



CEB
Chief Executives Board
for Coordination

High-Level Committee on Management (HLCM)

Digital and Technology Network (DTN)

Workgroup on Virtual Events with Interpretation

Virtual Events and Remote Participation
Guidelines and Best Practices

(20 May 2020)

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1 Purpose of this document

This document is intended for internal use within the UN family. It provides guidelines and best practices for organizing a virtual conference, meeting, or event (collectively referred as “Event” hereinafter) and how to support interactive remote participation, based on experience gained since 2010 from various UN organizations. The Event can be statutory in nature where strict accreditation, authentication and access control are required, or open to the general public where no authentication or pre-registration is required.

Meetings can be fully virtual or *hybrid* (i.e. with physically onsite participants in a meeting room with remote participants joining interactively via web-conference platforms). Within this document, hybrid meeting means the chairman, secretary, moderator, interpreters and most participants are physically in the physical meet room with some participants joining remotely.

2 How this document is organized

This document intends to summarize different aspects of organizing virtual events and facilitating remote participation. If you are the Event organizer or if you’re interested in finding out all aspects of virtual Events and remote participation, you may want to go through the entire document. Otherwise you can select the sections that are related to your role in the virtual Event.

3 Your Role in the virtual Event

Refer to the table below showing the sections that are relevant to your role as:

1. Event Organizer – if the Event is a project, then the Event Organizer is the project manager who needs to manage all aspects of the project, from planning, implementing, supporting and closing the project
2. Chairman – is the chairman of the meeting. For large events, there may be the chairman of the plenary and sub-chairman of committees. All the chairmen will require briefing on chairing meetings in a virtual environment
3. Secretary – is the person assisting the chairman. Likewise, for large events, there may be multiple secretaries for different committees. All the secretaries will need to be familiar in using the web-conference platform in order to assist the chairman
4. Moderator – is the person who opens and closes the virtual meeting and assists remote participants in using the web-conference. When the chairman gives the floor to the remote participant, the moderator unmutes the remote participant and where necessary, posts the question / comment on behalf of the remote participants
5. Remote Participant – the person attending the meeting, can be active (taking the floor), or passive (listen only)
6. IT Support – person supporting the virtual web-conference platform
7. Audio-visual (AV) support – this is applicable for hybrid events or multilingual events with interpreters providing the service in physical interpretation booths. For fully virtual events with everybody participating remotely, including the interpreters, this function is not needed
8. Conference Service – the team normally taking care of organizing events (historically physical event) in an organization
9. Interpreter – person providing the live interpretation service for the meetings

	1	2	3	4	5	6	7	8	9
Selection of web-conference platforms	X							X	X
Registration, accreditation and access control	X					X			
Booking of virtual rooms for committees, subgroups, etc. and updating meeting schedule	X	X				X		X	
Virtual Event management dashboard	X					X		X	
Virtual room management and guidelines – role of Chairman, secretary, moderator	X	X	X	X		X	X	X	
Virtual service desk support	X			X	X	X			
Statutory meetings	X							X	X
Time management plan	X							X	X
After the Event - Summary, minutes	X			X		X			
Annex 2 – Guidelines for Remote Participants	X	X	X	X	X	X		X	X
Annex 3 – Cater for persons with disabilities	X					X			
Annex 4 – Check list of issues to be considered when planning a virtual meeting	X								

4 Guidance for event organizers - Planning for a Virtual or Mixed Event

This section presents additional issues to be considered when planning a virtual Event (fully or mixed). A checklist of issues to be considered when planning a virtual Event is provided in [Annex 5](#) of this document.

4.1 "Statutory" and "non-statutory" meetings

For the purposes of this document and only in order to facilitate the present discussion, meetings can informally and in broad terms be grouped into "statutory" or "non-statutory" based on whether their purpose, scheduling or regularity, rights of participation, and applicable rules of procedure are established by the Constitution and Convention.

"Statutory meetings" are generally vested with decision-making authority, are organized and conducted in accordance with the corresponding provisions of the General Rules of Conferences, Assemblies and Meetings of the Union (GR), and/or may be governed by additional working methods or rules of procedures adopted by the competent bodies or by statutory delegation of authority. Such "statutory meetings" may include treaty-making conferences; sectoral assemblies/conferences; sectoral advisory groups; Council and its working groups; study groups and working parties, etc.

By and large, other meetings and events not having the said characteristics could be considered as **"non-statutory"**. These meetings generally do not produce prescriptive regulatory outcomes. Event organizers of non-statutory meetings have considerably more flexibility in how they schedule, organize and conduct those meetings.

4.2 Rights of participation and registration in virtual meetings

Eligibility to participate in statutory meetings is derived from the rights granted to different categories of members. The Designated Focal Points (DFP) are responsible to approve registration requests for participation under their organizations, either from the default affiliation in the participant's profile, or because of the selection of a third entity the latter claim to represent at a given meeting. Since a person's role in a meeting and the nature of their participation (e.g. as head of delegation, delegate or observer) are related to the rights of the entity they are representing and cannot be inferred from the Global Directory, there may be a need to link the meeting registration and the way in which a meeting participant is identified on the online platform. The event planner may wish to ensure that a meeting participant's affiliation is displayed online so that their rights of participation can be easily determined during the debates.

Planners of non-statutory events have more flexibility regarding who can attend their events and, generally, do not have to take into account different participation rights attendees would have in statutory settings.

4.3 Languages used for virtual or mixed meetings

Many of the statutory meetings are required to be held (partly or in full) in the six languages, while others may be held in a single language. The need to support multiple languages is one of the key factors for determining the online platform used for the meeting. Oral simultaneous interpretation in meetings is normally provided with interpreters located in interpretation booths, which are specially fitted rooms with adequate audio equipment, floor space and sound isolation. A set of booths is connected to a specific physical room. Multilingual meetings with simultaneous interpretation require that the interpreters be physically present in a booth of one of these few meeting rooms. Their limited number and availability must be considered by the event planner.

Planners of single language meetings not only have much more flexibility when selecting a meeting platform, but also are not constrained by the need to reserve a specific physical room for the meeting. Refer to the section on planning multilingual meetings for more information.

4.4 Meeting hours and time management plans for virtual or mixed meetings

Those planning a mixed meeting will most likely follow the time schedule of the physical meeting time zone, remote participants must adapt themselves to the meeting hours of the physical meeting. However, a virtual meeting has different scheduling and time management considerations and constraints than they have when planning a physical meeting. Generally, physical meetings are scheduled in two blocks of a maximum of three hours each over up to an eight-hour period and with a minimum of 90 minutes for the lunch break. For virtual meetings attended by remote participants from around the world, this schedule can impose tremendous hardships. Event planners should consider more participant-friendly approaches to scheduling and time management when they have globally dispersed attendees, such as the ones explored in Section on Time Management Plan.

It is advisable that detailed daily schedules be made available to all meeting participants well in advance of a virtual meeting.

Additionally, the impact of the schedule and time management planning on the working conditions of interpretation teams for multilingual meetings will need to be considered. Section on Time Management Plan discusses interpreters working hours and the impact on time management.

4.5 Size or number of participants in virtual meetings

Because there are no travel costs associated with attending a virtual meeting, event planners should anticipate a larger attendance to the Event compared to a physical meeting. Statutory meetings tend to be highly interactive, with delegates presenting input contributions and engaging in discussions leading to a decision on how a specific issue will be addressed. These meetings may also attract a larger number of participants who have not previously participated in the meetings and who may not be familiar with the formal procedures and informal meeting customs. All this may result in more time being needed for deliberations. Event planners may wish to adjust the time management plans to give more time for the treatment of the agenda items compared to the usual required time in a physical meeting.

It should be noted that, especially with respect to virtual statutory meetings, potential technical limitations on the number of participants may materially impede the rights each Member State, which under the Constitution “*shall be free to make up its delegation as it wishes*” . As platforms have a maximum number of remote participants that can attend a given meeting session, it is necessary to verify that the expected number of remote participants can be accommodated by the chosen platform. Caution is therefore advised, and any such limitation should be coordinated with (and accepted by) the Member States in advance.

4.6 Pre-meeting information to remote participants

In addition to the typical information provided to meeting participants, such as registration information, event planners may need to provide them with additional information tailored for each meeting. The following is a list of the types of advanced information that event planners may wish to provide to the participants in virtual meetings:

- Guidelines for virtual meeting chairmen
- Guidelines for virtual meeting moderators
- Guidelines for virtual meeting delegates/participants
- Guidelines for virtual meeting observers
- Information on the remote participation platform, including technical requirements and user support
- Scheduling of test sessions for remote participants and for the meeting chairman.

Additionally, it may be advisable for the meeting chairman to initiate the meeting with a detailed presentation on how the meeting will be conducted, particularly any new measures resulting from the use of an online platform, for example how delegates can seek the floor and be identified.

4.7 Types of meeting outputs

Generally, ITU statutory meetings have mandatory outputs, the development of which may need to be considered when planning the event. These outputs normally include:

- Official meeting minutes
- Official summary of decisions
- Official summary records
- Official lists of participants
- Chairman’s reports.

The development and approval of some of these outputs may need to be included on the meeting agenda and accommodated in the time management plan.

The use of the virtual room public chat as part of the discussion should also be clarified, for instance, can an intervention via the public chat replace a verbal intervention, especially during decision-making in virtual meetings?

The official list of participants should be linked to the registration platform and generated automatically. For physical meetings, the registration for a meeting is validated when the delegate obtains a badge allowing access to the buildings or to the conference space, for meetings held outside of the premises. This linkage between meeting registration, access to the virtual meeting room and the creation of the official list of participants is equally important for virtual meetings, particularly for statutory meetings.

4.8 Use of a remote participation dashboard to access virtual meetings

Organizations that host various simultaneous virtual meetings frequently may wish to provide an online dashboard through which delegates can access their virtual meetings.

4.9 Platform accessibility for all remote participants in different countries

Event planners should understand that some platforms are not accessible in all countries and that some are not approved for use by some organizations and government agencies.

5 Selection of web-conference platforms

(relevant to: Event organizer, Conference Service)

This section outlines a non-exhaustive list of functions or features of the web-conference platform that may be prerequisites for your Event. Verify that they are provided by the platform; and if not, check with the platform provider if this could be implemented or find ways to improvise.

Reference is also made to ISO/PAS 24019:2020 which together with ISO 20108 provides the relevant requirements for the quality and transmission of sound and image to interpreters and from interpreters to participants, and for the configuration of the interpreter's working environment.

5.1 Multilingual or monolingual

Most web-conference platforms in the market do not support interpretation. For those that provide multilingual support, the following possibilities exist. However, for now, none of these web-conference platforms are compliant with the abovementioned ISO standard:

1. The platform is integrated with the physical meeting rooms and interpreters provide their service in ISO standard booths on premises with no interaction with the web-conference platform

2. Interpreters provide their service from anywhere (interpretation hub or from home) with good Internet connectivity, using their own equipment (subject to an agreement between Organizations and AIIC) running the Remote Simultaneous Interpretation (RSI) interface of the web conference platform
3. The platform provider has its own interpreters and provide interpretation as a service. The organization has no contractual relationship with the interpreters. While *technically* possible, this approach is currently not permitted *legally*, as discussed below.
4. The platform provides Artificial Intelligence (AI) interpretation service.

UN Organizations have long implemented the human and physical infrastructure for supporting multilingual meetings. Many organisations have contractual agreement with AIIC and provide ISO standard interpretation booths for oral interpreters to carry out their work on-premises.

With the introduction of web-conference platforms that come with an RSI interface, interpreters must be equipped with RSI compatible equipment and to be trained to provide their service through the RSI platform. Many rehearsals will have to be performed and support procedures should be established to ensure smooth operations.

Option 3 avoids the complication of option 2 above. However, the existing UN-AIIC agreement stipulates that interpreters must be employed directly by the organization, irrespective of whether the interpreter is an AIIC member or not, so purchasing interpretation service from the web-platform provider is currently not permitted.

Until April 2020, option 4 AI live interpretation remains unavailable. While many advances are observed in this area and AI speech-to-speech interpretation products are already being experimented, their performance is still considered too poor for official use in meetings. (See also the considerations for automatic captioning in Section 5.6)

1. The following guidelines apply for the use of remote participation in meetings with oral interpretation. For multilingual fully virtual or hybrid meetings where the quality of the remote audio could be an issue:
 - a. ensure that the interpreters are aware of that and perform tests with the key remote speakers
 - b. agree with and communicate to remote participants prior to the meeting on a fallback means for them to express their position on issues if their connection fails, e.g. somebody onsite to speak on behalf of the remote participant, telephone hotline, e-mail address, chat function etc. The Chairman must be aware and in agreement with the defined fallback mechanisms.
2. For both fully virtual and hybrid meetings, if one interpreter finds the audio quality unacceptable and decides to stop, agree in advance what signal to use to notify all interpreters to stop interpreting
3. Issue a disclaimer that the interpretation service is provided on a best effort basis as the quality of the audio due to connectivity or remote equipment issues is beyond the control of the interpreters

5.2 Active participation, passive participation, or both

Web-conference platforms always have a maximum number of active participants (remote participants may take the floor) and passive participants (listen only, similar to webcast, some platform provides message-based chat) that they can support. Some platforms allow the passive participants to be promoted to active participants and vice-versa. Confirm in advance if the platform meets the expected number of active and passive participants.

If the platform does not allow the swap between passive to active modes, ensure that participants are informed on how to switch between passive and active modes.

5.3 Authentication and authorization

Authentication is the process that uniquely identifies an individual and authorization refers to the right to attend an Event. Being a registered user in the organization's delegate database may not be sufficient, a person may belong to different delegations depending on the Event. Statutory meetings always require authentication and authorization. Accreditation is the process that decides who may attend the Event, which may be handled using CRM (Customer Relationship Management solutions) as a tool and has nothing to do with the web-conference platform. For each Event, select the platform that meets the authentication and authorization requirements:

- Is the e-meeting open to all hence no authentication is necessary, so anybody with the URL and passcode may attend the Event?
- Only participants registered to the Event and staff are allowed to attend the Event
- Only a very specific group of persons, delegates, or staff are allowed to attend the Event

Admission into the web-conference platform should be verified through the organization's authentication and authorization system.

5.3.1 Displaying entity of participants

Verify that the web-conference platform displays next to the participant names the name of the entity they represent at the Event. Note that a delegate's general profile in the authentication system can belong to one entity but may represent another entity for an event. It is therefore important to obtain the correct entity information from the Event registration system.

5.4 Group drafting of documents

While it may not be necessary for the web-conference platform to support group editing of a document (i.e. authorized persons may edit the document directly with automatic tracking of changes), some platforms (e.g. MS-Teams) have integrated this function into web-conferencing.

In any event, joint editing of a document may be done outside the collaboration tool (e.g., in Office 365 or Google Docs) and displayed in the shared desktop being projected through the remote participation platform.

5.5 Moderation

If moderation is necessary for a meeting, ensures that the platform provides the possibility to manage the remote participants. E.g. mute and unmute all function, raise-hand, multiple people can be moderator/host/chairman.

5.6 Captioning – Human or AI

Independent of human or automatic captioning, platforms vary in their ability to provide in-tool captions. In addition, some platforms have AI captioning with translation included as a standard offering.

Technologies that render speech to text in (semi-)real time are commonplace, with different levels of performance. Despite commercial claims, human generated captions are more accurate than automatically generated ones. However, technology continues to evolve and expectations / needs from users vary.

If captioning is meant as a support for understanding and not crucial for capturing content (e.g. when there are deaf or hard-of-hearing participants), an increased error rate might be acceptable. In order to qualify “acceptable”, please keep in mind the following:

- A qualified human captioners can deliver error rates of 1 word every 2-3 minutes (which is equivalent to accuracy rates higher than 99.9%). See the presentation by Mirabai Knight for more insight (A11yNYC conference, 5 Mar 2019).
- An automatic captioning tool delivering accuracy of 80% means 1 word incorrect for each 5; 90% is one out of 10, or on average one word wrong per sentence; 99% accuracy leads to 1 wrong word per paragraph.

As of April 2020, certain persons with disability groups consider that AI captioning/translation remains unmaturred hence should not be adopted for official meetings.

Other considerations include: does the platform allow embedding externally sourced captions? How customizable is the display of such captions (number of lines, text colour / contrast, positioning on the screen, etc.)? If the platform does not support captioning, consider an arrangement that can deliver acceptable results (e.g. arrangement of presentation window and captioning feed within the shared screen).

5.7 Platform usage cost

Fine out the cost of using the platform in advance to avoid budgetary surprises.

- Some platforms' charging model is based on a fixed licensed cost, while others are based on connection time on a per connection bases. Connections can be from the interpreter, moderator, chairman, secretary, or remote participants.
- Some platforms charge for additional features, for example displaying a caption or real-time automatic captioning. Conversely, some service providers may charge extra for the use of a specific remote participation platform.
- Some platforms may be charged on a per host account basis. Each account may create only one virtual meeting in any one time slot. This means to have three simultaneous meetings; it is necessary to buy three accounts.
- Some features may incur additional cost, e.g. interpreter training for using the platform, IT support cost for integrating the platform into the organization's web environment.

In case of cost based on connection time, it may be worthwhile to display a slide on the platform just before coffee-break and lunch break to ask remote participants to disconnect from the platform and join again when the meeting resumes. However, moderators should keep the virtual room open until the event is over for the day. For an Event that goes on for several days and with many parallel sessions, the savings could be significant.

5.8 Accessible from all countries or member states

Make sure the platform can be used by the remote participants from the countries where they are located. It may be unavailable due to sanctions, insufficient bandwidth, local restrictions, etc.

Work with the platform provider for solutions in case it is not accessible from certain countries.

5.9 Disaster Recovery and Business Continuity (DRBC)

Organizations may have an Operations Resilience Management System that handles DR & BC on an organizational level. Within the scope of this service, ensures that the web-conference platform has been designed with DR/BC in mind. Sometime this is presented as an availability percentage (e.g. 99.95%), or otherwise it can be up to the clients to select if the service can be delivered from one or more physical locations, hence providing increased redundancy and sometimes better performance. If the information is not available on the platform provider's website, contact the provider for written confirmation.

In addition to the above and in order to ensure a Business Continuity Plan, webcast services could be available for the participants that are not able to connect to the virtual meeting (platform overload or other technical issues), they can at least follow the meeting via the webcast platform and eventually have access to the recorded archives of the said meeting.

The webcast platform could also serve as a support channel providing assistance to participants having trouble to connect to the virtual meeting (Business Continuity).

5.10 Security and Confidentiality

Unfortunately, all software may have security loopholes that can be exploited by hackers. Over time new vulnerabilities may also be identified along with new capabilities. Given time, most software companies will fix the code and distribute a patch or software update.

It is important to select web-conference platforms from reputable companies with a proven track record to actively prevent and quickly react to security flaws to ensure the confidentiality of communications over the platform. Look for certifications such as ISO 27001, SOC accreditation, as well as transport and storage encryption note that end-to-end encryption and other capabilities may emerge in the platforms in the future.

Similarly, ensure that the provider subscribes to high data-protection standards with respect to the procession of personal information of the participants on behalf of the Organization. A good indication of these high standards would be compliance with GDPR or other similar regional/national legislation which impose specific data collection, processing and transfer requirements.

Additionally, ensure that the version of the software being used has applied the most recent updates and that the privacy and security settings follow the recommended best practices.

5.11 Technical infrastructure

Most commercial web-conference systems are cloud based solutions, though some may offer the option to have it install it in the customer's own environment. There exist also open-source web conferencing systems that organizations may want to use them to develop their own solution. It is up to the organization to decide which option is most appropriate. Considerations may include integration with the existing event management system, customer relationship system, integration with active directory, accessibility from all Member States, security and privacy concerns, etc.

Furthermore, remote participants need to have the necessary Internet bandwidth and equipment at home to have seamless virtual event experience. The organization can only provide them with guidance in this case. Some companies set up remote hubs in different countries to allow their staff or customers to participate from there, hence ensuring good connectivity and equipment.

Many cloud-based solutions come with different performance options, always go for the top of the range. For on-prem solution, your IT department should be able to assist you.

5.12 Universal design: Cater for persons with disabilities

When choosing a web-conference platform, verify that it has functionality catering for the needs of persons with disabilities. When assessing which of the features to be introduced in your meetings may present a barrier to persons with disabilities, and to introduce "reasonable accommodation" to ensure that meetings are inclusive. In some cases, the participation of persons with disabilities may be anticipated (e.g. expert meetings on issues related with ICT accessibility), however in many cases this won't be the case.

Refer to Annex 4 – Cater for persons with disabilities for further information.

5.13 Virtual Reality exhibition

Events that are exhibition in nature demands a completely different way of thinking. They are very different from classical UN meeting events. Choose an experienced commercial e-Exhibition service provider for a tailor-made solution.

Investigate the best in class virtual reality event platforms that offer capabilities such as conference visualisation, virtual exhibit areas, matchmaking, networking lounges, automated captioning, gamification, leader boards, live polling, surveys and Q&A as well as multiple options for branding, flexible broadcasting/on-demand options, etc. In addition to the exhibition, there may be forum sessions and meetings similar to “standard” ITU meetings, event organizers may consider having that also included in the e-Exhibition service or using other web-conference platforms in parallel.

Ensure that the e-Exhibition platform provides the flexibility for the event coordination team to give visibility to sponsors on the fly, without the need to go back to the platform provider to implement the visibility every time.

5.14 Other useful features

5.14.1 Echo testing for remote participants

Verify that the platform includes feature that allows remote participants to verify if their bandwidth is sufficient for the virtual meeting and has a feature to let remote participants test their audio and replay what they said.

5.14.2 Raise hand and request for floor list

Raise hand to request to speak is an important feature in large meetings. The best practice is the moderator would mute everybody at the start of the meeting and remote participants will click the raise-hand button to request for the floor. The Chairman may choose to first grant the floor to a participant further down the list and the moderator will unmute the participant accordingly.

Verify whether this feature is available and if not, establish meeting procedure to overcome this shortfall. Verify also that the raise-hand button is easily accessible by persons with vision impairments.

5.14.3 Private chat

Practically all web-conference platform provides open and private chat (messages) facilities in the virtual room. Some also provide group chat (messages) and some even include video chats (video calls). It is recommended that conference platform systems should provide moderators adequate control to allow, or limit, group or private chatting.

5.14.4 Breakout rooms

Conceptually this is equivalent to group chat within the virtual room or just leave the current meeting and joining another virtual meeting. Creating a breakout meeting within a running meeting could create a lot of confusion, especially if audio-video is going on in both meetings. For a remote participant, it may be easier to leave a meeting and then joining another one.

5.14.5 Relay, retour and Hand-over functions for interpretation

- Relay is when an interpreter takes sound input from another interpreter instead than from the floor.
- Retour is when an interpreter works into two languages
- Hand-over of channel is required for the interpreters within a language booth. Since interpreters don't see each other, a hand-over function should allow the shift without interpretation overlapping or interruption.
- Develop procedures to handle hand-over functions.

6 Registration, accreditation and access control

(relevant to: Event organizer, IT support)

As far as registration and accreditation is concerned, there is no difference between organizing a physical, fully virtual or hybrid meeting. However, for access control, there is a big difference. For physical meetings, delegates get a badge onsite upon cross checking with valid ID (normally their passport). Security guards then grant them access to the venue either by simple visual identification or aided by badge scanners that are connected to the CRM access control database. The database returns the picture, name and entity of the person giving the green light to enter. The guard matches the picture returned from CRM with the face of the person.

For remote participants, there is no security guard performing this visual inspection, so the authentication of the person requires a more stringent mechanism. A simple password will not be sufficient. Web-conference platforms that support multifactor authentication is highly desirable, especially for Events that demand tight information security.

Some web-conference platforms can be integrated with the organization's Active Directory, allowing staff to connect using their work username/password and delegates using their registered account. Other platforms may only support the staff account and not the other, while others may require remote participants to open an account with them (not related to your organization) that is based on their usual email address. These specific account names need to be collected either during the registration phase, or later when accessing the web-conference platform via the Virtual Event Management Dashboard.

Another mechanism that can be used for tools not integrated in event management system is to configure an Event with a virtual waiting room. The moderator must explicitly allow someone to join the meeting, which can be done manually checking against a list of registered participants.

Alternatively, a moderator may check the participants in a room and expel those that are not authorized to join.

7 Booking of virtual room for committees, subgroups, etc. and updating meeting schedule

(relevant to: Event organizer, Secretary, IT support, Conference Service)

Centralize the virtual room reservation process in *Conference Service* and use a portal to schedule meeting sessions, for both physical meetings and e-Meetings. Depending on the meeting session requirements, the meeting may be held on different web-conference platforms. The portal hides the complexity and ensures the meeting will be held in a virtual room that meet the needs (as stated in the selection of web conference platform section) of the meeting.

For virtual Event with many meetings, create a portal or dashboard that provides a single-entry point to all the meetings related to the specific Event.

8 Virtual Event management dashboard

(relevant to: Event organizer, IT support, Conference Service)

Each web-conference platform will have its own way of handling the authentication and accreditation. Some platforms use the concept of “Virtual Room” while others simply “virtual Meeting”. For the former, the event organizer would book a virtual room, while for the latter, the event organizer would create a virtual meeting. This leads to inconsistency in naming the virtual meetings.

Anybody with a host account on the web-conference platform can create a virtual meeting. Some platforms even offer free host accounts. This can result in complete disorganization and completely unmanageable Events if the organizers create their own virtual meetings without coordination with others.

The creation of virtual meetings should be managed centrally by *Conference Service* through a dashboard that takes account of the business processes. The dashboard hides the complicity and specificity of individual web-conference platforms and provide a standard way for virtual meeting creation, naming and posting on the event website.

The platform can be extended to serve as a workspace for remote participants, to plan their meetings.

9 Virtual room management and guidelines for Chairman, Secretary, Moderator

(relevant to: Event organizer, Chairman, Secretary, Moderator, IT support, AV support, Conference Service)

1. Be familiar with the three roles that are essential to manage a virtual or hybrid meeting:
 - a. **Chairman:** the person who manages the meeting, very often non-staff who may not be familiar with the platform, relies on the secretary and moderator for technical assistance and presenting the documents/agenda in the virtual room
 - b. **Secretary:** the person who assists the chairman in managing the meeting, presenting the documents/agenda, announcing the proceedings or arrangement of the Event, etc. Agree on a way to communicate with the moderator in advance. The secretary could also take the role of the moderator if the person is comfortable doing also that in parallel
 - c. **Moderator:** the person in charge of managing a specific remote participation session. The moderator can start and close a session, start / stop recording of a session, mute/unmute the participants following the order of the chairman, promoting a participant to be a presenter, etc. Agree on a way to communicate with the secretary in advance. The moderator must have a way of contacting IT or AV support.
2. It is good to have a moderator who eases the work of the chairman and secretary particularly for meetings with mainly onsite participants and some remote participants. The moderator allows the chairman and secretary to focus on managing the main physical meeting without overlooking the remote participants.
3. Decide if the meeting is to be recorded (note that webcast has the effect of recording a meeting)
4. It is essential to brief the chairman in advance how the meeting should be managed using the web-conference platform
5. The chairman, secretary and moderator must have a rehearsal beforehand to understand how to handle the meeting logistically
6. Chairman, Secretary and Moderator should connect to the actual meeting well in advance to iron out any last-minute hiccups
7. Recommend that the Chairman and Secretary use two screens. Especially for the chairman, it is good to dedicate one screen to see the list of participants requesting the floor, see the private chat with the secretary and for other supportive activities and use the main screen for the talking to the participants and for the document. This is particularly true when the main screen is the laptop screen, with the camera integrated on top. Like this the chairman will be seen looking at the participants most of the time.
8. It is very important that all support personnel, including the head of interpreters, agree in advance on a method of communicating with each other (e.g. WhatsApp, or private chat within the web-conference platform)
9. Chat is a particularly relevant feature for virtual meetings. For recording the minutes, there needs to be clear guidelines for participants to know how messages on the chat will be

treated. It is important to emphasize that it is an informal form of communication as the Chairman cannot be expected to monitor everything that is being said on the chat while running the meeting and tracking changes on a document.

10. The chairman or secretary should announce clearly when it is break time and when the session will resume. For example, display a presentation slide to show that and share the screen. Moderator should also announce that in the chat. Break time is also a good time for the moderator to iron out any connectivity or technical issues with the remote participants.

9.1 Specific tasks of the chairman

1. Communication is more challenging over a virtual session. The chairman should clearly indicate the decision made and *repeat* it before moving on to make sure all participants are on the same page.
2. In hybrid meetings, the chairman should announce that there are remote participants
3. If interpretation is provided, the chairman should invite participants to make use of it and to speak clearly and at a moderate speed
4. Chairman encourages remote participants to announce their name and affiliation clearly before speaking
5. Advise speakers proposing a substantial amount of text that they type it in the chat, rather than read "in dictation speed".

9.2 Specific tasks of the Secretary

1. When sharing screens, it is better to share the window where the application of interest (e.g. Word or PowerPoint) is displayed.
2. Open a private chat to communicate with the chairman
3. Prepare welcome slide for participants briefly explaining how the platform works

9.3 Specific tasks of the moderator

1. Start the recording if required
2. Agree on an alternate moderator in case the main moderator has connectivity issues
3. Remote participants with low bandwidth / slow connections:
 - Advise participants to turn off their video, which leave the bandwidth for voice, chat, presentation and image of the chairman and active speaker.
 - Advise participants to download all documents e.g. from the website or through the Sync tool prior to the meeting start time.
4. It happens frequently that despite publishing a user guide and inviting participants to read it before joining the meeting, many participants join the meeting for the first time without reading the user guide. Typical difficulties encountered for first-time users (and respective mitigation approaches) are:

- Not being registered to the meeting and therefore not being able to access the sessions.
- Connecting through a non-supported browser
- For web browser-based tools, in case participants encounter a blank page when first connecting, they will probably have an issue with expired cookies. They should empty the cache and simply re-load the page (CTRL+F5) or use the browser in an anonymous browsing mode (e.g. Chrome Incognito window, CTRL-Shift-N), as in this mode no cookies are saved.

Moderator should inform IT service desk who will either resolve the issues or escalate to the appropriate persons

5. The moderator should announce in the public chat any interim break and indicate clearly when the session will resume. Also, the moderator should pause recording, if applicable, during break.
6. Moderator should mute all remote participants and unmute those to whom the chairman gives the floor.
7. Moderator has the right to mute remote participants with bad connections and advise them to reconnect or to use the chat instead.
8. In case the chairman is not following the remote participant request for floor list, the moderator should inform the meeting that one or more remote participants are requesting to intervene, and the chairman would offer the floor to the remote participant as appropriate. The moderator then unmutes the remote participant and notifies the remote participant through the chat to speak.
9. Irrespective whether the e-Meeting ends ahead, on, or beyond the scheduled time, the moderator shall also announce in the chat that the session has ended.
10. Moderator should close the session when the meeting comes to an end, particularly beneficial when the cost of using the platform is on a connection time basis.
11. Moderators should be aware that some platforms require that chats be saved before closing the session, or they may be lost.

10 Virtual service desk support

(relevant to: Event organizer, Moderator, IT support, Remote Participants)

On the *Event* website or “Calendar of Events” page, provide contact information (email, telephone number) of the Service Desk staff to be contacted if remote participants have problems connecting to the web-conference platform or other technical issues.

11 Regulatory and procedural challenges for virtual and hybrid meetings

(relevant to: Event organizer, Conference Service)

Before the Covid-19 pandemic, most UN organizations have never had a fully virtual statutory meeting. For hybrid meetings that are official in nature, remote participants do not enjoy the same

rights as onsite participants. In case of technical problems that disconnect the remote participant, the onsite meeting continues. Remote participants do not have the right to vote and are not considered in the quorum. Furthermore, the following legal and procedural difficulties for providing full remote participation to all have to be considered:

- The rights and legal status of remote participants and chairmen.
- The limitation in terms of formal procedures available to remote participants in comparison with physically present participants.
- Increased accessibility for people with disabilities and specific needs.

It is noteworthy that, as currently in effect, many organizations do not have provisions for enabling neither mixed nor (fully) virtual meetings in its Constitution, Convention, and the General Rules of conferences, assemblies and meetings, as these texts assume that a meeting can only take place between participants who are physically present.

As a general observation, the regulatory and procedural changes that need to take effect in order to fully enable the effective participation of remote participants in virtual meetings will depend on the status and nature of such meetings, since these may not be governed by the same rules and procedures. These changes will have to be approved by the membership as amendments to the existing rules and in accordance with the corresponding procedures.

Unless and until such modifications enter into force, the existing regulatory framework continues to impose limits on remote participation. It is also unfortunate that the Constitution and Convention most probably does not provide for the possibility of deviation from such rules, in case of *force majeure*. However, in the wake of these extraordinary circumstances which may continue to materially impede for a prolonged period the organization of future statutory meetings, the organization of fully virtual meetings could be considered as a possible alternative, as long as the Member States are provided with the opportunity to comment on and agree with such a way forward. To this effect, close coordination with Member States is an essential requirement, as it is incumbent upon the latter to review and approve any exceptional or *ad hoc* measures which may go beyond what is permitted under the current framework for remote participation. This includes deciding on whether a statutory meeting should be indeed allowed to take place virtually, and if so, under which circumstances (e.g. what would be its decision-making authority, if any, and which procedural rules will apply to such meetings, including, but not limited to, exercising of voting-related rights and raising motions of order and points of order). While the modalities of such consultation are dependent on the nature of the meeting itself, the secretariat should generally be prepared to provide the membership the following information:

- a justification on why the meeting needs to be held virtually on the original date (as opposed to its potential postponement to a future date);
- technical information regarding the web-conference platform with information on security, privacy and features, if the membership decides to move ahead with the fully virtual meeting. This information should indicate all potential technical limitations of the platform which may impede the participation rights of the membership, as mentioned under Section 4.5 above (e.g. the platform supports only 300 active participants, so each delegation may only have up to three active participants at a time; use raise-hand to ask for the floor; etc.)
- Logistics arrangements (e.g. registration, working hours)
- Depending on the willingness of the membership to allow the virtual meeting to have decision-making authority, a proposal for the working methods in accordance with which the virtual meeting will be conducted (role of the chairman, applicability/adaptation of specific Sections of the General Rules, allowing decisions only if they are taken by consensus, etc.).

Setting aside the question of applicability of motions of order and points of order (to be decided by the membership under the last bullet point above), the secretariat will need to be ready to provide the technical solutions and contingencies to ensure that each participant maintains a stable connection to the meeting (and the interpretation channels, where available) and that, in case of connectivity problems, the participant is offered additional means of communication to notify the secretariat accordingly. The consequences of such loss of connectivity will have to be decided in advance, potentially with respect to different types of participants (e.g. chairman, secretariat, delegates, heads of delegation, observers).

12 Time management plan

(relevant to: Event organizer, Conference Service)

12.1 Fully virtual meeting could take longer than physical meeting

Fully virtual meetings may take more time to arrive at consensus than physical meetings.

Chairing an e-Meeting is very different experience than a physical meeting. Chairs very often rely on a sixth sense of the room's "feel" of which body language is a crucial part, to do their job. They also need to be able to step in behind-the-scenes to solve problems in a dynamic way. This can be done virtually, but it is more difficult and less informal, given the added friction of technological intermediation.

Negotiations may also be more difficult. It is harder to avoid a compromise when the counterparts are in face-to-face, especially in larger meetings where only a few issues are left to solve. The peer pressure of everyone around the dissenting party wanting to finish is palpable. When negotiating while sitting at home, remaining disagreeable is easier.

12.2 Time zone

For fully virtual meetings involving participants from all Member States presents challenges to deciding the most appropriate time slot to organize a meeting.

There are three possibilities to manage this difference:

- 1) Hold virtual meetings at different hours in a 24-hour period.
The **advantage** of option 1 is that the pain is shared where some delegates may have to join the meeting late at night or very early morning one day, and others would have to do the same other days.
The **disadvantage** of option 1 is that the secretariat and delegates who wish to follow all virtual sessions become exhausted as there is very little time to sleep; also, support may not be available outside Geneva normal working hours.
- 2) Maintain core hours of one time zone, normally Geneva time:
The **advantage** of option 2 is that some delegates must adjust their working hours to match those of say Geneva for the duration of the meeting (5-10 days) but end up having a window of rest equivalent to nighttime in Geneva.

The **disadvantage** of option 2 is that some delegates would have to adjust their working hours and others do not; in addition, TSB support is available during normal Geneva working hours.

- 3) Depart from the traditional approach: So far way physical meetings are held has been replicated in a virtual environment. One underlying assumption has been that virtual meetings will continue to be 8h meetings run over a period of 5-10 consecutive days. However, virtual meetings enable different approaches, for example - using online education as a model: online education has evolved to blend offline and online work, individual work with group work, to make it as easy as possible for anybody from anywhere to follow the same training. Similarly, virtual meetings could be:
 - a. Run over non-consecutive days.
 - b. Combine sessions focused in delegates providing offline comments with shorter 2-3-hour sessions with live interaction from participants. In this case, time zone could be 12:00-15:00 hours (Geneva time), which happens to work for most regions, or alternative different slots to “share the pain” as option 1 proposes. Tools allow for establishing time limits to interventions (as well as limiting number of interventions), ensuring that meetings are run on time.
 - c. Combine audio sessions with chat sessions, offering breakout groups for resolving diverging points-of-view.
 - d. Perhaps the best practice to adopt going forward is to keep the decision-making meetings in a core hours window from e.g. 11:00 to 15:00 (Geneva time). At the time of the meeting, this was equivalent to 06:00 - 10:00 Eastern time in North America; and 19:00 to 23:00 in Far-Eastern Asia. In addition, Question-level meetings could be scheduled from 09:30 to 17:30 Geneva time if necessary, in line with option 2 above.

Consultation with Member States for decision-making sessions may be required irrespective of the decision taken, as normal working hours in Geneva will not be appropriate for a fully virtual meeting with participants from different time-zones.

12.3 Interpreters working hours

If interpreters continue their work in the booths and their work is still based on Geneva working hours, there is no problem. However, working hours may need to be adjusted to accommodate different time zones, *Conference Service* will need to make the necessary arrangements with the interpreters.

To accommodate the needs of globally dispersed meeting attendees, event planners may wish to eliminate the midday lunch break and schedule their meeting in a single block, with short breaks, e.g. between 1100 and 1500 hours (Geneva time). For multilingual meetings, interpretation teams generally require at least a 90-minute break after any three-hour meeting block. A meeting block of more than three hours can be supported, but it would require booking more than one interpretation team to support the meeting.

If interpreters have to work remotely, AIIC has very specific conditions of the work duration (shorter than onsite) that the event planner must take into account.

13 After the Event - Summary, minutes

(relevant to: Event organizer, Moderator, IT support)

1. If the meeting is recorded, it should be provided to the secretary or moderator. For some meetings, it is customary to upload a recording on the public website (e.g. closing study group plenaries), otherwise, it could be provided to the session moderator for reporting purposes
2. Archives of the meeting may be indexed, transcribed, or translated using AI technology
3. Moderator or event IT support to provide the list of remote participants
4. Most tools allow exporting the chat of an Event as a file. Decide on the disposition of the chat file
5. In some cases, it could be interesting to show the carbon savings thanks to holding the meeting virtually.

Annex 1 – DT Network workgroup on Virtual Meeting with Interpretation

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Annex 2 – Guidelines for Remote Participants

(relevant to: Event organizer, Chairman, Secretary, Moderator, Remote Participants, IT support, Conference Service)

1. Remote participants are encouraged to use wired network connection unless the wifi connection has been tested to be reliable and with good throughput. Download the “Speedtest” tool or access <https://www.speedtest.net> and test with the default host (or other network testing tools that can be found easily through Google search) to verify the capacity of your Internet connection.
2. For acceptable virtual meeting experience, the minimum connectivity requirements are:
 - Maximum 50ms ping and maximum 15ms jitter
 - Download/upload minimum 4 Mbit/s.
3. Even if you managed to connect to the virtual Event, it is good to know who to contact in case you encounter connectivity issues during the event. Check the event website in advance on how to contact IT support for the Event.
4. Avoid backlight and sit in a quiet place if you are the presenter or if you’re going to take the floor at some stage.
5. It is always to have two screens when doing remote participation. For the chairman, moderator and secretary having two screens is strongly recommended.
6. Use a headset with earpiece and microphone. Wired connected headsets tend to be more reliable than wireless ones. Positioning of the microphone will affect greatly the quality of sound transmitted; experiment prior to the Event to identify the best configuration. External speakers may create echo; only use them if you are familiar with integrating audio equipment with IT equipment. It is important that you test your setup before the call, including audio input/output hardware, camera and their configuration in the computer or device you will be using to connect to the Event. This is often overlooked by participants and frequent source of problems.
7. Make it a practice to mute your microphone and disable your camera when you’re not presenting.
8. Send your written statement in advance to the interpretation service. Statements are treated as confidential and checked against delivery.
9. Read clearly and at a moderate speed (3 minutes ≈ 1 page)
10. Connect at least five minutes before the start of a meeting. If you’re going to take the floor, connect earlier and make some test with the moderation.
11. Every time you take the floor, identify yourself. If you have not spoken in a while, it is ok to ask for feedback that your voice is getting through (e.g. “Can you hear me?”); allow some time for reaction, as others may need to unmute themselves. When finished, it helps to say “Over!” (or “the floor is open” if you are the chairman).
12. Be prepared to type your question or comment in the chat window, in case your audio intervention cannot be heard clearly by others.

Annex 3 – Cater for persons with disabilities

(relevant to: Event organizer, IT Support, Conference Service)

When designing your session, consider the following points:

- *Information.* Provide clear information in the website of your event on which platform/solution will be used to run your Event. If possible, gather information from the provider on issues related with accessibility of the solution. If you already know that persons with disabilities will join your event privilege solutions that are accessible by design.
- *Registration.* Include a field in your registration form to request participants to indicate in advance if they will require “special accommodation” to participate in the Event, and define the internal process to respond to these requests. Do not raise unrealistic expectations.
- *Enable captioning of meetings.*
 - Many of the platforms available in the market include the possibility of introducing captioning of meetings. This solution may come already included in the platform or may imply an extra cost. If there is an extra cost, consider purchasing it, if meetings have large number of participants or if you already received requests from persons with disabilities via the registration form.
 - Gather information on how the service is provided. If the service is automatic (I.e. provided via AI and speech recognition), be aware that there may be issues with how the service performs with different accents and levels of audio quality.
 - Encourage speakers to speak slowly and articulately, if there are persons with disabilities joining the meeting
 - If platform does not have captioning embedded, you may need to hire the services
- Favour using platforms and arrangements / configurations that have delivered satisfactory results in the past. When using a new platform, organize *various* test sessions, some of them involving persons representative of the target disability group for which accommodations would be provided.
 -

Annex 4 – Check list of issues to be considered when planning a virtual meeting

- Cater to the needs of persons with disabilities (see detailed check list in [Annex 3](#)).
- What is the nature of the meeting?
 - Decision-making process with remote participants:
 - impact on time management
 - how to handle connection issues experienced by the Chairs, remote participants or the interpreters
 - use of public chat room in decision making
 - application/adaptation of General Rules/other rules of procedure during virtual events, subject to acceptance of the membership
 - Non-decisional, informational events and forums:
 - Number of expected active and passive remote connexions, in combination with participants physically present (verify that the chosen platform can support the expected number of remote participants)
- Advance registration and accreditation (to be linked to authentication)
 - closed to ITU membership or portion thereof
 - open to the general public
 - combination of the 2 options above
 - upon invitation only, only open to a restricted group of participants
- Authentication requirements (access control)
 - restrict access to pre-registered participants
 - required authentication level - is authentication using Participant's user account sufficient?
 - linking presence in virtual room to presence in event registration database and produce official list of participants/statistics
- Virtual meeting features
 - identification of participants, affiliation (delegation) and associated rights
 - use of webcam by Chair/Participants
 - raise hand to request the floor (and queue visible to Chair)
 - waiting room
 - screen sharing (impact on bandwidth and on requirement to be "presentable")
 - muting participants (voluntary basis or imposed)
 - use of public chat as part of discussion (e.g. informal surveying of the room replacing body language or nodding from participant, taking room temperature)
 - use of public chat in-between participants or with moderator/Secretary/Chair
 - captioning (human or A.I.)
 - interpretation (from proper booths located in physical meeting room vs remotely)
 - suitability of the platform for persons with disabilities
 - etc.
- Interpretation requirements
 - implications for time management
 - implications for booking of physical room equipped with interpretation booths (vs remote interpretation?)
- Webcast requirements (live and archive), especially for fully virtual meetings

- Scheduling:
 - regular ITU meeting hours (2 x 3 hours) with 90 min. break vs condensed (midday) hours without 90 min. break
 - scheduling meeting sessions with interpretation - advisable to talk to the Chief Interpreter
 - take into account geographical distribution (time zones) of all participants
 - will there be meetings in parallel, and if so which platform smaller or drafting groups should use (same as Plenary meeting?)
- Guidelines, roles and etiquette for different types of participants (written material, videos, etc.):
 - Chairmen
 - Secretaries
 - in-person participants / remote participants
 - moderators (Secretary or Delegate also acting as moderator?)
- Advance test sessions and training for:
 - Chairmen
 - Secretaries
 - remote participants
- Communications
 - information to be provided in advance to participants
 - booking request for a virtual meeting room: self-service vs managed by the Organization
 - announcing virtual meeting sessions
- User support prior to and during event
- Platform usage cost
- Platform can be used by any member
- Archives
 - use of the meeting public chat file and audio/video recording
- Data privacy, security and confidentiality of the chosen platform

Annex 5 - Platforms currently in use / planned

(Status May 2020)

Organization	Statutory	Non-statutory	Internal	Public
FAO	Evaluating Interprefy and Kudo Polycom H.323 Zoom	Zoom, Teams, Adobe Connect Evaluating Pexip, Poly (on hold)	Zoom, Teams, SfB (retiring 2020), Adobe Connect	Polycom H.323, SfB, Teams, Zoom, Adobe Connect
IAEA	Interprefy (for June BoG, TBD thereafter)	Webex, TBD for multilingual	Teams, Webex, SfB (retiring end 2020)	Teams, Webex
ICAO	Evaluating Zoom	Evaluating Zoom	Teams, Skype for Business, Zoom	Zoom
IMO	Evaluation ongoing	Teams/teams Live Event	Teams/Teams Live Event	Teams/Teams Live events
IOM	Evaluating Interprefy and Kudo	Teams/Blue Jeans	Teams/Blue Jeans	Teams/Blue Jeans
ITU	Interprefy	Interprefy Big Blue Button GoToMeeting Teams	Teams	Zoom
UNHQ	Kudo / Interprefy / Interact.io currently being evaluated	Teams	Teams	Teams Live Events
UN Women		Zoom	Teams	Zoom
UNESCO	Interprefy	Teams (Live) Zoom Interprefy	Teams	Zoom
UNDP	MS Teams Skype for Business Zoom Polycom Video Bridge		Teams Zoom Skype For Business Polycom Video Bridge	Zoom Skype Broadcast MS Teams Live Polycom Video Bridge
UNHCR	Evaluating Interprefy	Teams Teams (Live) Webex Evaluating Interprefy	Teams Webex	Teams Webex
UNICEF	ZOOM	ZOOM S4B Teams	ZOOM S4B Teams	ZOOM S4B

UNOG	Kudo / Interprefy / Interact.io currently being evaluated	MS Teams Webex VTC Kudo / Interprefy / Interact.io currently being evaluated	MS Teams Skype 4 business Webex Jabber VTC	MS Teams Live Events Zoom (exceptionally when no other option available) Kudo / Interprefy / Interact.io currently being evaluated
UNOV	[Currently being evaluated (Kudo/Interprefy/Interactio)]	[Currently being evaluated (Kudo/Interprefy/Interactio)] Teams	Teams Skype for B. Jabber VTC	[Currently being evaluated (Kudo/Interprefy/Interactio)] Teams
UNRWA	Teams Zoom (limited) Considering (Interprefy/Kudo/Interactio)	Teams Zoom (limited) Considering (Interprefy/Kudo/Interactio)	Teams	-
WHO	Interprefy to be used in May	Under evaluation	Teams (team/workgroup level) Webex (larger meetings)	Zoom
WIPO	Interprefy and Kudo	Interprefy and Kudo GoToWebinar Webex Skype For Business (replace with Teams soon)	Skype For Business (replace with Teams soon)	GoToWebinar Webex Teams/Live event soon Nb. Multi media studio may be used
WMO	BlueJeans, Teams, Kudo	BlueJeans, Teams, Kudo	BlueJeans, Teams	BlueJeans, Teams
WTO		Teams WebEx Skype VTC Zoom (exceptionally when no other option available)	Teams Skype Zoom (exceptionally when no other option available)	Teams WebEx Zoom (mainly for webinars)
UNEP		Webex	MS Teams (for adhoc and	Webex

		GoToWebinar	scheduled group meetings) Webex (for larger meetings) Teams Live Events (for Townhall sessions)	GoToMeeting GoToWebinar
UPU		Adobe-connect (Local interpreters)	Teams, WebEx	Teams, WebEx