

# POERUP

## Policies for OER Uptake

Progress Report

Public Part

## Project information

Project acronym: POERUP  
Project title: Policies for OER Uptake  
Project number: 519138-LLP-1-2011-1-UK-KA3-KA3MP-POERUP  
Sub-programme or KA: KA3  
Project websites: <http://www.poerup.info> and <http://poerup.referata.com>

Reporting period: From 01/11/2011  
To 31/01/2013

Report version: 1

Date of preparation: 28 February 2013

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This project has been funded with support from the European Commission.

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## Executive Summary

1. POERUP's overall aim is to develop *policies* to promote the uptake of OER (Open Educational Resources) in the educational sector, not for their own sake but to further the range of purposes for which institutions deploy OER: wider access (including internationally and in particular from developing countries), higher quality or lower cost of teaching – and combinations of these.
2. POERUP is focussing largely on the universities and schools subsectors of the education sector, but is also paying attention to the non-tertiary post-secondary subsector – the 'colleges' – since they are often the loci of the kind of informal learning that OER facilitates and also crucial to skills development.
3. The original focus of POERUP was to focus on policies at the 'national' level (including governments of devolved administrations). However, in the increasingly regionalised and part-privatised environment for education, where some governments are actually withdrawing from setting ICT policies for their sectors, it is now felt more appropriate to focus also on policies for institutions, consortia of these and private sector actors who facilitate change.
4. POERUP is putting substantial effort into understanding the state of play of OER in a range of countries, within the policy context in these countries, and as part of the wider development of online learning in these countries – but cognisant also of the worldwide moves towards Open Access for research literature.
5. Indeed, POERUP is a project in the discipline of **comparative education**. Any such project carrying out comparative education has to *prioritise* and then *tier*. POERUP had to decide which countries were relevant to Europe and within the set of relevant countries decide which countries would be studied thoroughly by partners and which in a less thorough way, either by contracted experts paid by POERUP or via third parties not paid from POERUP funds.
6. The countries POERUP has studied come not only from Europe – in fact with some notable exceptions (including UK, Spain and France) many European countries are not yet very active in OER. There is of course much activity in the US but it is so easy to spend (some might say waste) effort on meticulous documentation of the complex and ever-changing US situation so we have so far studied the highlights in the US but kept away from too much detail. Thus outside Europe we focus more on countries with linguistic, cultural or political links to countries in Europe including non-European OECD members and the BRIC nations: such countries as Canada, South Africa, Australia, Mexico and Argentina.
7. The kind of global study that POERUP is doing is expensive and *potentially* infeasible within typical LLP budgets – thus POERUP has been particularly concerned to provide value for money to the EU. A key strategy to achieve this is to partner informally with the other projects and agencies (inside and outside the EU) to ensure that POERUP does not carry out any country studies which are already being done by other agencies. This has been time-consuming and has led to some minor project delays (no more than couple of

months) while other agencies carried out their processes, and has produced a possibly fragmentary-looking set of country studies *if judged in isolation*, but the financial benefit of avoiding unnecessary country studies is substantial and indeed the only way that POERUP could have proceeded. There are many positive outcomes of the consultation process including good collaboration with IPTS, UNESCO IITE Moscow, OER U/ WikiEducator, CommOER/ Wikipedia and OER Asia, as well as with several independent experts. This has largely taken the place of and obviated the need for a formal International Advisory Committee in the first phase of the project, but has also led to an enriched set of IAC members for the second phase.

8. The first round of **country studies** is essentially complete and now POERUP is turning its attention to a more delicate level of analysis. The key to this is to understand the ways in which *OER communities* can develop and foster activity without sustained long-term amounts of government funding. Particular tools for Social Network Analysis will be used to achieve this.
9. Seven case studies for **OER communities** have been chosen across the various education sectors for analysis by POERUP partners. These include the schools-focussed projects Wikiwijs (Netherlands), Bookinprogress (Italy) and Hwb (Wales/UK); HE-focussed projects OER U, Futurelearn (UK) and Canadian OER HE community; and one MOOC-based project to cover informal adult learning.
10. Although POERUP was not scheduled to start detailed **policy formulation** until the second half of the project, the requirements from EU entities (including IPTS and Open Education Experts Group), UNESCO and some national governments have meant that policy work in fact started in summer 2012 and was demonstrated in a multi-project OER workshop in November 2012 just before Online Educa Berlin.
11. POERUP practitioners are reflective practitioners and with the support of an evaluator have co-developed a **formative evaluation report**.
12. **Future plans** are well developed and have taken account of the progress in the first phase of the project (15 months) and the opportunities gained from wider partnering.

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# 1. Project Objectives

The overall aim of POERUP is to carry out research to understand how governments can stimulate the uptake of OER by policy means, not excluding financial means but recognising that in the current economic situation in Europe the scope for government financial support for such activities is much less than it has been in some countries.

We do not want to formulate policies based on informal discussions. We want the policies to be *evidence-based policies* – and based on looking *beyond* – beyond one's own country, region or continent, and beyond the educational sector that a ministry typically looks after.

One aspect of this is to foster the potential of new technologies for enhancing *innovation and creativity*, in particular by researching policies designed to foster a *lifelong learner mindset* in learners – leading to curiosity, creativity and a greater willingness to *consume* OER.

We also want to provide education authorities, the research community and OER initiative management with *trustworthy* and *balanced* research results, in which feedback from all stakeholder groups has been incorporated and which can be used as standard literature. A specific objective is to help readers in charge of OER initiatives to foresee hidden traps and to find ways of incorporating successful features of other initiatives. POERUP is about dispassionate analysis, not lobbying.

We aim to provide policymakers and education authorities *above institutions*, but also OER management and practitioners *within institutions*, with insight into what has been done in this area, plus a categorization of the different major initiatives and the diverse range of providers. Policy advice is needed explicitly to address Issues like critical thinking in the use of new technologies/media, risk awareness, and ethical/legal considerations. Our review will provide practical and concrete information in order to contribute towards a more informed approach in the future.

POERUP is doing this by:

- studying a range of countries in Europe and seen as relevant to Europe, in order to understand what OER is going on, and why it is going on (or might soon cease to be going on) – and taking account of reports from other agencies studying OER in other countries;
- researching case studies of various *end-user–producer communities* behind OER initiatives in order to refine and elaborate recommendations to formulate a set of action points that can be applied to ensuring the realisation of successful, lively and sustainable OER communities;
- developing informed ideas on policy formulation using evidence from our own and other studies, our own experience in related projects and ongoing advice from other experts in the field.

Finally, these results are being disseminated and maintained in a sustainable way. The project has a web site <http://www.poerup.info> and a wiki <http://poerup.referata.com> on which country reports and other outputs are being developed. This wiki will be sustained well after the formal end of the project, as OER, under an appropriate license.

## 2. Project Approach

### *Country studies*

The main ‘intellectual’ task in the first half of the POERUP project was to decide on which countries should be studied in depth for their uses of OER and the contexts surrounding such uses. The project plan had pre-specified some countries, but it is always a good plan when a project starts to recheck one’s assumptions in a bid submitted nine months earlier. Having discussed the matter, the partners decided not to change the main countries studied, or to reallocate any country responsibilities between partners. This led to the following 11 countries being studied by teams at the partners:

<i>Within EU/EEA</i>	<i>Outside EU/EEA</i>
1. Belgium	8. Canada
2. France	9. United States
3. Hungary	10. Australia
4. Italy	11. New Zealand
5. Netherlands	
6. Poland	
7. United Kingdom	

However, the plan also required partners to contract out studies for a further 13 countries to external consultants. It was more of a challenge to decide finally on these countries, even given the proposals in the bid. Firstly, the ‘low-hanging fruit’ – countries with obvious OER – had already been plucked, thanks to pre-bid researches – which in the case of POERUP were substantial (for several reasons). Secondly, an early study to determine who across Europe could be called ‘an expert in OER’ suitable to be invited to the POERUP International Advisory Committee had produced strong indications that many European countries were not very active in OER. Thirdly (and finally), we had made contact with other projects and agencies – including UNESCO, IITE Moscow and OER Asia – and it was clear that some of them were commissioning country studies before POERUP even had started. We rapidly decided with them that it would be a foolish waste of resources to duplicate studies but since their plans were further ahead we had to do a gap analysis to see what countries were left. Fortunately for European coherence the majority of potential duplicates were outside the EU and the situation was resolved amicably. So in September 2012 we eventually commissioned, via three of our partners, three sets of studies – at a cost of around €2000 per study. These were as follows:

<i>Within EU/EEA (EDEN and SCIENTER)</i>	<i>Outside EU/EEA (Sero)</i>
1. Denmark	9. Argentina (South America)
2. Finland	10. Gulf States (Middle East, 5 small countries)
3. Greece	11. Mexico (Central America)
4. Norway (EEA)	12. South Africa
5. Portugal	13. Thailand (Asia)
6. Romania	
7. Spain	
8. Sweden	

For an example of one of the three tenders – full open global tenders – see [http://poerup.referata.com/wiki/OER\\_studies\\_for\\_non-EU\\_countries](http://poerup.referata.com/wiki/OER_studies_for_non-EU_countries).

It may be a comment on the modest fee we offered (though it is not out of line with what other projects were offering for similar studies), or further evidence of the lack of OER experts in and on these various countries, but it is fair to say that we were not overburdened with responses to these tenders, despite an open call distributed via the wiki, via our networks and via the standard OER email lists, blogs and tweets.

This was not a problem for the EU/EEA countries. However, for the non-Europe studies, with the exception of one country (South Africa), we had *no valid tenders at all*. It did not help that under EU rules for such tenders, any contractor had to have the right to work in the EU – but given the number of education researchers with such rights, we were surprised. In the end, with careful re-tendering and ‘working our contacts’, we did find good contractors for all the studies, but in some cases this introduced two months’ delay. The results of the country studies are described in the next section.

### *Case studies*

The first round of country studies is essentially complete (with two countries in the Gulf States left to do) and as it enters the second half of the project, POERUP is turning its attention to a more delicate level of analysis. The key to this is to understand the ways in which *OER communities* can develop and foster activity without sustained long-term government funding. Particular tools for Social Network Analysis will be used in these case studies.

After analysing the country reports and checking a longer list of possibilities against partners’ competences, locations and language skills, we selected seven case studies for OER communities across the various education sectors. These include the schools-focussed projects Wikiwijs (Netherlands), Bookinprogress (Italy) and Hwb (Wales/UK); HE-focussed projects OER U, Futurelearn (UK) and Canadian OER HE community; but also one MOOC-based project to cover informal adult learning. Pen-pictures of these are in the next section.

### *Policy formulation*

Although POERUP was not scheduled to start detailed policy formulation until the second half of the project, the requirements from EU entities (including IPTS and Open Education Experts Group), UNESCO and some national governments required that policy work in fact had to start in summer 2012. In fact an early cut at our policy work was demonstrated in a multi-project OER workshop just before Online Educa Berlin in November 2012 – <http://www.slideshare.net/pbacsich/oeb-oerwspoerupbacsich> – and in some position papers to DG EAC and external reports.

### *Dissemination and exploitation*

Dissemination started really early in the project’s lifetime – in fact the POERUP wiki was running even before the bid was submitted and the first page with content on it appeared four days after bid submission [http://poerup.referata.com/w/index.php?title=Main\\_Page&oldid=2](http://poerup.referata.com/w/index.php?title=Main_Page&oldid=2).

Two months after the project formally started there was a leaflet produced for the EU Coordinators meeting in mid February 2012, and by March 2012 a systematic process of presentations at conferences had started. Furthermore, by this time the project had consolidated the pre-bid research and other OER-related work in the

interregnum (between bid submission and project start – projects such as LEOERL, [http://leoerl.referata.com/wiki/Main\\_Page](http://leoerl.referata.com/wiki/Main_Page)) so that non-trivial results could be disseminated, unusual for a project that early in its life. It also helped that there are three globetrotting professors among the partners and other staff who receive many invitations to conferences across the world. Notwithstanding, it was not until autumn 2012 that presentations began to take on a deeply researched aspect.

A large number of more informal opportunities were taken to discuss the project with opinion-formers in several EU countries – and beyond the EU – in Canada, Australia and New Zealand in particular. The EU countries were not neglected but in some EU countries ministries are not currently particularly receptive to new ICT-based developments that may cost money in early phases even if there are longer-term benefits later. POERUP – and similar projects – still have much work to do on effective policy formulation, including ‘hearts and minds’ consultations with policy advisors.

### *Evaluation*

POERUP practitioners are reflective practitioners and with the evaluator have co-developed a formative evaluation report for the first phase. POERUP has an excellent evaluator and in particular before and during the second POERUP partner meeting (Granada, September 2012) a systematic review was done by the evaluator with all partners.

### *Project management*

The POERUP project is quite long (2.5 years) and this means that the typical pattern of four project meetings in an LLP project is quite widely spaced. There was a project meeting within two weeks of the project start (Leicester, mid November 2011) and then a second one in September 2012 (Granada). The third one is taking place at the end of March 2013, just before the OER13 conference – <http://www.ucl.ac.uk/oer13/> – of which POERUP is a sponsor, and with a significant track of its own in the OER13 programme. There will be a supplementary project meeting on policy aspects at the EDEN Oslo conference in June 2013.

In between project meetings there have been a number of online meetings, with a particularly significant and lengthy one in June 2012 – and there are likely to be one or two more such lengthy online meetings. In addition, key POERUP staff meet regularly at the main e-learning conferences in Europe, especially EDEN and Online Educa each year, in June and November/December respectively.

### 3. Project Outcomes & Results

#### *Country reports*

Of the 26 country studies done (including 3 of the 5 Gulf States), all are mounted on or linked from the POERUP wiki. In most cases, such as Poland, the country OER study goes under the same name – thus <http://poerup.referata.com/wiki/Poland> – but in a few cases, it was more efficient to link the existing country page to a wiki page such as [http://poerup.referata.com/wiki/OER\\_in\\_Mexico](http://poerup.referata.com/wiki/OER_in_Mexico) or a PDF report such as [http://poerup.referata.com/w/images/OER\\_in\\_Argentina.pdf](http://poerup.referata.com/w/images/OER_in_Argentina.pdf).

Project staff and consultants were first tasked to check the relevant country page on the VISCED wiki so that they did not duplicate effort. In some ways it would have been more efficient if they had updated the VISCED country page *in situ* – however, during the key period for doing POERUP country reports (March-September 2012) many of the same country reports were being updated by VISCED staff as VISCED drew to a close (it ended on 31 December 2012) – and it was felt that to have a clash of updating teams would both be unwise and also cause difficulties when it came to the evaluation of VISCED since it would be unclear as to which contribution was from which project. In one case, Thailand, this was done, because Thailand was not a target country for VISCED – and the results have been encouraging. It provides a much more integrated approach – <http://virtualcampuses.eu/index.php/Thailand> – which we feel is a key pointer to how pages can be developed from summer 2013 on.

Among the non-EU countries – which suffered delays because of the lack of response to the initial public tender – there are reports for Argentina and two of the Gulf States (Oman and Qatar) which are in PDF format. Two countries in the Gulf States (Bahrain and United Arab Emirates) are still to be finished. (It proved impossible in practice to treat the Gulf States as one entity.) All country reports will be on the wiki in wiki format by April 2013.

The full set of country pages is still in progress of being analysed for OER initiatives. At the time of writing, the Gazetteer of OER initiatives (Deliverable 2.1 Interim) contains 229 explicitly marked entries – but there are many UK and Spain entries not yet tagged and the US entries tagged – the *Notable* ones – are a small subset of all the US OER initiatives. There are certainly at least 300 OER initiatives in the current Gazetteer and by the time all the current non-European country pages are incorporated in the Gazetteer there will be over 350 entries.

At OER13, Ming Nie of the University of Leicester will present key findings from the project including a first public analysis of the OER initiatives that the project has found – her presentation is summarised at <https://www.medev.ac.uk/oer13/47/view/>.

Initial conclusions include the following:

- The volume of OER activity in a country is not closely correlated with GNP or other obvious factors – similar size countries such as UK, Spain, France, Germany and Poland have very different amounts of OER and numbers of initiatives.
- Some countries, especially in the Commonwealth of Nations, which are otherwise advanced in the use of ICT in education, are in fact much less developed in their involvement in OER.

- Several countries have a lot of OER activity but only from one or a handful of organisations – often open universities or elite universities.
- There is a continuum between OER and Open Access – particularly evident in postgraduate study where journals are required reading for students – but in general it is very hard to draw the line: different countries take different views.

The studies also validate the project's decision early on to take a 'broad' view of OER – if a purist view of OER is taken, it is easy to miss developments, e.g. in university or schools repositories, which can be 'made into OER' at the touch of a button by switching off access controls. It is useful and reassuring that other analyst teams, such as UNESCO IITE Moscow, have also tended to take a broad view when commissioning country studies.

### *Case studies*

The POERUP project is required to carry out seven case studies of OER communities. These have been chosen and pen pictures follow:

1. Wikiwijs (Netherlands) is an open, internet-based platform, where teachers can find, download, (further) develop and share educational resources. The whole project is based on open source software, open content and open standards. Wikiwijs is inspired by the idea of wikis: collaborative developing of content. Educational resources are developed by teachers, for teachers. Teachers can freely use anything they find in the Wikiwijs database in their classrooms. The scope of Wikiwijs is the whole Dutch educational system: from primary schools up to the universities.
2. Bookinprogress (Italy) is based on a network of 800 teachers who create common books in several subjects (Italian language, history, geography, chemistry, English, physics etc.) which are then printed in the different schools adhering to the network. The books are then distributed for a rather low price to students and can be also distributed in digital versions.
3. Hwb (Wales) is a new digital learning platform for Wales, which provides a space for teachers and educators to share and access a range of digital tools and resources which will support the learning of all 3-19 year olds in Wales. It is a bilingual virtual learning environment. There is public access to all Hwb content which includes all of the NGfL Cymru content (formerly not available to the public).
4. The Open Educational Resource University – OER U – is a virtual collaboration of 22 like-minded universities and some other institutions committed to creating flexible pathways for OER learners to gain formal academic credit. It aims to provide free learning to all students worldwide, using OER learning materials with pathways to gain credible qualifications from recognised education institutions. It aims to develop a parallel learning universe to augment and add value to traditional delivery systems in post-secondary education. Through the community service mission of participating institutions we will open pathways for OER learners to earn formal academic credit and pay reduced fees for assessment and credit.
5. Futurelearn aims to bring together a range of free, open, online courses from leading UK universities, in the same place and under the same brand. There are now 18 partners including the UK Open University, 16 other universities

and the British Library. The stated aims are to bring together a range of free, open, online courses from leading UK universities, that will be clear, simple to use and accessible; drawing on the UKOU's expertise in delivering distance learning and pioneering open education resources to underpin a unified, coherent offer from all of its partners; and increase accessibility to higher education (HE) for students across the UK and in the rest of the world.

6. The Canadian OER community is described in the report [http://poerup.referata.com/wiki/Overview\\_of\\_Open\\_Educational\\_Resources\\_Policies\\_in\\_Canadian\\_Institutions\\_and\\_Governments](http://poerup.referata.com/wiki/Overview_of_Open_Educational_Resources_Policies_in_Canadian_Institutions_and_Governments).
7. There is finally a case study of a MOOC community.

#### *Policy recommendations*

For various reasons the POERUP project was propelled into the policy area much earlier than originally planned (the second half of the project). First, in April 2012 it became clear that the UNESCO OER meeting in Paris in June 2012 was going ahead and was inviting experts (not only politicians) to attend – and some to speak. Representatives from Sero, Athabasca, Dutch Ou and SCIENTER were approved to attend, taking along and distributing POERUP leaflets, and meeting the other OER analytic projects active round the world, all at minimal cost. The Paris meeting was of course best known for the release of the Declaration – approved on 22 June – and by 6 July a version of this, appropriate for benchmarking countries' progress towards OER, was released on the POERUP wiki –

[http://poerup.referata.com/wiki/2012\\_Paris\\_OER\\_Declaration\\_as\\_benchmark](http://poerup.referata.com/wiki/2012_Paris_OER_Declaration_as_benchmark).

Secondly, the European Commission in spring 2012 had issued invitations to various experts, including some from POERUP partners – Sero, Dutch Ou, EDEN and SCIENTER – to join a new Open Education Experts Group – and solicited input. A vast amount of inputs and position papers were produced, of which some were released later via the *elearningeuropa* portal. In particular Paul Bacsich had prepared a paper *Suggestions on ten meta-principles for interventions* aimed at providing a methodological framework for policy recommendations, based on research in POERUP, VISCED and other EU projects. Among the POERUP-specific points it made (out of an original 10) were the following (slightly abbreviated):

- a. Many policy aspects recently regarded as 'standard operating procedure' in advanced countries are no longer standard. Several EU countries have no policy for ICT in education. **Policy templates** for member states may help.
- b. The statist model of education is long gone in Europe. Private providers are active even in the value chain from state to student (Sweden, UK). Fees or pseudo-fees are being charged. Private universities exist, and private schools and colleges. *More analysis of national approaches is needed. Private partners are needed for public projects.*
- c. Other international agencies are now studying countries in Europe (UNESCO, IITE, OECD, COL). This is why **POERUP** partnered with Athabasca University. *Wider collaboration is needed at EU level and in projects.*
- d. Quality agencies are deliberately set up to be autonomous from both government and universities. ICT-based learning in general and open learning in particular are minority developments in all EU countries; quality agencies focus on the mainstream. (**ENQA** seminar.) Few countries have quality standards for ICT-based learning, fewer still use the ones they have (Sweden, New Zealand). Even fewer staff use them (UK). *We should stop complaining about agencies and trying*

*to work without them, but work **with** them – they will be interested when open education becomes a significant activity. In the short term we should ensure that the general quality guidelines do not discriminate implicitly against open learning.*

Point c in particular has had a significant effect on what countries POERUP studied. Points b and d have had an effect on what topics within countries were studied.

Coupled with the policy work in VISCED this policy strand led up to a presentation *Enabling legislation to support OEP: a realistic view from POERUP* to a multi-project workshop on OER at Online Educa – see <http://www.slideshare.net/pbacsich/oeb-oerwspoerupbacsich>.

The presentation contended that policy interventions for OER need to be made now at all levels of a 9-tier hierarchy of intervention levels, given an increasingly devolved, fragmented and part-privatised educational scene – the levels being from the top:

1. Global: UNESCO Paris Declaration on OER
2. EU policies, especially now Rethinking Education
3. National policies (not many of these yet)
4. Sub-national policies (home nations, Länder, autonomous communities, provinces, states)
5. Municipal/county/regional policies
6. Groupings of institutions
7. My Institution
8. My Department
9. My Course!!

The presentation then went one by one through the recommendations from the VISCED (Virtual Schools/Colleges) project, treating these as ‘reusable policy objects’ for use in an OER policy framework. For example, VISCED Recommendation 1 that “The Commission should remove any unnecessary bureaucratic impediments which inhibit the development and sustainability of *virtual schools and colleges*” translates rather easily into one on OER when OER replaces the italicised phrase. Only a few do not translate well, which in itself raises questions about some proposals from OER enthusiasts.

### *Dissemination*

There have been over 20 presentations at events, mainly international ones, where POERUP has been presented or featured in a significant way. Thus the project is getting well known. Here we highlight three presentations which featured substantial analytical conclusions from the project – these began to appear from summer 2012.

1. Professors Grainne Conole and Rory McGreal presented POERUP at the EFQUEL Innovation Forum, Granada, 6 September 2012 – <http://www.scoop.it/t/efquel-innovation-forum-2012/p/2637646411/poerup-slides-for-grainne-conole-s-double-act-with-rory-mcgreal-at-eif2012> – in particular they drew conclusions from the UK country study and the first general conclusions on how OER initiatives differ in quantity and style between developed countries.
2. At the same event Paul Bacsich presented his early thoughts on *Alternative models of formal education delivery* – <http://www.scoop.it/t/efquel-innovation-forum-2012/p/2612219194/alternative-models-of-formal-education-delivery>

[paul-bacsich](#) – one model, the *OER College*, drew directly on POERUP research on feasible models including aspects of quality and assessment.

3. Gabi Witthaus, Ming Nie and Professor Grainne Conole presented *EmpOERing students and academics through large-scale open content initiatives* at the EDEN Research Workshop, Leuven, 22 October 2012, in the context of a presentation – <http://www.slideshare.net/witthaus/poerup-presentation-for-eden-22-oct-2012> – followed by a workshop: this developed the earlier EFQUEL presentation into more specific conclusions drawn from the European country case studies then emerging.

In addition a number of papers and reports were produced, mentioned earlier in the subsection on policy. It is a little early for project work *originated* in POERUP to work through into book chapters and research journals but some work *amplified and enhanced* by POERUP has begun to do so, for example a book chapter by Paul Bacsich and Giles Pepler, *Learner Use of Online Content: implications for teachers*, was submitted in December 2012 to a forthcoming book *Teaching and Learning Online: New pedagogies for new technologies* to be published by Routledge in 2013.

#### *Exploitation*

POERUP partners in UK, France, Netherlands and Canada have been active in maintaining and enhancing their existing links with policy advisors and policy makers. In the UK Sero has paid particular attention to contacts in the Devolved Administrations of Wales and Scotland – e.g. one case study is from Wales. In addition via connections in New Zealand, Australia and Sweden through related projects a wider range of policy advisors were consulted without incurring travel costs borne by the POERUP project.

There is a considerable overlap between OER policy issues and e-learning policy issues. In particular this meant that POERUP benefited from the Advisory Committee set up for the Virtual Schools and Colleges Project (VISCED) which last met just before Online Educa 2012 in November. Online Educa also allowed a rehearsal of a new style of Advisory Committee – a multi-project team of OER presenters. The first formal Advisory Committee meeting for POERUP will take place at OER13 in Nottingham in late March, followed in three months by one at the EDEN conference, Oslo, June 2013 and finally one just before Online Educa Berlin, November 2013.

#### *Evaluation*

The evaluator Deborah Arnold in her formative evaluation (Deliverable 7.2) made many useful observations. In particular she noted that

...the main activities planned have been carried out, although certain adjustments have been necessary in order to remain consistent with adjustments in the project activities themselves.

The challenge is thus to help the project remain on track while accepting that external factors may mean that the project needs to reassess its focus from time to time.

This has been the case with some of the externalised country reports, for example, where other studies were seen to be covering similar ground [requiring a change of country studied], and with the refocus of the workshops from national events linked to partner meetings to events integrated within international conferences.

## 4. Partnerships

### *Within the consortium*

POERUP contains only seven partners – but coming from five countries: four across Europe (UK, France, Italy, Netherlands and Hungary) as well as Canada. Countries cover large- and medium-population ones and five EU languages. Their political systems are different – and fluid. For three (UK, Italy and Canada), education is devolved to semi-autonomous regions, some (like Scotland and Wales) being typical in size for small European countries; for the others, education is organised centrally. This allows POERUP to gain a range of perspectives on educational issues.

The partners come from different parts of the educational and institutional universe. There are four universities, two research-based SMEs/small foundations (Sero and SCIENTER) and one network/membership organisation (EDEN).

Staff within the partners comprise university professors/academics, consultants, and business people – one is a former employee of a Ministry of Education who had a key role for e-learning. Many of the staff have or had university-age and school-age children – so for them education is not just a theoretical construct.

Several partners have worked together in the past (e.g. Sero and SCIENTER on VISCED – <http://www.virtualschoolsandcolleges.info>); others are currently working together on other projects (e.g. Sero and EDEN on ODS: Open Discovery Space – <http://www.opendiscovery.space.eu>).

### *With other projects*

POERUP has formed close links with IPTS, UNESCO IITE Moscow, WikiEducator, and CommOER (from WikiMedia, funded by the Hewlett Foundation). The collaboration with these and other entities has already been crucial to minimise the duplication of country studies – and consequential potential waste of public money – between agencies. Work with IITE Moscow led to the fruitful “archetypes” paper. CommOER and POERUP are mounting a joint session at OER13. Paul Bacsich is on the Advisory Committee to the IPTS-funded project OER4Adults (<http://oer4adults.org/advisory-group/>), closing another gap since POERUP is not mandated to research OER in adult education.

### *International Advisory Committee*

Based on existing OER contacts and previous projects, a long list of Advisory Committee names has been generated and appropriate ones from this have been invited to the first Advisory Committee meeting, which takes place on the second day of the OER13 conference in March 2013 in Nottingham.

### *Outreach to the world beyond Europe*

The project’s Canadian partner has two professors Rory McGreal and Terry Anderson, active in OER and e-learning and with a substantial programme of international keynotes on OER-related topics. Within Europe Paul Bacsich and Professor Grainne Conole also give many international speeches and have in 2012 been on study trips in New Zealand and Australia respectively, as well as shorter trips to US and India, on all of which they have met OER experts and policy advisors. This outreach includes links to private providers and venture funds.

## 5. Plans for the Future

The following is a description of the plans for the future – in other words, the second half of the project (1 February 2013 until 30 April 2014 inclusive, noting that at the time of writing this report, February is about to finish).

### *Country studies*

By the end of 2013 it is likely that several country studies will need a major update. It is more likely that those completed earlier in the project (such as the UK) will need more updating than those done recently (such as Argentina). It is also likely that some countries in reasonable economic shape (Australia or perhaps Canada) will finally 'get' OER at a national level and activity will rapidly increase from its current low level, necessitating a revised edition. For others this is less likely – though New Zealand is worth watching to see if OER breaks out beyond the OER U members.

In the immediate future there is a need both to consolidate what we have done so far, in particular to identify the key initiatives, and to analyse the set of country reports now available from other agencies including UNESCO IITE and OER Asia – and to see if country reports arise from Oportunidad – <http://oportunidadproject.eu>. It is quite likely that some gaps will be identified even taking into account the other projects. There is not the budget in POERUP to do much more work on country reports but it may be that by joint working and use of volunteers (as in VISCED) some further progress can be made. (Such a volunteer has done the POERUP report on Kuwait.)

There is a particular issue with the United States. The report on the US was done early in the project (completed by April 2012) and focussed purely on a selection of 'notable' initiatives. This was to avoid the project budget being distorted by the demands of doing a comprehensive study. (Those not familiar with similar study projects – VISCED, Re.ViCa and many earlier studies for UK agencies – may not realise that this is a common challenge with the US – one cannot ignore it but one cannot afford to study it in full detail.) Consultation with experts on the US OER scene has made it clear that POERUP needs to do an update in the next few months, soon enough that the policy implications of the new business models and policy interventions in the US can be fed into WP4 work, so before the autumn of 2013. This study is likely to concentrate mainly on schools-focussed interventions (especially state-wide free textbook initiatives) – but also on venture-funded models, as it is not unlikely in the next few months that the financial or perhaps regulatory weaknesses of some of the models will become evident – and this would be a vital lesson for Europe to learn given the renewed interest, in some countries, in private-public partnerships and 'freemium' models. All of this will also feed into the taxonomic work – almost by definition the US contains examples of almost every kind of intervention – and not only just in the English language – such as Ameritas College (though not an OER example, yet – <http://ameritas.brandman.edu>).

### *Case studies*

These have been well summarised in Section 3. The aim is to complete these by July 2013. We have already one additional case study (on an OER virtual school) that could be deployed and three others have sufficient flexibility of scope (Hwb, Futurelearn and the MOOC study) to survive all but existential threats. The others seem stable, as 'stable' goes in the OER world. Thus the risks are contained.

### *Policy formulation*

In many ways this is the crucial set of tasks in the second half of the project. We see no reason to change the general approach of the work plan, but some change of emphasis. General policy advice will come in three reports under the one overall editor with the aim being to have initial drafts by summer 2013:

1. advice for those overseeing networks of schools
2. advice for those overseeing networks of universities
3. advice for those overseeing networks of colleges and other providers (state, non-profit and for-profit) of post-secondary non-higher education.

Compared with the original plan, the advice will be focussed in a more multi-tier way (so not only at the overall national level) and in the advice for colleges there will be no specific focus on adult education (since this is now handled by the OER4Adults project) but rather more on private and private-public providers – in part due to the influence of the *OER College* archetype described earlier. The work will draw on policy work done originally for VISCED as presented last November at Online Educa OER workshop and earlier work for Re.ViCa and OPAL.

In autumn 2013, options briefs packs on proposed policies will be prepared for:

1. England, Wales and Scotland: three separate reports – the devolved administrations are particularly relevant given their similarity to many small European countries and their more centralised structure than England.
2. Italy: in view of the current turbulent situation nationally, it may focus more on the regional and institutional levels.
3. Netherlands, Hungary and France: three separate reports, of course.
4. Canada – a basis for this now exists in the report [http://poerup.referata.com/wiki/Overview\\_of\\_Open\\_Educational\\_Resources\\_Policies\\_in\\_Canadian\\_Institutions\\_and\\_Governments](http://poerup.referata.com/wiki/Overview_of_Open_Educational_Resources_Policies_in_Canadian_Institutions_and_Governments).

Each options brief pack will have a general introduction, a section for schools, a section for universities and a brief section on colleges. However, the detailed structure will be consistent with the structure of relevant ministries in the country and the 'language' of each document will be consistent with the terms and concepts that the country's education policies are conceived within that country. This will require each writer to keep up to date with the educational and the political situation in their country even if no formal updating of their country report is being done.

### *Exploitation*

Due to changes in national initiatives some changes have taken place in the plans for the three workshops. There are still three workshops as in the plan, but at different dates and in some cases amended purposes:

1. Workshop 1 with OER initiatives, UK: this will take place in March 2013 in the form of a special track at OER13, by POERUP staff joining the lunch meeting of the ALT OER SIG on day 2 of OER13, and by an increased number of invitations to UK experts for the Advisory Committee meeting.
2. Workshop 2 with OER initiatives, Italy: although there is no overall national initiative, a meeting with relevant initiatives will follow a similar pattern to the UK at an event and time still to be determined.

3. Workshop 3 with national OER initiative, Netherlands: this will take place with Wikiwijs at a joint event in early 2014.

The International Advisory Committee meetings are scheduled for:

1. IAC meeting 1: this will take place on day 2 of OER13, March 2013
2. IAC meeting 2: this will take place at the EDEN conference, Oslo, June 2013
3. IAC meeting 3: this will be a special workshop just before Online Educa 2013, Berlin in December 2013.

Current activities in Scotland and Wales will continue and strengthen. In England, closer liaison is being developed with the OER SIG of UK Association for Learning Technology (ALT) and with Futurelearn institutions (a case study for POERUP). An increasing number of discussions are being held with commercial entities and venture firms interested in, and in some cases funding, OER-related developments.

For France, there will continue to be regular meetings with the French ministry to discuss national policy and OER. Likewise in Canada, Athabasca University will liaise with relevant provincial ministries.

#### *Dissemination*

It would be tedious to give a full list of events that POERUP plans to be presenting at, thus only the more certain commitments are listed here:

1. OER13, Nottingham, March 2013 – paper from Ming Nie accepted and POERUP track of presentations included in the conference
2. OCWC Conference, Bali, May 2013 – paper from Prof Rory McGreal accepted
3. Learning Innovations and Quality (LINQ 2013), Rome, May 2013 – paper from POERUP submitted, to be presented by Rory McGreal and Paul Bacsich
4. EDEN conference, Oslo, 12-15 June 2013 – POERUP workshop submitted
5. Higher Education Leaders Conference, Rio de Janeiro, August 2013
6. Online Educa Berlin, 4-6 December 2013 – <http://www.online-educa.com>
7. OER14, in UK in first half of 2014 – POERUP aims to help to organise it.

#### *Evaluation*

A summative evaluation group session will be held in the final project meeting in October 2013 with a follow-up done in the last month of the project (April 2014), leading to the final summative evaluation report.

#### *Project management*

The third project meeting will take place on 25 & 28 March 2013, the day before and the morning after OER13, the UK national conference for OER projects taking place in Nottingham. This will focus on WP3 and administrative matters.

A follow-up meeting with focus on policy will take place with selected partners at EDEN June 2013 in Oslo.

The fourth and final project meeting will take place in October 2013 at the Open University of the Netherlands. This will be a full 3-day event due to the importance of finalising thinking on a range of project outputs.

## 6. Contribution to EU policies

### *EU policies*

Even though the main thrust of POERUP work on policy comes in the second half of the project, sufficient work has been done (as described in Section 3) to draw some broad conclusions to inform our work. There are a number of possible starting points that POERUP will explore in more depth:

1. The Paris OER Declaration – there is a concise version at [http://poerup.referata.com/wiki/2012\\_Paris\\_OER\\_Declaration](http://poerup.referata.com/wiki/2012_Paris_OER_Declaration)
2. The European Commission's Communication on *Rethinking Education: Investing in skills for better socio-economic outcomes*
3. The POERUP-based paper on *Suggestions on ten meta-principles for interventions*
4. The 'Policy shift' analysis for OER-related archetypes done in the UNESCO IITE paper on *Alternative Models of Education Delivery*
5. Recommendations from the OPAL project – [http://cdn.efquel.org/wp-content/uploads/2012/03/Policy\\_Support\\_OEP.pdf?a6409c](http://cdn.efquel.org/wp-content/uploads/2012/03/Policy_Support_OEP.pdf?a6409c)
6. As was done in the presentation to the OER workshop just prior to Online Educa, by adapting the policy recommendations for *virtual schools* to what we now call *OER/MOOC-based providers*.

As an example of how the last works, an example follows from rewriting and reinterpreting the VISCED recommendations at the end of VISCED (the VISCED final report was written in mid February 2013). (There are many parallels with the issues of regulating and supporting distance learning providers and also private providers.) *Note that the following are not polished recommendations from POERUP, merely an example of how the recommendations are developing:*

1. With oversight and co-ordination from the European Commission, individual countries' Education Departments should review the interface between the OER/MOOC-based providers' modes of operation and their own existing regulatory frameworks to ensure that where OER/MOOC-based providers help the nation achieve its educational, economic and social goals there are no unnecessary bureaucratic impediments which might inhibit their development and sustainability. OER/MOOC-based providers should be subject to the same degree of oversight (no more, no less) as conventional (face to face or online) providers and receive the same level of support.
2. The Commission should review *its own* frameworks, policies, and procedures to ensure that where OER/MOOC-based providers contribute to the achievement of its educational, economic and social goals there are no unnecessary bureaucratic impediments.
3. The Commission and individual Education Departments should consider how they might bring OER/MOOC-based providers within a regulatory and accountability framework which protects but does not disadvantage learners – or the providers. This need not be overly bureaucratic but should simply ensure equivalence with the accountability frameworks which underpin 'conventional' (face to face or online) institutions.

4. There is a need for clarity with regards to the ‘ownership’ of qualifications achieved by students who undertake studies at an OER/MOOC-based provider, be they at high school level, university level (thus taking account of Bologna), college level or vocational. The first ‘owner’ of any qualification is the student. However, such providers often struggle to justify their value and their funding because they may not be counted in ‘official’ censuses of qualifications. The Commission and individual Education Departments should clarify their positions in order to preserve the integrity of qualifications data both at EU level and nationally.
5. Individual Education Departments should review, and consider revising, current inspection/accreditation paradigms for providers – specifically to consider the development and recognition/adoption of Success Metrics for OER/MOOC-based providers. Basic criteria should be applied as to legality and governance, funding and sustainability, validity of qualifications, equality of student access and experience and, of course, the quality of the teaching and learning.

#### *‘Rethinking Education’*

The work that the European Commission started last summer, including the sessions with the Open Education Experts Group (already mentioned), led in due course to a ‘Communication’ from the Commission in late November 2012 entitled *Rethinking Education: Investing in skills for better socio-economic outcomes* – [http://ec.europa.eu/education/news/rethinking/com669\\_en.pdf](http://ec.europa.eu/education/news/rethinking/com669_en.pdf).

This provides a number of observations and Recommendations, backed by evidence collected. This will be a key input to and sounding board for our Recommendations.

Some of the Recommendations are already being taken into account – in particular the slightly greater focus in the second phase of POERUP on college level (vocational education and skills) is one consequence.

#### *National policies*

There is one further challenge of recent origin. Since the recession, many European countries, some with much publicity, others more discreetly, have been cutting their educational budgets, not only for institutions in some cases, but also in ministries (thus fewer civil servants), in the agencies that ministries used to rely on for advice, and in terms of the number and scale of projects contracted to university research teams to study specific aspects of education. Thus those of our colleagues tasked with writing policy papers in POERUP have a much more challenging task than they would have had a few years ago.

Thus even with the various policy-related tasks done ahead of schedule, and the key inputs including *Rethinking Education* to draw on, the POERUP project expects still to devote further significant analytic effort to framing POERUP’s policy recommendations for OER at European, member state and sectoral levels.

## 7. The wiki

It seems already a tradition that projects with wikis devote a section to them. POERUP does not want to break this tradition. However, this section is mainly of interest to technical people.

The POERUP wiki <http://poerup.referata.com> was set up on 7 March 2011, before the POERUP bid was submitted, as part of the process of securing the name POERUP – but deliberately contained no content until after the bid was submitted on 31 March 2011. The wiki software is MediaWiki 1.19.2 with many extensions including Semantic Wiki extensions – <http://poerup.referata.com/wiki/Special:Version> – this is the standard offering from the Referata organisation that supplies the bureau service for the wiki. Semantic capabilities are active but not extensively used yet.

By 7 April 2011 the wiki contained content (one page!) although no indication was given of which specific persons or institutions were behind it. After receiving notification of the success of the bid in early August 2011, a burst of activity took place at Sero to put the workplan and basic set of research reports online, a further 86 pages in a couple of weeks. Then activity died down while other projects were taken forward, but appropriately, on 18 November 2011, on the second day of the kick-off meeting, a page was created for Professor Gráinne Conole.

In fact the *pop-up wiki* approach has now been used by Sero and some other organisations as a routine tool in project management and information dissemination (see for example <http://luoerl.referata.com/wiki/LUOERL>, with its links to Mendeley). Thus by the time the project started the POERUP wiki had a basic set of pages and workplan and staffing information and Sero were experienced in this release of wikis, with semantic wiki features. This meant that POERUP got off to a flying start.

The statistics below are reported as of 28 February 2013 unless otherwise noted.

The POERUP wiki has 28 users with editing rights, at end February 2013 – <http://poerup.referata.com/wiki/Special:ListUsers> – at present, user codes are restricted to staff members of POERUP partners and some of the consultants contracted for reports and related studies. So far there has been no pressure from outsiders to contribute, but at this stage volunteer effort is not being actively solicited (noting that the Kuwait report was done by a volunteer). The users active in the last 30 days are shown at <http://poerup.referata.com/wiki/Special:ActiveUsers> – recent work is on finishing off the first full release of country reports and tidying up the wiki. To see what pages a user has edited, see *User contributions* – e.g. for **Pbacsich** see <http://poerup.referata.com/w/index.php?title=Special:Contributions&offset=&limit=500&tagfilter=&contribs=user&target=Pbacsich&namespace=>.

The wiki currently has 317 content pages out of a total of 626 (redirects, special pages, etc) and 27 uploaded files. There have been 3791 edits done, an average of 135 per user, though unevenly distributed – and note that number of page edits is not closely correlated with activity – some users do just minor edits and save every few minutes, some do much longer edits in one go.

The total number of page views is 134,443 – the most commonly viewed page is the Main Page with 18,162 views – and the most commonly viewed country is the United Kingdom with 1295 views. Other useful statistics are listed at <http://poerup.referata.com/wiki/Special:Statistics>.

