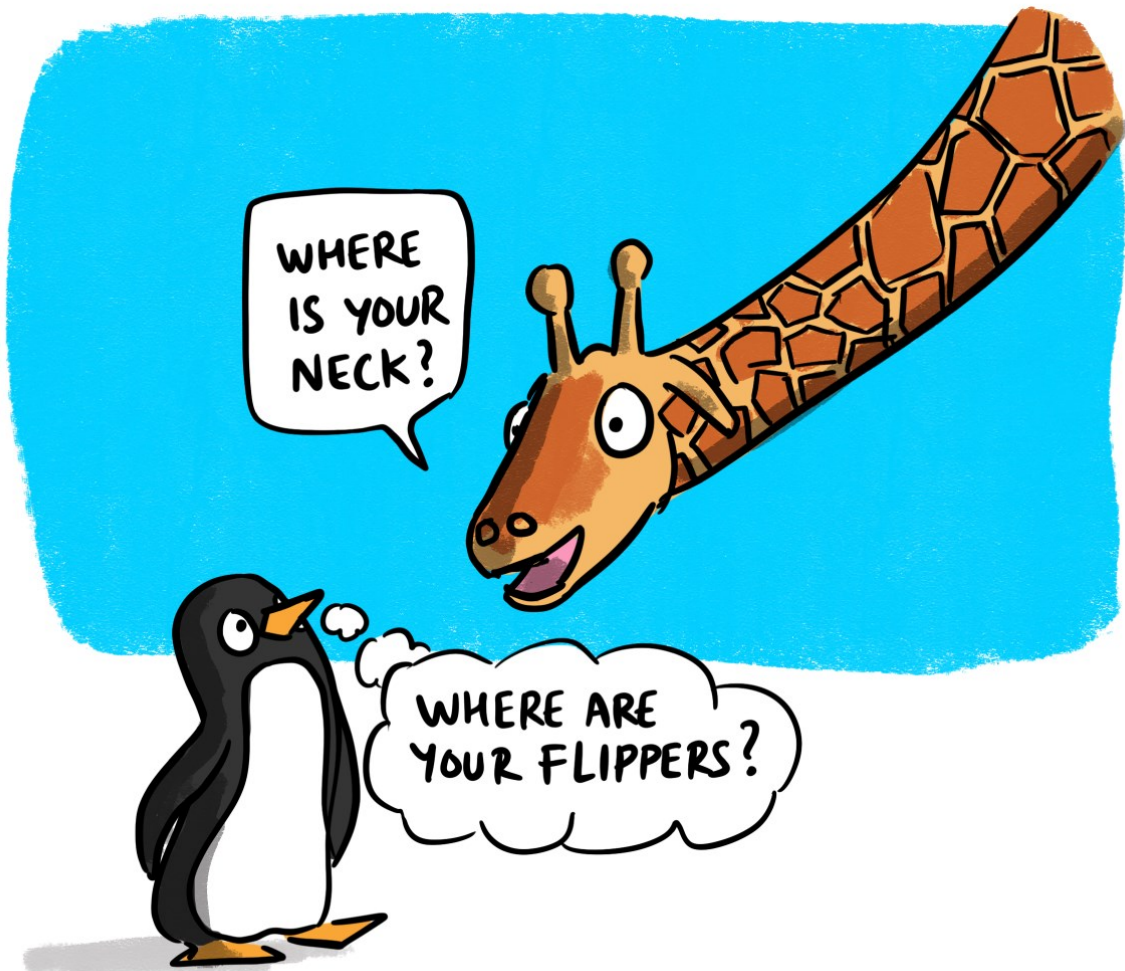
An open community needs to be able to support a range of levels of participation, engage with local communities, and be transparent in the scope of the community as any steps toward inclusion will be accompanied by implicit exclusions too.

> *I think there's a real importance of having a real diverse set of OERs that respect knowledges, geographies, and it's how you curate those together, how you even know they're out there, how you enable your students and professors to find them so they can use them. (C)*

Note that openness can be perceived to carry potential risks, such as loss of identity and intellectual property.

I believe that networks such as this should facilitate their members and should allow their members and should encourage spur on the members to have an influence in other groups. An individual such as yourself, for example, to maybe help create and spur on and grow other groupings locally and around here which can do things to contribute. Think of it as creating a grassroots movement of sorts where the members of a network such as GO-GN are the ones who are really helping to grow things as opposed to GO-GN being the one that delivers everything, but it can simply act as a facilitator. (E)

As such, to operate 'in the open', a network such as GO-GN requires some structure and policies, but it is important to adopt a position which is more aligned with being a facilitator rather than leader. research partnership, participatory research was identified as an effective way of appreciating non-dominant viewpoints.

Discussion

Discussions with the nine participants were rich and while the extent of consensus varied across the nine main questions used to structure the interviews, several recurrent themes underpinned the discussions throughout. How the themes mapped on to the discussions according to each question is shown in Figure 1. The themes highlight key areas in which GO-GN could focus its activities on relation to participants from the Global South, and included:

(1) Institutional leadership, hierarchy, and reward structures

(2) Academic publishing

(3) Collaboration and mentorship

(4) Surfacing post-colonial power asymmetries

(5) Infrastructure and supporting a variety of engagement
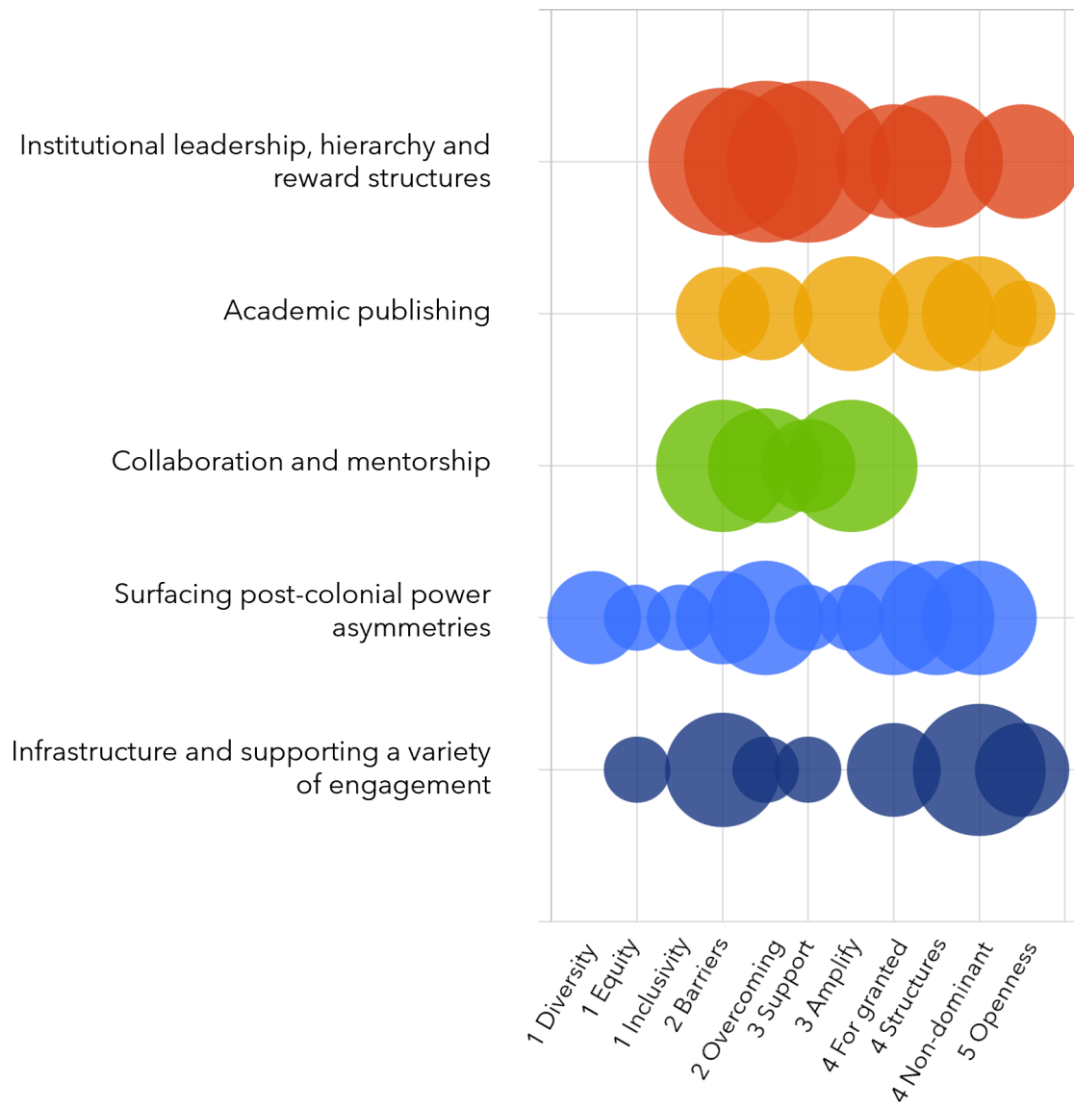
Figure 1: Mapping of themes (y-axis) onto questions (x-axis) in which those themes were raised. The size of the bubble reflects the number of participants who discussed each theme.

Issues relating to institutional leadership, hierarchy and reward structures were discussed particularly in relation to perceived barriers, ways to overcome them, and structures which need to be challenged to improve EDI. A lack of appreciation of OE and open practices at higher levels within academia can prove challenging for researchers and doctoral students in this area. However, this was coupled with optimism that training and raising awareness have potential to improve this, and if greater recognition and academic gravitas were associated with open practices, this would help foster institutional change. As such, there were also links here to two of the other themes, particularly academic publishing (due to the hierarchies and prestige associated with rankings and impact factors of journals), and collaboration (between institutions).

Related to the issue of institutional reward structures, the influence of the academic publishing industry was prevalent in several ways. It was mainly discussed in response to questions of how to amplify voices from the Global South, structures which must be

challenged, nondominant views and overcoming barriers. This range of questions reflect the fact that academic publishing was raised as both a way of improving EDI and a way of maintaining existing hierarchies. Open access publishing was viewed as a major barrier to accessing knowledge in the Global South, and widely viewed as something which researchers in the field should commit to when it comes to publishing their own work. Because of the power of the publishing system, several of the participants discussed actively seeking to promote quality research from the Global South through citation. There is also an overlap between this theme and that of power asymmetries, as the academic publishing system reinforces Northern or Western conceptions of academic writing, and Global South academics may face higher rejection rates.

Collaboration and mentorship incorporate two of the main mechanisms to actively support and promote EDI. This theme was mainly present in the discussions relating to perceived barriers, how to overcome them, and ways to provide support. Training and mentorship were highlighted as being a particularly effective way of supporting and developing early career researchers. Institutional resistance to collaboration was highlighted as a perceived barrier, and naturally seeking to foster collaborations was flagged to overcome this. Resistance to collaboration and working openly links back to the theme of institutional reward structures, and a feeling that academic culture does not value openness. Developing research collaborations with the Global North was largely viewed as a positive step, but with some cautionary notes. Such collaborations can bring funding and gravitas, but it is common for postcolonial attitudes to persist and partners in the Global South to not be treated as equals, which also links to the next theme.

Perhaps the most wide-reaching theme, as it was always present if not explicitly, was surfacing post-colonial power asymmetries. This theme permeated discussions around all the questions to some extent. While it is a deep-seated issue which requires major structural changes over time, there was a feeling that we can all seek to act responsibly by modelling the change that we would want to see, through our academic practices. It is not helpful to ignore these issues, but better to be honest with early career researchers in the Global South by surfacing them and raising awareness of the biases they will face within academia. Linked to the theme of collaboration, it was highlighted here that researchers from the Global South should form collaborations with the North – in addition to the benefits discussed in the previous theme, to experience these power asymmetries first hand. As a counterpoint, it should also be noted that calls for greater use of participatory research methods would help to form more equitable research partnerships.

Finally, infrastructure and supporting a variety of engagement brings together two issues in relation to using online networks (such as GO-GN) to support a diverse audience. Assumptions about internet access and the technical capability of devices can prevent engagement with activities, so using a variety of modes can support differences in bandwidth. Providing network activities which span a range can also help support

participants at different levels of confidence and practising different degrees of openness. Using a variety of online platforms and tools can also help to compensate for the biases in any one method. Supporting the network through a range of approaches, platforms and technologies will help to build a network which supports a wider range of participants' perspectives.

Next section moves forward from the experiences in this phase to participate with experts from Latin America, updating these initial GO-GN recommendations for EDI.

Phase 2: Latin American context and findings

To continue incorporating perspectives and experiences of underrepresented communities, phase 2 of the GO-GN EDI project (2020-2021) was geared towards developing guidelines for EDI in OE with relevant stakeholders from Latin America. The EDI Latin American project consisted of online interviews with twelve Latin American experts followed by an online workshop. This workshop was aimed at presenting and validating data collected and analysed from the online interviews. This online workshop consisted of questions geared towards extracting more data that could better inform the GO-GN EDI guidelines for Latin America.

Project findings were disseminated widely through blog posts, webinars, and conference presentations. Project findings were also posted on the GO-GN official site and were translated into Portuguese and Spanish to be accessible to all (Bossu & Vladimirschi, 2021a, Bossu & Vladimirschi, 2021c). This was one of the recommendations from project participants, that related data from this study should be made available in English, Portuguese and Spanish.

Methods

To recruit OE key experts in Latin America, the OER World Map was used as a resource in addition to the researchers' contacts in the region. Participants from most Latin American countries were invited to participate, and positive responses were received from experts from Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, Mexico, Peru, and Uruguay. All participants received an Informed Consent package prior to the commencement of the study.

The online interviews were conducted in English. However, two of our participants were not confident with their ability to speak in English so as a work around we asked them to answer the interview questions in writing, which were then translated from Portuguese to English. Recorded interviews were transcribed, and transcripts were imported into the NVivo software for qualitative analysis. Interviews were structured around questions regarding participants' perceptions of EDI; the elements needed to foster an EDI community of practice and research; the type of support that might be needed in the Global South, particularly in Latin America, for PhD researchers and early career

researchers in OE; what would be the elements of the GO-GN guidelines for EDI, to cite a few. Rather than develop interview questions from scratch, we decided to re-use and adapt some questions from the previous phase conducted in Africa to better fit the population that was interviewed.

Data analysis comprised examining responses to the questions in the interviews, and also verifying whether there were any patterns or trends across the dataset. Direct quotes from participants were used to support and clarify emerging perspectives and challenges as they relate to each of the questions.

For the second step of the phase, an online workshop was carried out with four stakeholders. Recruitment for experts to participate in the workshop was contingent on their previous participation in the online interviews. That is, all experts who had participated in the online interviews were invited to participate in the workshop. However, out of twelve participants in the project, only four participants agreed to participate in the online workshop.

Participants' main role was to provide us with feedback and additional data to ensure transparent, unbiased, and collaborative discussions, which substantiated final findings. During the online workshop, we presented data from the preliminary findings in segments and subsequently provided discussion questions based on these findings enabling participants to validate and expand on them. The workshop was recorded and transcribed, and transcripts were imported into the NVivo qualitative analysis software. Data analysis examined responses to the questions, and also verified whether there were any patterns or trends across the dataset. Four main coding categories and themes emerged from the data analysis: how EDI impacts Latin America; the need to gain more visibility; opportunities and challenges, and what is needed to build networks and foster collaboration to reduce barriers. Direct quotes from participants were also used to support and clarify emerging perspectives and challenges as they relate to each of the questions.

Findings and discussion

Direct quotes from participants are used to support and clarify emerging perspectives, challenges, and actions as they relate to noteworthy findings. To avoid overgeneralisation and prevent lack of focus on the participants' perspectives and experiences, a thick description of the participants' accounts is provided whenever it is deemed important to do so. While illustrative quotes are included, the data has been anonymised in the report. For attribution of quotes, participants are referred to by letters ranging from A to L.

Step 1: Online interviews

In terms of participants' understanding of the concept of a 'diverse, equitable and inclusive community', most participants noted that essential characteristics of an EDI community of practice and/or research are accessibility and the opportunity to feel valued and to grow. Concepts that were brought to the discussion and highlighted by the participants were 'equity' and 'inclusion'. These concepts play the important role of being the glue that holds together and provides voice to 'diversity'. Still, according to one participant, equity is closely related to social justice as it provides a space where everyone can be included. Inclusion adds value to the member in a community and enables him/her to effectively participate and be part of the community. Lastly, one participant noted that it is important to acknowledge the different characteristics and background, which individuals may bring to a community. The quote below illustrates participants' perspectives about these concepts.

> *A diverse, equitable and inclusive community is one where the rights of each person are respected, opportunities for growth are equal for all but also adaptable to the needs and capabilities of the individual, that is the community understood that an essential part of society is aware that individuals have different characteristics and needs and opportunities for growth shall be accessible to all (D).*

Participants also highlighted other issues that appear to bear important implications in regard to the equity factor such as the lack of attention to local needs; problems with investment in infrastructure; lack of infrastructure; lack of basic awareness and lack of capacity building to use tools and to engage with OER.

About requirements to foster an EDI community, funding, support and structure issues were raised by two participants. Capacity building to work with diversity and awareness raising on what it entails to be part of an EDI community of practice and/or research also appeared to be at the top of the concerns of two participants, as exemplified by the quote below. Lack of support also appears to hinder equitable and inclusive practices in Latin America, as participants pointed out.

> *The problem for us is structure, funding and support [..] People are doing some really interesting things, but they do it slowly because they just don't have support. The idea of equity and inclusion, is very hard to think about and we really don't have… we have a very ad hoc bottom-up approach to organising ourselves in Latin America (K).*

Other issues and concerns raised by participants concerning requirements to foster an EDI community were mutual respect and feeling welcomed, being open to learning from others regardless of their nationality and knowledge and belonging to a community that is transparent and offers guidance to its members, taking into consideration language barriers. The quote below supports these issues and concerns.

> *Okay, well the first situation is that we have one thing in common in Latin America, the language, you know? I think one of the most difficult situations will be for a new member, if he or she speaks or not in English, you know? (L).*

Indeed, English is the lingua franca and there are some other cultural aspects that hinder the fostering of an EDI community of practice and/or research such as not knowing how to work collaboratively in a community and being more of a competitive and individualistic society, which is the case in Latin America. Consequently, lack of language diversity can be a barrier to expand the OE movement in Latin America as resources are predominately in English. Additionally, participants questioned the Global North hegemony and how it establishes rules for diverse, equitable and inclusive communities with the Global South. Real diversity and inclusiveness appear to stem from the ability of an EDI community to incorporate with full acceptance diverse practices (e.g., research) and other social aspects such as different backgrounds and identities. Naturally, this entails taking into consideration and valuing local research practices in addition to respecting and understanding varying personal styles, motivation, and interests. The quote below encapsulates this theme.

> *…if we are able to recognise our differences and different backgrounds and identities, we can better shape things so we can respect those personal styles, personal rhythms of learning, personal motivations or interests of learning as a process. So, I kind of very much like, you know, personalisation as a process to this diversity trend (J).*

Overall, participants perceived several benefits of open research communities even though only five of them were familiar with the GO-GN network. Some cited benefits were: giving voice to usually ignored or little heard communities and/or groups; the possibility of sharing research, receiving constructive feedback and learning from other researchers; the possibility to work on research that will reflect a real problem and will have a more effective impact; the possibility of sharing open tools for teaching and research; participating in collaborative research projects and the possibility of belonging to a renowned network such as GO-GN.

In terms of barriers to achieve such a community, participants mentioned factors such as cultural differences and a lack of understanding of the fundamentals of OE, open practices and OERs. This means that not only a mindset change is needed but also awareness raising strategies are fundamental so that stakeholders are able to perceive the inherent benefits of participating in such a community. Lack of public policies that encourage participation, lack of institutional support, lack of funding, personal barriers and lack of structure were also perceived as major obstacles to participation in open research communities. The quote below exemplifies these barriers perceived by participants.

> *Lack of open research policies; researcher's culture and lack of proximity to the topic; structure for opening research. A barrier is the researcher himself, cultural issues. Another barrier is the intellectual property and copyright of the data, disinterest in*

> *the topic of OE. A capitalist view of knowledge, even when produced in the public environment. Fluency in English can be a limitation (F).*

Another challenge faced by many Latin American higher education institutions is how their departments and disciplines are structured, usually functioning apart from other departments. This hinders communication, cooperation, and collaboration, which are barriers to achieving open research communities.

Several issues regarding the question "What is needed to overcome these barriers and obstacles?" were brought to the discussion and not all the discussions came with prescriptions or advice on what is needed to overcome existing barriers and obstacles. While one participant stressed the need for government awareness about OE, another participant addressed the issue of the digital divide faced by disadvantaged people. In fact, lack of Internet access and low digital literacy skills negatively impacts the formation of open communities of practice and/or research. Conversely, other participants proposed some straightforward solutions such as establishing a clear objective, communication, and identity for the community; disseminating the advantages of research linked to open communities and establishing policies for funding research on OE; and capacity building for researchers and teachers on OEPs.

Another issue raised, albeit an important one, relates to the feeling of not having one's research valued, being considered a second-class citizen during presentations in conferences and feeling isolated.
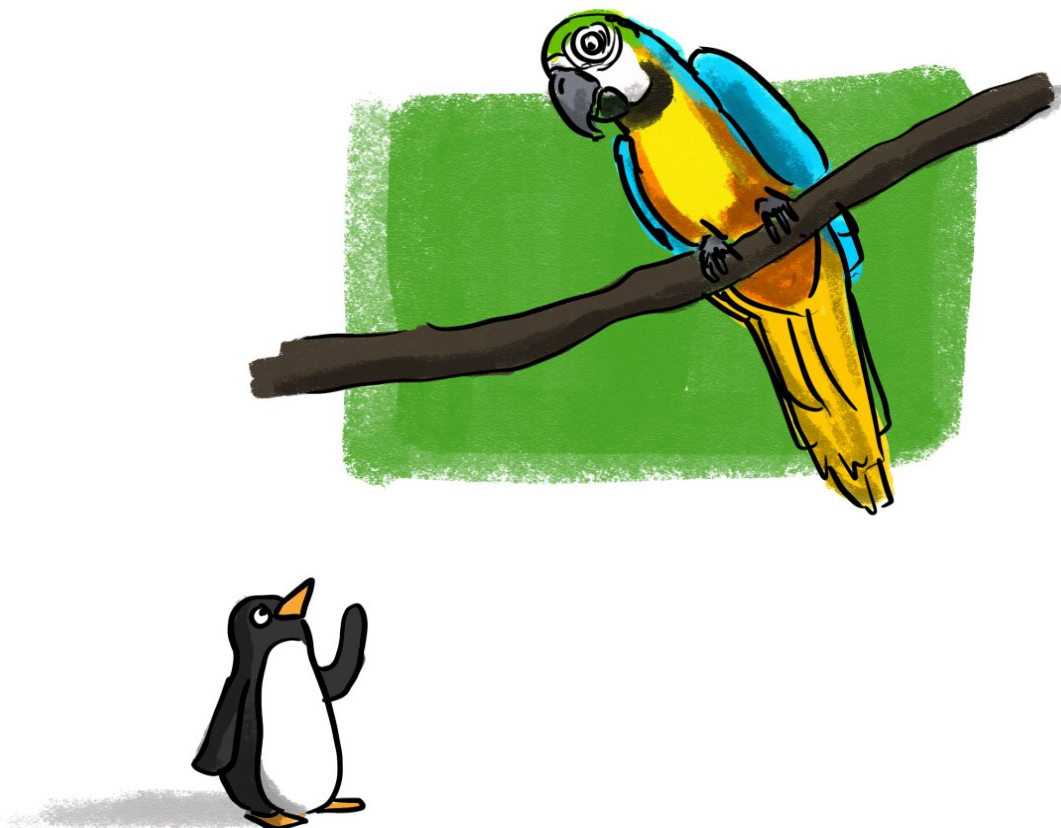
Accordingly, if diversity is one of the prerequisites for ensuring the success of an open community of practice and research, then all voices should be equally heard and valued.

It was a consensus among participants that support for PhD researchers and early career researchers in OE is badly needed. However, the kind of support that should be provided varied. Two participants stated that support should come in the form of guidance and clear directions. Other participants suggested using other strategies such as: training researchers to use OER and Creative Commons licenses; improving the technological infrastructure of schools; obtaining funding from the Government for the allocation of resources; teaching researchers and other educators how to create educational material and tools that meet the local demands; and training researchers on how to disseminate their research. Support for PhD researchers and early career researchers in OE should also include the sharing and dissemination of good practices; provide spaces and opportunities to meet and discuss OE from a Latin American perspective; allocate funds to implement a research agenda, and foster more research written in either Portuguese or Spanish. Additionally, researchers who are not fluent in English may need more translated materials and resources and may prefer to engage in a Spanish or Portuguese network due to the language barrier.

Regarding the question "How to amplify the voices of researchers in Latin America'', some participants felt that communicating and disseminating important events and conferences, and helping researchers reach out to different audiences through social media was a sound strategy. Another way would be to create channels for "publishing research results and products in other countries".

However, a participant pointed out that there is little interest in the social impact of such studies and that funding agents should give greater importance to these kinds of studies.

> *The funding agents need to care more about the social impact of the OE studies and this would amplify the voices of the researchers. The voice of the researchers, when you talk about the academic journals, has a very low impact because they don't – not everybody reads this kind of journals (C).*

Further, researchers should be encouraged to publish their studies in English, if possible, to reach a wider audience. Researchers who are fluent in two or more languages should also endeavour to publish their studies in different languages. Hosting international conferences spoken in Spanish, or integrating Spanish spoken sessions in an international conference, is also an effective way to amplify the voices of Latin American researchers.

> *The way to amplify the voices of researchers in Latin America is undoubtedly by disseminating as strong as possible existence of research communities motivating them to work on their projects by considering the dissemination of their work in all possible international institution spaces, to publish in English that will be a good way by promoting and amplify the voices of researchers in Latin America (D).*

The language barrier does indeed play a key role negatively impacting participation and the publishing of research in a predominantly English-speaking open community as previously mentioned in this report. Despite this, one participant suggested creating special sections in high impact journals aimed at hosting Latin American studies on OE to give researchers an opportunity to be on par with other researchers. Encouraging researchers to publish their studies in open journals was also perceived as an effective strategy to amplify the voices of Latin American researchers.

In terms of aspects that are being overseen/taken for granted, several issues were pointed out. First, that researchers or graduate students be familiar with EDI communities, OE, OER and open licensing. Second, how to get researchers from different countries to work on research projects collaboratively. Third, how to effectively disseminate OE initiatives in Latin America. Fourth, how to get authorities involved in OE and how to work together with them to establish policies, deadlines, and other actions. Finally, issues "related to the learning process, like attitudes, predispositions, values, as well as skills, different types of skills that enable so many things" (G). Another important aspect that is being overseen, according to a participant, is the differences in OEPs in different countries of the Global South, particularly Latin America.

> That is the main question, Global South is very different, and OE for the Global South is very different for each country. Maybe how we consider the conversation about the impact of the OE practice is very different (H).

In terms of existing structures or practices that need to be challenged, participants provided several examples. Namely, the production of scientific articles in Spanish; more specific public policies; better infrastructure for basic education; better dissemination of existing OER repositories and OEPs; the need to reduce inequalities in education, as everyone should have equitable and inclusive access; create more opportunities for teacher training in OE; and provide opportunities so that researchers are able to learn how to work in open research communities. Other existing structures or practices that need to be challenged according to participants are how to decrease the language barrier in the GO-GN network so that it really can be considered an EDI community, and how can Latin America become an important player and be taken seriously in the global scenario in the field of OE.

Participants also recommended some strategies that contemplate how an EDI community can operate in the open. For example, providing support for the creation of open-source software; establishing a local community based on the objectives and goals of GO-GN in different countries of the region; providing opportunities for sharing resources, good practices and research and thus, fostering interaction and collaboration; and inviting experienced and beginner researchers and providing funding for international publishing partnerships. However, the main concerns about how an EDI community can operate in the open seemed to be related to managing cultural differences and lack of funding to implement a working structure. One participant stressed the fact that people express

themselves in different ways and that not all open practitioners in Latin America can express themselves fully in English. This could also impact their ability to engage in social networks. Another participant stated that lack of funds to implement a working structure that takes the above issues into consideration (e.g., putting subtitles in a video, translating studies and reports) could hamper implementation efforts for an EDI community to be truly inclusive and transparent. The quote below underscores inherent cultural differences.

> *Not every culture – not everyone can speak in the same way [or in the same language]. Not all participants in the open are recognised in the same way [..] I think these different scenarios and to generate value from different practices or participating in the open is not always having visibility on social networks or exposing your practice. I think you can do a lot to develop the open approach but in a less exposed way, so perhaps we can, if we have to redesign what is the meaning of an open researcher (I).*

In terms of what GO-GN guidelines for EDI should look like, participants affirmed it would be helpful to receive ready-made guidelines from GO-GN so that they could eventually be replicated regionally. The guidelines should also include a GO-GN vision, recommendations, and processes for possible implementation of these guidelines.

According to the participants, effective ways of communicating the existence of open research communities such as GO-GN include: providing resources in Spanish or in other languages; offering informative webinars and workshops in Spanish or in other languages; providing the necessary support (e.g. short, clear guidelines in the local language); improving the GO-GN homepage; using different communication formats that highlight the benefits and advantages of belonging to the GO-GN network; selecting different universities to disseminate GO-GN's guidelines; creating diverse dissemination products (e.g. an interactive page resource, policy briefs); and disseminating materials translated into the local language to graduate schools.

Lastly, the final question posed to the participants was related to the strategies needed to raise awareness of the GO-GN network. Although participants had important contributions to make regarding this topic some suggestions that appeared to be redundant or had already been previously addressed, for example those related to language barriers, will not be addressed herein. Strategies and key recommendations proposed by participants are as follows. First, develop further partnerships with Latin American universities to enhance GO-GN visibility and reach. Second, establish a clear objective, communication, and identity for the Latin American community. Third, promote the development of conferences, workshops, or seminars to build capacity in OE, including translation of content into Spanish and Portuguese. Finally, provide small research grants to disadvantaged students from the Global South.

Further recommendations to be incorporated into GO-GN EDI guidelines for Latin America include: selecting a professor from different universities in the region to be an ambassador of GO-GN in order to spread the word; having different people taking on the role of advocacy for GO-GN guidelines and foster participative mechanisms to write GO-GN guidelines (co-creative process of stakeholders from different countries creating the guidelines); and having an ambassador or an elected GO-GN representative work during approximately six months with five to six doctoral students from a particular region helping create the network, speaking their language and translating what needs to be translated.

The section that follows addresses findings from the focus group workshop.
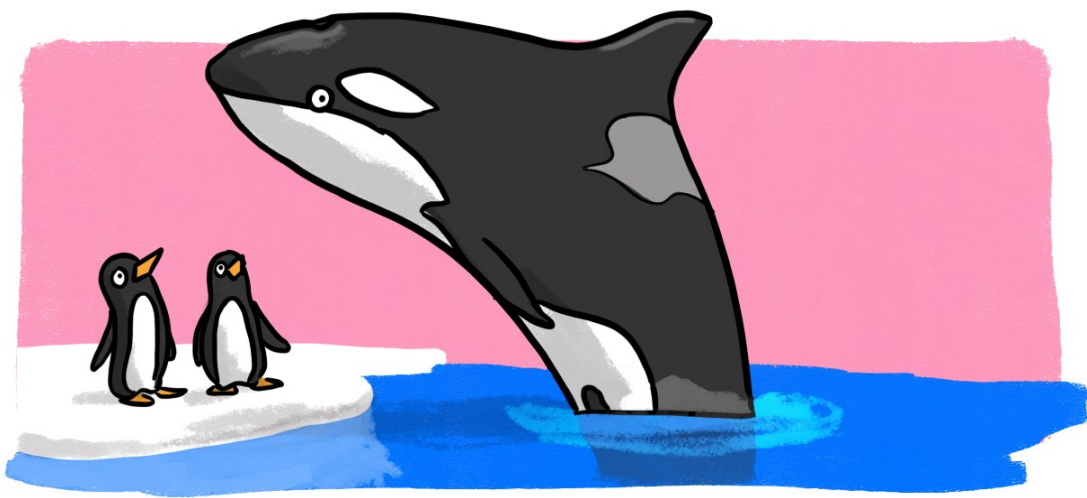
Step 2: Focus group workshop

To validate data collected and analysed from the online interviews discussed above, interview participants were invited to join in an online workshop aimed at presenting preliminary findings from Step 1. Although only four out of twelve experts participated in the workshop, findings from the workshop not only validated the preliminary findings, but also shed light on additional strategies and recommendations for GO-GN EDI guidelines for Latin America.

The first discussion question sought to explore participants' previous definitions on EDI and explore whether anything was missing from the definitions provided to validate preliminary findings. Participants agreed with their previous definitions and notions of these distinct but related concepts when applied to a particular context such as a community of practice and/or research. Nonetheless, they highlighted and added that these concepts can be somewhat tied to politics and the political actions or inactions currently in place in some Latin American countries; existing differences between states or regions in a country and the value that is given to equality in education. Participants also confirmed previous findings

and concerns related to the cultural differences between Latin American countries and added that this can affect collaboration and dialogue between these countries. All of these factors appear to negatively impact EDI in Latin America. The quote below exemplifies how this impact may somewhat hinder efforts to foster EDI communities of practice and/or research in Latin America.

> *From Mexico to Argentina, we are very, very different countries despite being the South and with different cultures among different countries and one other thing that it's failing or it's not working is like we also have a lot of, I don't know, limitations about working within ourselves as countries, like Costa Rica being next to Nicaragua [..] Being very close to countries in the South and you know we are not even being diverse within our Global South (C).*

These inherent regional diversities, as reported by the participants, underscore the need for Latin American efforts in OE and with OER to be made more visible to the Global North, which poses both challenges and invaluable opportunities, as will next be presented and discussed.

The second discussion question focused on 'How can we reduce the barriers and increase EDI in GO-GN?'. One participant raised the issue of the importance of having the Global North become more aware of existing Latin American OE initiatives to be included in the global scenario. This translates into more visibility required to reduce barriers and increase EDI in the GO-GN network. The quote below underscores this issue.

> *In some ways when the Global North thinks about EDI, it's about how to include them but we are already included, we already do things. It's about visibility (A).*

To gain more visibility, one participant pointed out the need to develop collaborations between the North and South, so that research and other publications are then disseminated not only in English, but also in Spanish and/or Portuguese. This would enable advocates and researchers to exchange meaningful experiences and could help pave the way to new ideas. Another participant claimed that having more publications from Latin American countries available in English could be a way to reduce barriers and bring more visibility to the work that is done as it would provide an opportunity for the Global North to better understand the work that is being undertaken in Latin America.

Finally, in terms of gaining more visibility, reducing barriers, and increasing EDI in the GO-GN network, participants brought to the discussion both challenges and opportunities. Challenges included: existing initiatives and/or actions not being recognised by the Global North nor by other regions within Latin America; the fact that while research can be made more visible via publications, OER sharing and creation tends to be more community-centred and is not usually disseminated or shared with other countries in Latin America; and the lack of a regional international organisation (i.e., European Commission), which holds

the potential to improve communication and exchange of networks of collaboration and/or practice in the region.

Another challenge, as stated by participants, is the political divide. Indeed, the fostering and implementation of EDI communities of practice and/or research may be hindered by the political divide that exists between developed and developing nations. Therefore, fundamental differences of ideas and practices should be carefully considered to mitigate this divide to ensure there are effective strategies that promote a truly diverse, equitable and inclusive network.

In addition to the existing political divide, a participant questioned whether the Global North is aware of inherent differences regarding the concept of EDI between the Global North and the Global South. Another issue that was raised and that poses a challenge is the lack of understanding that while OER from the Global North may be of high quality, existing OER may not cater to the needs of the Global South. Still, according to this participant, this fact bears important implications such as the need for stakeholders from Latin American countries to work collaboratively so as to create OER that better fit with their reality and needs.

An issue that emerged in the workshop and confirmed some of the interview findings was the language barrier. One participant affirmed that if GO-GN wants people from Latin America to join the network, they should provide opportunities for people who are not fluent in the English language. However, it is worth noting that GO-GN has already taken some important steps to reduce the language barrier issue by posting on its website findings from this study both in Portuguese and Spanish.

In terms of opportunities, participants believed that belonging to a community of practice with like-minded researchers such as GO-GN could increase opportunities for networking, collaboration, in addition to promoting and holding theoretical discussions on OE. These discussions would be aimed at helping stakeholders from Latin America develop their own personalised and conceptual theory on OE.

Another opportunity that could emerge from being part of this community for Latin American scholars, according to participants, is the production of high quality scholarly papers developed collaboratively amongst colleagues and with the proofreading assistance from the GO-GN network, for example. This could positively impact the visibility of OE research in Latin America.

Indeed, belonging to a network such as GO-GN enables members to collaboratively exchange and publish papers on different topics in the field of OE. However, one also has to be an active member who is willing to put in the required work to achieve the desired visibility. This is very much aligned with the idea put forward by this participant since visibility needs to be constructed. Another participant brought to our attention the fact that there exists an academic journal in Peru that enables researchers to submit their research in

their native language (i.e., Spanish) and that the journal oversees translating the article or paper into English. In fact, this was a surprising finding since we were not aware before the online workshop that any academic journal in the field of OE was undertaking translations of published research. Nonetheless, this finding presents itself as an invaluable opportunity for GO-GN to provide more visibility to the work on OE produced by stakeholders in Latin America in addition to increasing representation and collaboration between the Global North and the Global South.

Workshop questions three and four were aimed at exploring 'What are your thoughts on these findings? Would you add anything else to these findings that you think is important?' and 'What are your thoughts on these recommendations? Would you add any additional recommendations? Findings show that participants recognize the need not only for more collaboration required to build a community of practice and/or research between the Global North and the Global South, but also the need to foster collaboration and promote exchanges and practices between Latin American countries. More specifically, regional networks of practice and research. Although these findings are not surprising given the tremendous political, social, cultural, economic, and educational differences between Latin American countries, they do corroborate the notion that Latin American countries may need to improve their network building skills aimed at creating more cohesive and effective communities of practice and research in the region. Notwithstanding, these findings also provide an invaluable opportunity for GO-GN to perhaps lead the way in helping Latin American countries build more effective communities by integrating members from different countries who can then disseminate good practices and share newly made contacts. The quote that follows exemplifies this existing gap.

> *I think before working with the Global North, we have to work together and then as a second step, we can go further and work with the Global North. We have to be bigger to work with them. Two things here. We have to make sure they understand that we are different from them and second, we need to create our own community and to make it more relevant, bigger and then we can join with groups from Global North (B).*

In terms of collaboration and building networks, two participants flagged the importance of the existence of virtual spaces, in addition to face-to-face conferences that may not be accessible to all, as a means for networking and collaboration. This is actually another excellent opportunity for GO-GN since it is rather easy to set up discussion forums with varied topics on its website.

Still bearing in mind the language barrier, two participants stated they hoped GO-GN would help them with publishing research, collaboratively written or not, in English to strengthen their local OE communities and that research comparing OE policies and practices between the Global South and the Global North would help raise awareness on inherent differences and contexts.

A participant, who is already a member of the GO-GN network, highlighted the fact that the network helps make one's work more visible and that a mentoring programme for new members could help them once they decide to join the network. Indeed, having a mentor could be helpful when language issues and cultural differences play a substantial role. Another participant suggested that GO-GN should create or translate materials such as publications, research resources and surveys in other languages and also reinforced the idea of being a mentor or a supervisor to non-English speakers who desire to be members. While these are all excellent recommendations, they would require GO-GN to build capacity for mentors and/or supervisors. This capacity building could be in the form of webinars and/or through the development of handbooks with clear instructions. It may also be possible to form a community of voluntary translators and proof-readers to address the language barrier issue.

Finally, a participant noted that GO-GN should be more present in Latin American conferences. This excellent recommendation would enable GO-GN not only to disseminate its work in Latin America, but also to recruit potential members. It is imperative that GO-GN's mission and actions be known in underrepresented continents such as Latin America.

> *I think GO-GN should be present in more conferences in Latin America, that's something that they have to work on (B).*

Discussion

This section offers a summary of the main findings derived from the data analysis and provides key recommendations gathered from stakeholders during phase 2 of the EDI in OE project in Latin America. It is important to highlight that GO-GN recommendations for EDI derive from data extracted directly from the participants during interviews and the online workshop.

During this study, findings have shown that EDI in Latin America is impacted not only by language barriers but also by inherent social, economic, cultural, educational and political factors. Thus, there should be more awareness of the above by the Global North for any OE strategy to be effective.

Additionally, existing Latin American OE initiatives and actions need to be made more visible to the Global North. Thus, more collaboration is required to build networks of community of practice and/or research between the Global North and the Global South. Moreover, mechanisms that foster regional networks of practice and research also need to be in place. Latin American countries may need to improve their network building skills aimed at creating more cohesive and effective communities of practice and research in the region and this represents a unique opportunity for GO-GN with its expertise to lead the way. Additionally, more collaboration and funding opportunities may be required to build

networks of community of practice and research between the Global North and the Global South.

The final and key recommendations for this phase derive from data collected, analysed, and triangulated during Step 1 and Step 2. Key recommendations are summarised as follows:

- GO-GN to increase collaboration with potential Latin American countries and their universities to enhance GO-GN reach.
- Recruit and build capacity of GO-GN mentors, supervisors, ambassadors in Latin America.
- Establish a clear objective, communication, and identity for the Latin American community.
- Raising awareness of Latin American OE initiatives in the Global North, this could be achieved through the development of and participation in conferences, workshops, or seminars.
- Translation of content, research outputs, etc. from English into Spanish and Portuguese.
- Provide small research grants to disadvantaged students from the Global South.
- Helping Latin American scholars or early career PhD students to produce papers of high quality in English.
- Assisting in the proofreading of papers or articles.
- Resorting to academic journals that already carry out translations of published research into English whenever possible.
- Promoting and holding theoretical discussions on OE in the regions.
- Offering of virtual spaces (i.e., discussion forums), in addition to face-to-face conferences that may not be accessible to all, as a means for networking and collaboration on the GO-GN site.
- Providing a mentoring/supervisor program for new members that are non-English speakers.
- Building capacity for mentors by means of webinars or the provision of handbooks with clear instructions.
- Forming a community of voluntary translators and proof-readers to address the language barrier issue.
- Having GO-GN be more present in Latin American conferences.

Lastly, while these key recommendations may result in increased participation and representation in the GO-GN network from Latin American OE and OER experts, GO-GN must take into consideration other findings mentioned throughout this report in order to effectively reach those who could potentially benefit the most from being part of the network. The programme (implementation phase) was formed to address some of these recommendations as detailed in the next section.

Implementation: Collega programme

The conceptualisation of the GO-GN Collega mentoring programme (Bossu & Iniesto 2022a; Bossu & Iniesto 2022b) emerged mostly from the recommendations of Phase 2 of the EDI project, which investigated EDI in OE in Latin America. Participants' recommendations were that more effective communities of practice around OE in Latin America should be created, enabling a broader dissemination of their open practices and research to Global North and beyond. This would help Latin American scholars in OE to produce high quality pieces of work in English.

Therefore, GO-GN Collega was established to address the recommendations above by pairing experts in OE from the Global North and South as mentors and mentees. In addition to being an OE expert, mentors would need to be proficient in English and in either Spanish or Portuguese. Mentees would also need to be working and/or researching OE and would need to be either Spanish or Portuguese native speakers. The key goal of the programme was to assist Latin American colleagues researching in OE to disseminate their work in English. Examples of dissemination could be a conference paper or presentation, journal article, book chapter, a blog post and so forth.

Collega is a Latin word for 'colleague'. Thus, the objective was to encourage collegiality between mentors and mentees so that collaboration and future partnerships could be built. The call for participation was widely published via Twitter, during the OE Week in March 2022, and through our networks and contacts.

The requirements for being a mentee in the Collega mentoring programme were that researchers would ideally be engaged in open practices and/or OE research, could speak either Spanish or Portuguese in addition to a bit of English (to complete the paperwork), wanted some assistance in getting a publication or a piece of work developed in English with the help of a mentor. While the requirements for being a mentor included being a researcher in open practices and/or OE research; speak either Spanish or Portuguese in addition to be proficient in English; and wanted to support a fellow Latin American colleague to get a piece of their work disseminated in English.

The objective was that after receiving the applications from mentees and mentors, the GO-GN team would then pair them up according to areas of interest and communicate it to each pair, noting that all contributions made by mentors and mentees to the programme would have been voluntary.

Proposed benefits for mentees and mentors included the opportunity to develop a piece of work collaboratively, disseminate open practices in Latin America, and to present at a GO-GN Collega mentoring online event about their experiences in the programme at the end of the year. Unfortunately, the programme did not receive the target number of registrations and interest from the community to proceed and it was paused while we had a rethink. Instead, we focused our efforts on the implementation of another project recommendation, which was the production of this handbook with a set of EDI guiding principles in OE, bringing together findings and recommendations from both phases 1 and 2.

The causes of this lack of involvement can be due to the fact that the programme was on voluntary basis and that scholars in Latin America are busy and underpaid, with workloads increased due to the Covid-19 global pandemic. As well as owing to the fact that the call for participation may not have reached potential participants, as many Latin American colleagues do not use Twitter regularly, for example. With these leasons learnt, in the future a similar programme should be considered within GO-GN.

GO-GN Guidelines for EDI in Open Education

The Guidelines were informed by findings of a two-phased research project, which investigated EDI in OE in Africa and in Latin America. These guidelines are a set of guiding principles that prompts questions and raises issues that should be considered by higher education institutions; individuals, including educators, managers, learners; for GO-GN, and other similar open initiatives wishing to create a more equitable, diverse, and inclusive open education environment so that it can benefit those who need it the most. Although the EDI guidelines were informed and contextualised by some of the regions of the Global South, it can be changed and adapted to suit different EDI contexts.

EDI guidelines for higher education institutions

- Raise awareness about EDI concepts internally and within their leadership team.

- Understand and recognise the value of working collaboratively and openly.

- Develop small, but actionable elements for the development of EDI in short and long terms.

- Develop a diversified measurement of success, in addition to existing metrics.

- Understand, identify and remove structural barriers to collaboration, including technology and digital infrastructures.

- Develop strategies to use effectively existing resources, including experts, content, infrastructure, etc. already available to meet institutional needs.

For individual practitioners

- Recognise learning barriers which might be intergenerational, and part of a historical legacy affecting individuals and communities.

- Acknowledge limitations of people's understanding of EDI, and their willingness to engage with it.

- Consider and acknowledge the marginalized voices.

- Recognise fairness and justice in all practices.

- Create a sense of belonging, where learners are valued, leveraged, welcomed, and respected.

For GO-GN, and other community-based initiatives

- Understand, identify, and remove structural barriers to collaboration.

- Understand the realities of working in and with academia in the global north and the power asymmetries it embodies.

- Assess assumptions about what stakeholders perceive as openness must be considered and discussed.

- Review the initiative's mission and vision to closely link with EDI concepts.

- Review membership registration forms to include elements such as disability, race, religion, nationality, gender.

- Conduct a diversity assessment within the network.

- Acknowledge the injustice of the past through perhaps allocation of resources to students.

- Award, recognise and promote research in EDI in OE.

- Work towards decreasing the language barrier within the initiative.

- Invite current and previous members (students and alumni) to be ambassadors of the initiative in their respective countries.

- Offer multilingual workshops and seminars to build capacity in OE to a broader audience than just English speakers.

- Provide research grants, in the form of fellowships or scholarships, to OE researchers from the Global South to develop and improve their research skills.

- Monitor and review the EDI guidelines annually to ensure that equity, diversity and inclusion is continually promoted at all levels of organisation's operation and practices.

Conclusions and final considerations

Despite the general association of EDI with educational debates, and its implicit presence within discourses and practices related to open education, our findings indicate the specific need to establish connections, acknowledgment, and attentive listening to marginalized voices.

GO-GN as a community of care understands the responsibility to create an inclusive environment for its members, to champion, promote and apply equity and diversity principles, while fulfilling the network's aims of raising the profile of OE research, supporting PhD candidates in the field, and developing openness as a process of research. Findings from these projects have assisted GO-GN to establish new and validate existing commitments such as:

- To create an open research community that promotes dignity and respect for everyone irrespective of your race, sex, disability, religion, nationality, or gender.

- To make open research capacity building and development opportunities available to students from Global South.

- To promote equity, diversity, and inclusion at all levels, which GO-GN believes is good practice and for common good.

- To encourage researchers and practitioners who feel they have been subject to any form of injustice to raise their concerns so that GO-GN can apply corrective measures for future growth.

- To regularly review all GO-GN open practices and selection procedures so that fairness, diversity, equity and inclusion are upheld at all cost.

Findings and recommendations from the GO-GN EDI projects have already impacted positively on both the GO-GN community and the wider open community, particularly in the Global South. We acknowledge that there is still work to be done. To uphold our commitment to openness and inclusivity, we intend to further investigate the integration of Equity, Diversity, and Inclusion (EDI) in Open Education (OE) across other regions globally, with a specific focus on exploring opportunities in Asian regions in the coming years
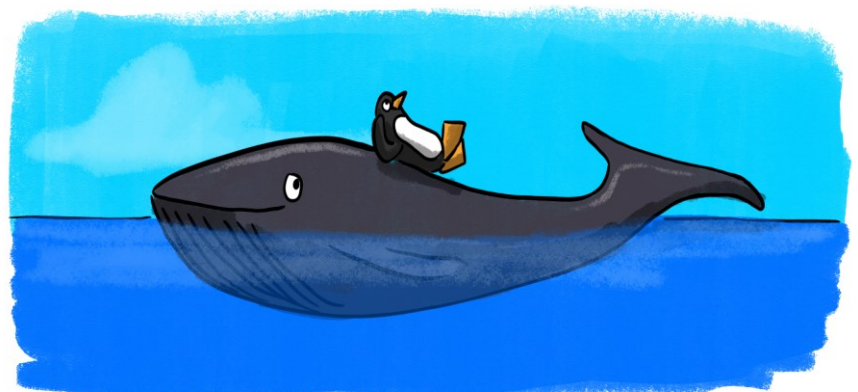
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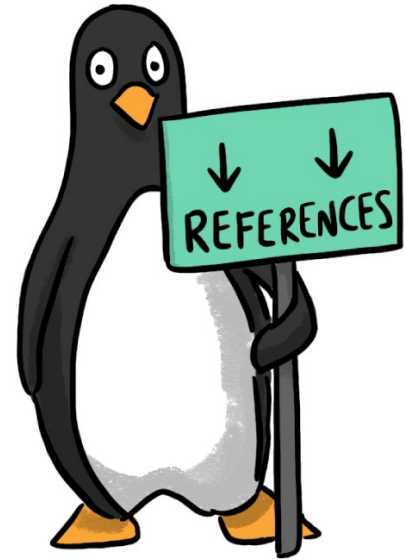
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