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Exploitation Report

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0. Executive Summary

This report is **Deliverable 6.2, Exploitation Report**.

The Exploitation Working Group did not have separate meetings but Exploitation was always an agenda item in partner face-to-face meetings.

At the end of the project in June 2014, the following was agreed between partners in terms of exploitation:

- POERUP has produced most of its outcomes and also often its work in progress (like country reports and presentations) as public documents licensed under Creative Commons (CC-BY 4.0). Thus it has little *private* intellectual property.
- The nature of European higher education and the pan-European (or even global) nature of the bidding mechanisms for research contracts means that traditional views of 'partner territories' are not useful.
- Consequently there would be no *general Partner Exploitation Agreement* signed between partners.

On the other hand, the following *specific actions*, with particular operational focus on Sero, EDEN and Athabasca, were agreed to fulfil the post-project obligations in the original POERUP work plan:

1. **EDEN** will maintain the POERUP web site www.poerup.info for a period of **two years** from 1 July 2014. All public deliverables and the final public report (once available) will be mounted on that site.
2. **Sero** will maintain the POERUP wiki poerup.referata.com for a period of **two years** from 1 July 2014.
3. **Sero** will maintain the POERUP OER Map site www.poerup.org.uk for a period of **18 months** from 1 July 2014.
4. **Sero** will maintain a small OER/MOOC secretariat for a period of two years from 1 July 2014 and will do occasional updates of the wiki, as part of its ongoing monitoring of the domain.
5. **Sero** will maintain and occasionally tidy up the POERUP Dropbox site for a period of **two years** from 1 July 2014.
6. Following existing practice with #revica and #visced, POERUP partners will be encouraged to continue to use the Twitter hashtag #poerup for two years.
7. Following up on informal discussions already with MENON and WikiEducator, in the context of eMundus, **Sero** will engage in formal discussions with these organisations, and with KU Leuven (who host the Re.ViCa/VISCED wiki), to see whether a migration and clustering of wiki sites in the area of ICT in education would be beneficial to (former) POERUP partners and the user community. Whatever the outcome of these discussions, the POERUP wiki would continue until 30 June 2016, in line with point 5 above.
8. Following existing practice among partners, there would be no obligation among partners to bid as a full POERUP consortium; but it would be expected that institutions who require a partner for a bid would give due weight to the experience of other POERUP partners.
9. It is expected that the Hewlett Foundation is soon to fund an *OER Mapping Hub* to facilitate on a global basis the collection and distribution of information on OER initiatives. POERUP partners **Sero** and **Athabasca** University are willing to collaborate with this Hub, if so requested and have the maps and database competences to do so.

1. Introduction

1.1 The brief

This is Deliverable 6.2 of Work Package 6 of POERUP. The Deliverable Title from the proposal is:

Exploitation Report

The Work Package title is:

Exploitation

The brief for the Deliverable states:

The Exploitation Report will describe the post-project exploitation strategy. It will distil the outcomes of the Exploitation Working Group into a Partner Agreement – an Appendix to this Deliverable. This should cover at least:

1. *Duration – minimum two years post-project*
2. *Central and distributed functions – e.g. secretariat, admin, wiki support*
3. *IPR issues – how to handle them*
4. *Approach to handling exploitation territories: essentially each partner looks after its home territory (ULE and Sero agree how to handle UK – and EDEN's host is regarded as Hungary) and also EU countries not home territories, and finally countries beyond the EU.*
5. *Exploitation team and tasks*
6. *Resource aspects*
7. *Membership of the exploitation consortium and how it may be extended.*

An Annex will report on how the wiki should be taken forward, in the light of other projects and developments relevant at the time the project finishes.

In reality, the Annex has become an Appendix *within* this Deliverable.

It should be noted that the Deliverable is *Public*, not Confidential as was Deliverable 6.1 (in both editions). This implies that details of some discussions and outcomes will not be given as they are commercial in confidence or confidential on the basis of being ongoing policy advice to ministries and agencies. However, the general thrust of the discussions can be made public.

It should also be noted that the Exploitation Report is *not* a report on the overall work in the Exploitation work package. Indeed there are separate public deliverables covering such as aspects as the International Advisory Committee. However, several of these aspects were germane to the final conclusions on exploitation and will be reported on.

The second edition of Deliverable 6.1 was in many ways an early draft of this report, and that will be substantially drawn on, but not quoted as such since that would violate its confidential nature.

2. Changes since start of project

2.1 The external environment

Since the POERUP project started a number of relevant changes have taken place in the external environment. These include, on the negative side until recently turning positive, in Europe:

- Continued recession or stagnation in several EU partner countries until recent months
- In some cases, government instability, though not in current partner countries
- Continued decline of interest of ministries in policies for ICT in education until an increase in interest in recent months in some countries (which include France, Ireland, UK, and Slovenia)
- Cessation of most large state-funded initiatives, balanced in the last year by growth in activity in other continents, whilst in Europe, growth in some countries in smaller-scale initiatives, some with a public-private aspect.

However, on the fully positive side, we find:

- Increase of government interest in, and actions to support, Open Access (to research), closely linked to OER and especially so in postgraduate higher education
- Continued growth of private-sector interest in and funding of developments in university-level education, including online education, with a particular focus on postgraduate education and employment-related skills
- The sweeping of the MOOC concept across the higher education sector, using many of the concepts from OER as well as from social networking but less concerned about the specific license details of OER – and now moving into VET and schools, even as the momentum may be slowing in higher education as business models remain elusive.

2.2 Within partners

Three partners have undergone significant changes that inevitably affect their future view of exploitation. Indeed, all partners have had to cope with an increasingly turbulent world where not just companies and foundations but also universities are now being buffeted by the “winds of change”.

Most seriously, SCIENTER had to withdraw from the POERUP project due to being declared bankrupt. The operational withdrawal took place with effect from 31 July 2013 but in reality their activity had declined sharply all through 2013 and the knock-on administrative aspects took six months more to finalise.

In the Netherlands around the same time, the Ministry of Education started cutting the funds to LOOK, the lead department in OUNL for POERUP. Fortunately some key staff were allowed to continue but the department is being wound up as the funding is expected to be cut to zero by the end of 2014.

In early summer 2014 it began to emerge that the University of Leicester were considering downsizing the Institute of Learning Innovation, the lead department for POERUP, and that several staff, maybe even senior staff, would leave or be absorbed back into the main institution.

On the more positive side, key staff at Sero, Athabasca, EDEN and the University of Lorraine continue unchanged.

It should also be noted that the POERUP workplan observed that “the best guarantee of sustainability is with individuals.” In more detail, quoting directly from the workplan:

As clear evidence of this (in line with our global approach) we note gurus [leading figures] such as Tony Bates (Canada) or Anne Forster (Australia) who have maintained their core interests and activities over many years, whatever their employer (or none). Close to home (i.e. the EU) – but more relevant – is that the same is true of many of the senior key individuals in the POERUP consortium.

3 The Exploitation Working Group

The Exploitation Working Group was defined in the bid to consist of the following partners:

- Sero
- University of Leicester
- Open University of the Netherlands
- EDEN
- Scierter

Other partners can contribute. In reality, all partners took part in the discussions.

Sero was the Workpackage leader and Chair of the Group.

3.1 EWG discussions

Partner meeting 1, November 2011

There was no discussion of Exploitation at the Partner Kick-Off Meeting in Leicester in November 2011. It was generally felt that it was too early in the lifetime of the project to add anything new to the plan already received.

Partner meeting 2, September 2012

In contrast there was significant discussion of exploitation at the Second Partner Meeting in Granada in September 2012. The following key points were made in the discussion “What do we want to exploit and how?” on the afternoon of day 1.

Note that points made are lightly edited from the meeting notes and are not necessarily self-explanatory or accepted into the strategy. Some points have a gloss – thus [gloss] or footnotes for further information. Many points are not actually about exploitation, more about what to study in order to exploit. All points were taken into account when planning the second half of POERUP including revising the exploitation strategy.

The material below has been edited to remove any confidential information. The specific (in some cases idiosyncratic) wording has been retained and some explanatory material has been inserted between square brackets.

Leicester

- exploit the network – social media etc, conferences – following on from OPAL¹ – for e.g. internal use

Athabasca

- work within organisations – internal value, increase profile and rank

¹ See OPAL, the Open Education Quality Initiative – <http://www.oer-quality.org> – which continues to be an influential project.

- use of comparator information to drive university policy (case studies)
- foster government ministers' careers

EDEN

- how much has the environment changed? (will OER dwindle?)
- do we need a more dynamic approach?
- focus exploitation on **practitioners** (but they are not interested in policy issues for long) – e.g. Jeff Haywood [Edinburgh University]
- highlight niche target groups

SCIENTER

- the value of POERUP is not to get fresh information but to concentrate on *analysis* – combine systematic review
- important to get into the discussion of scenarios – there are basic doubts if OER can help with costs and demand
- need a “surprise” element – “spicy” [probably said in reference to new scenarios]² and need to identify them
- do we need a slightly different style of country report? [no details given]³
- need to alternate operational detail with policy
- point out tensions [between operational level and policy]

University of Lorraine

- What does France want to know? “Benchmarking”
- E-learning Africa information [U de Lorraine will attend the next e-learning Africa conference]⁴
- La Francophonie means that there are relevant examples elsewhere than in France

OUNL

- “feed” Ministry of Education – noting that OER funding [for Wikiwijs from Dutch government] stops at end of 2013 and there is an election coming [it has now happened] – what can be done differently?
- target HEIs in creating more awareness – few Dutch institutions have an OER policy
- internally in OUNL – the new board for the new Rector may be more supportive
- research papers from WP3 will help⁵

² Some of this was taken into account in the position paper *Alternative Models of Education Delivery* (UNESCO IITE, September 2012), based in part on POERUP research – <http://iite.unesco.org/pics/publications/en/files/3214709.pdf>

³ The format was revised in the second half, to include policy and to a parameter-driven tabulation of initiatives and policies for each country/georegion.

⁴ In WP2, Sero is responsible for “general coverage of Asian and African OER” and a study on South Africa was commissioned from consultants. A later “Africa sweep” was done, looking for initiatives and policies.

⁵ This was carried out most effectively in the IRRDL paper “An investigation into social learning activities by practitioners in open educational practices” by Bieke Schreurs, Antoine Van den Beemt, Fleur Prinsen, Gabi Witthaus, Grainne Conole, and Maarten de Laat, 2014.

Sero

- target ministers – issue of education v commerce [UK is a country with a politically active though currently small private-sector HE provision]
- dangers of OER (barriers and threats to uptake) – compare the example of open access to music – local factors e.g. in Canada – gap analysis e.g. publishers
- move to Open Access is somehow more acceptable.⁶

Interim evaluation 2013

The systematic interviews for the mid-point formative evaluation surfaced comments from one staff member about exploitation at a partner discussion:

- Get IAC up and running [first formal meeting is in March 2013 within OER13]
- More targeted strategic discussion needed with external stakeholders through social media and face to face meetings
- Identify target audiences for exploitation [more] clearly
- Explore intercultural aspects of reaching and engaging with policy makers.

These aspects were taken forward in the second half of the project.

Partner meeting 3, March 2013

The standard agenda item on exploitation was more of a reporting of progress rather than a discussion of changes in approach. However, there was a brief general discussion as to whether current exploitation was currently too HE-focussed.

Future activities on exploitation were discussed:

1. Workshop 1 with UK national OER initiative – at OER13⁷
2. Workshop 2 with national OER initiative – 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 determined⁸
3. Workshop 3 with national OER initiative – Netherlands: since there is still a stable Dutch OER initiative, this will take place with Wikiwijs at a joint event in early 2014.

There was also a planning discussion on the future IAC workshops:

1. IAC workshop 1: at OER13⁹
2. IAC workshop 2: to take place at EDEN conference, Oslo, June 2013
3. IAC workshop 3: a special workshop just before Online Educa 2013, Berlin in December 2013.¹⁰

⁶ In this context we note OpenDOAR, the tabulation of OA repositories, which was reviewed for OER Mapping. See <http://www.opendoar.org>

⁷ Immediately after this partner meeting.

⁸ This never took place as Sciento withdrew soon after.

⁹ Immediately after this partner meeting.

Partner meeting 4, December 2013

There was a substantial discussion on several topics within the Exploitation agenda item.

First, the new EU projects won by one or more partners were scrutinised for exploitation possibilities:

- VM-PASS – OER accreditation: EFQUEL
- EMMA: MOOCs (starting February 2014)
- eMundus: (starting December 2013)¹¹

A number of other routes were discussed, of which the one that was most fruitful was to have a focus on exploitation of project results at EDEN in Zagreb, June 2014.

In online and other meetings

Until near the end of the POERUP project there was no discussion of Exploitation outside the partner meetings. In particular it has not been a topic of any of the tele-meetings until the final one. This is not surprising since the tele-meetings are short and focussed. However at the final online meeting in June 2014 there was a long discussion from which the main conclusions emerged. The minutes record the following points:

1. Discussion about necessity of a Partner Exploitation Agreement. Not explicitly required by workplan; will discuss with other experienced LLP project managers at EDEN and take their advice. If the conclusion is that (largely for external evaluation purposes) we should have one, this will be kept as simple as possible.¹²
2. All partners will need to write exploitation statements – in their own words – for D6.2 (Exploitation Report) and Paul's Final Report. Paul advised partners to look back at their own 'biographies' in the original proposal and consider how they could best exploit the POERUP outputs and outcomes. Need to distinguish between exploitation and dissemination – both of which need to continue after the end of the funded project.
3. It would be very useful to include a statement from Bieke [Schreurs];¹³ she is at present due back at work towards the end of August and we would explore how this could be achieved.
4. Noted that we are now beginning to achieve considerable recognition – the Commission (and IPTS) acknowledge our influence on Opening Up Education and the subsequent debate and the various mapping projects¹⁴ which are under way acknowledge POERUP.

¹⁰ Later the venue was changed to the Media and Learning conference, Brussels, around the same date.

¹¹ The links to eMundus have (so far) been the most fruitful – eMundus has publicly acknowledged its debt to POERUP for both country reports and tables of initiatives. See for example the eMundus consolidated report on Europe – <http://wikieducator.org/Emundus/Europe>

¹² In the end it was decided that one was not necessary. The view of Leicester as Applicant was given considerable weight.

¹³ Bieke Schreurs, the lead researcher at OUNL and continuing to be employed at OUNL despite the closure of LOOK. Also the proud mother of "the POERUP baby".

¹⁴ There are specific acknowledgements from mapping projects, not only from the eMundus Atlas but also from the Brazilian project MIRA which noted "Metadata standard shared among projects (eMundus/POERUP) and aligned with Dublin Core" (http://www.cest.poli.usp.br/wp-content/uploads/sites/26/2014/05/hewlett_presentation.pdf). There is also increasing informal collaboration with the Hewlett-funded OER Hub at the UKOU over policy matters – note in particular their remark that: "As the Policies for OER Uptake (POERUP) Consortium reports, we are in a period where fully developed national or international initiatives are still emerging." (<http://oerresearchhub.org/collaborative-research/hypotheses/hypothesis-j-policy/>) – they also acknowledge POERUP input on descriptions of specific policies.

3.3 Partner views at the end of the project

The project management decided towards the end of the project, and as part of the data collection for the Progress Reports, to invite partners to provide a paragraph or two on their activities and their views. These are given below. They are an update of what partners provided for the Interim Report. (Brief versions of these are included in the Final Public Report.)

Sero – UK

Sero is and remains a consultancy interested, inter alia, in ICT-facilitated change management across all sectors of formal education. Sero is already exploiting the POERUP database and mapping technology both within the OER/MOOC area, and more widely, in its ‘traditional’ business areas of virtual schools, colleges and universities and the libraries/repositories that support these. Sero is actively looking for more policy work both at national and international level but also within institutions and mission groups – using information from POERUP and its other consultancy work including systems review and benchmarking. Sero now has a specific consultancy arm SeroHE focussing on universities with Paul Bacsich as a key member. Projects including SharedOER and SEQUENT are already leveraging on POERUP. Paul Bacsich has already participated in national bid review panels in the UK and Ireland which are judging projects with OER aspects and is using POERUP expertise in these tasks.

During the project, Sero remained strongly linked to e-learning, library and information technology circles in England through POERUP and consultancy work, including being committee members of the OER14 conference (and on the OER15 planning committee). Research links with the University of Southampton and increased joint working with the Open University are also beneficial. A recent consultancy study on flexible learning for the Higher Education Academy allowed the discussion of a number of policy ideas with institutions.

Through POERUP and consultancy work (e.g. with the University of South Wales, a member of OER u), Sero staff maintained good links in Wales and co-presented at a webinar to Welsh delegates on policy matters.

Through earlier consultancy work in Scotland, coupled with personal contacts and networking via Open University circles, Sero staff maintained good links in Scotland, which also supplied one of the case studies (Re:Source).

The case study interviews for FutureLearn helped foster dialogue in both England and Scotland.

University of Lorraine – France

The University of Lorraine is an active partner in the FUN initiative (France Université Numérique) and, if it is successful, will play a key role in the new Erasmus+ D-TRANSFORM project on leadership development in open online learning (Sero and EDEN are also involved).

During the project, the University of Lorraine had meetings several times each year at the Ministry, with which key POERUP staff have close links. The University had already presented POERUP project several times in Ministry circles.

EDEN

EDEN is the largest formal European community of practitioners, academics and scholars, with a continuity in its activities aiming to support the consolidation of the huge knowledge base of open education, e-learning and learning innovation. This field is subject to rapid changes, because of developments in the technology and changing user habits and social needs. EDEN will continue its role of credible professional and academic ‘ateliers’, with systematic work, collection and analysis of data, mapping, intelligent observations combined with justifiable analysis and validation. EDEN’s

contribution will come from its regular activities focused on the professional community: the Annual European conferences, the Research Workshops, the scholarly publications – European Journal of Open, Distance and E-Learning (EURODL) and the Members' Portal (Network of Academics and Professionals – NAP). A specific Interest Group may be set up at the NAP web area for the OER policy theme, a particular POERUP follow-up.

Athabasca University – Canada

Athabasca University continues to support Professor Rory McGreal as Chairholder of a UNESCO OER Chair and also remains active in OER and MOOCs for its own teaching purposes (with a recent C\$2million budget) as well as wider collaborations (eMundus, etc).

During the project, Athabasca University delivered a workshop to Alberta government officials and HEI representatives in collaboration with Campus Alberta; and delivered an online workshop in collaboration with the OER Foundation to faculty in over 60 countries. AU also actively participated in a workshop on OER in British Columbia, which resulted in an announcement of 40 OER courses to be produced for first year students in universities. AU staff were also instrumental in facilitating the recent tri-province agreement on OER between the Western Provinces¹⁵.

Open University – Netherlands

OUNL will continue its efforts on OER and MOOC with their partnership in OpenUpEd and their offerings of MOOC's (in most cases in the Dutch language). They are involved in several EU-funded projects on MOOCs (EMMA, HOME and ECO). Their plan is to continue the UNESCO Chair on OER after the retirement later in 2014 of the current chair holder, Fred Mulder. Although the lead department for POERUP (LOOK) is being closed down because of the Dutch government's withdrawal of funding, and some staff leaving, other POERUP staff are staying on, in other departments, including Bieke Schreurs, the lead researcher on the case study work.

During the project, at OUNL, the lead department for POERUP was closely linked to the Dutch Government. OUNL, via Fred Mulder in particular, had integrated results from POERUP in their communications with the Dutch government and discussed implications at the policy level. OUNL was also closely involved in the Wikiwijs project until that ceased in its original form at the end of 2013.

University of Leicester

In the short term the University of Leicester will continue its interest in OER through the various OER-related research projects that it is involved with. Even if the Institute of Learning Innovation were to close completely and specific ILI staff (including Professor Conole) were to leave, the University would still continue its involvement with MOOCs via the FutureLearn initiative. (Leicester has run two FutureLearn MOOCs to date: Richard III and Forensic Science. Two further MOOCs are in development and will be delivered in the autumn.). The University is also continuing to manage the OER-related LLP projects it has in its portfolio.

During the project, the University of Leicester delivered a number of presentations on POERUP to a delegation of 30 representatives from the Open University China and a delegation from India. In addition, insights from POERUP were presented at numerous keynotes given by Gráinne Conole, including in: Iceland, Sweden, Denmark, Ireland, New Zealand, South Africa, Spain, and Germany.

¹⁵ <http://www.gov.sk.ca/adx/asp/adxGetMedia.aspx?mediaId=f3d342c4-ab61-44a4-9f96-71ceb7810a5d&PN=Shared>

Scienter – Italy

They have gone bankrupt and withdrawn from the partnership.

4. Outcomes and Recommendations

4.1 Outcomes

At the end of the project in June 2014, the following was agreed between partners in terms of exploitation.

POERUP outputs

POERUP has produced most of its outcomes and also often its work in progress (like country reports and presentations) as public documents licensed under Creative Commons (CC-BY 4.0). Thus it has little *private* intellectual property. In particular:

- Information on each OER initiative is available from its wiki pages and as linked open data from the initiatives database and the wiki.
- All country reports are available as wiki pages or as PDF files linked from these pages: these include the various tabular reports of initiatives and policies created during the final update stage.
- All public deliverables are available from the web and the wiki.
- Virtually every presentation and conference paper is available, via the wiki or Slideshare or conference sites.
- There are almost no private deliverables, except for interim documents and internal management reports. Even the final Exploitation Report and the minutes of the International Advisory Committee workshops are public!

Global aspects

The nature of European and Canadian higher education (MOOC students can study anywhere) and the pan-European (or even global) nature of the bidding mechanisms for research contracts means that traditional views of ‘partner territories’ are no longer useful, even before one tries to consider what the ‘territory’ would be of an international network such as EDEN.

Changes to the Consortium

With the demise of one partner and the changes of focus in some others, there is much greater focus on what specific partners need.

Conclusions

Consequently there would be no *general Partner Exploitation Agreement* signed between partners, of the kind that apportions rights and duties across the consortium.

4.2 Recommendations

On the other hand, the following *specific actions*, with particular operational focus on Sero, EDEN and Athabasca, were agreed to fulfil the post-project obligations in the original POERUP work plan. The responsibilities are taken by the natural owners of these. The general principles and timescales are similar to those negotiated between certain VISCED partners at the close of VISCED in December 2012.

1. **EDEN** will maintain the POERUP web site www.poerup.info for a period of **two years** from 1 July 2014. All public deliverables and the final public report (once available) will be mounted on that site.
2. **Sero** will maintain the POERUP wiki poerup.referata.com for a period of **two years** from 1 July 2014.
3. **Sero** will maintain the POERUP OER Map site www.poerup.org.uk for a period of **18 months** from 1 July 2014. The shorter time period is because of the expense of hosting this solution, which in any case is an interim one pending the resolution of certain funding, technical and partnership discussions.
4. **Sero** will maintain a small OER/MOOC secretariat for a period of two years from 1 July 2014 and will do occasional updates of the wiki, as part of its ongoing monitoring of the domain – as it is doing currently.
5. **Sero** will maintain and occasionally tidy up the POERUP Dropbox site for a period of **two years** from 1 July 2014.
6. Following existing practice with #revica and #visced, POERUP partners will be encouraged to continue to use the Twitter hashtag #poerup for two years. (VISCED hashtags are still being used over a year after project end.)
7. Following up on informal discussions already with MENON and WikiEducator, in the context of eMundus, **Sero** will engage in formal discussions with these organisations, and with KU Leuven (who host the Re.ViCa/VISCED wiki), to see whether a migration and clustering of wiki sites in the area of ICT in education would be beneficial to (former) POERUP partners and the user community. Whatever the outcome of these discussions, the POERUP wiki would continue until 30 June 2016, in line with point 5 above. There is more on the Appendix on this matter.
8. Following existing practice among partners – and as demonstrated already in VM-PASS, eMundus and D-TRANSFORM to name but three, there would be no obligation among partners to bid for OER-related work as a full POERUP consortium; but it would be expected that institutions who require a partner for a bid would give weight to the experience of other POERUP partners.
9. It is expected that the Hewlett Foundation is soon to fund an *OER Mapping Hub* to facilitate on a global basis the collection and distribution of information on OER initiatives for 12 months from December 2014. POERUP partners **Sero** and **Athabasca** University are willing to collaborate with this Hub, if so requested, and have the maps and database competences to do so.

Appendix: Taking the wiki forward

The brief for this Appendix (originally an Annex) was as follows:

An Annex will report on how the wiki should be taken forward, in the light of other projects and developments relevant at the time the project finishes.

Similar material to what follows can be found in the Final Public Report (section 7) and Deliverable 2.1 Edition 2, *Transversal and categorised inventory of OER Programmes and Initiatives – on maps.*

A.1 Some history

When the POERUP bid was being planned, and indeed when the POERUP project started, the VISCED project was under way. This used a wiki hosted by the University of Leuven (KU Leuven). However, KU Leuven were not a partner in POERUP and at the time it was felt unwise in branding terms to use an existing wiki used by another LLP project, as it could be hard to disentangle the contribution of POERUP from that of VISCED. There was also a desire by the VISCED bid team to use a wiki that had more functionality than the basic MediaWiki software in widespread use on VISCED, Wikipedia, WikiEducator and many private wikis.

The Referata hosting service www.referata.com had been used by Sero staff on some small projects and seemed suitable, with many sophisticated features available beyond the basic wiki functions. Thus this was chosen.

In reality when POERUP started the demands of the project meant that the sophisticated features of the Referata software were little used except for some minimal semantic functions. However steps were taken to ensure that cross-linking between POERUP, VISCED, English Wikipedia and some other specialised wikis ensured a relatively seamless user experience – and in particular the country report pages routinely linked to the corresponding VISCED and Wikipedia ones. The user experience was made even more seamless by POERUP adopting the various naming schemes built up over 5 years of Re.ViCa and then VISCED experience.

There the situation stayed for many months, despite the occasional experiment – in particular the Thailand POERUP page was deliberately created on the VISCED wiki, and the VISCED wiki was enhanced by a number of OER-related entries.

In fact in December 2013 discussions had taken place with MENON (facilitated in the context of the eMundus project) and the OER Foundation about the long-term home of the POERUP pages being the WikiEducator wiki where MENON country pages are to be found (see for example <http://wikieducator.org/Emundus/Mexico>). There was general agreement that this transition would be manageable.

The situation was transformed in 2014 when the demands of database collection and mapping came to the fore, and attention at some partners turned to issues of exploitation. This change of focus was reinforced by the gradual acceptance by the OER community in Europe (much more so than in the US) that OER *had* to be seen in the wider context of what in Europe was increasingly called “Opening Up Education”, so that there was a seamless path in one direction from pure OER to high-fee online Masters courses, and in another direction (at right angles, not opposite) from Open Access towards “educational” OER. All of the 2014 partners in POERUP had a strong higher education focus (it is a key line of business for Sero) so that although POERUP deliberately covered all sections of formal education, the HE space was seen as most conducive to further projects and commercial activities.

The mapping and database activities also reminded people that there was much content on the VISCED wiki that had not been exploited in POERUP. In particular, VISCED had useful sets of pages on

regions (states, provinces, länder) in the main federal countries – Germany, US, Canada, Australia, India, Brazil etc. In addition, VISCED (largely dating from the previous Re.ViCa era) had over 500 entries on universities (as well as many on colleges and schools), many of whom were now hosting OER or MOOC activities as well as more commercially-focussed programmes. Thus in the last few weeks of POERUP activity prior to reporting, much of this material was loaded on to the POERUP wiki, incidentally providing a much fuller user experience with far fewer “red links” (an earlier criticism of the interim evaluator report).

Finally, the demands of mapping and import made it very clear that the POERUP wiki could make good use of the advanced level of reporting tools now available in the Referata suite. The Main Page of the wiki now links to a plethora of mapping, search and reporting screens.

Thus the discussion which needs to take place is not now “where will the POERUP material migrate to?” but rather “what might be a useful common hosting solution for the various educational wikis?”

The POERUP wiki has demonstrated the added value of the Semantic MediaWiki tools hosted by Referata in mapping, reporting, searching, import and export. It is no longer feasible for POERUP to revert to “vanilla” wiki hosting. Moreover the hosting costs of the POERUP wiki are nil, provided it remains active and public.

The expected announcements by Hewlett on a global mapping approach for OER initiatives are likely to engender wider discussions about common action in the overall OER domain. POERUP looks forward to these discussions.

More information can be found in related Deliverables. One extract is given below and further information is available in the Project Final Reports.

An extract from Deliverable 2.1 Edition 2

Sero is familiar with the Semantic Wiki approach as it is used in the POERUP wiki it runs for the POERUP project, hosted on the Referata wiki farm – <http://poerup.referata.com>. While there are performance issues for semantic wikis as volumes rise, these were not expected to be severe for the relatively low volumes of traffic from the group of OER specialists dedicated enough to make updates. (The situation is quite different for massive user searches from across the world – hence our use of Stand-alone Map Tool for Search.)

There is now a Create/Edit Open Education Initiative summary entry page on the POERUP wiki which allows input of the same fields as on the Sero OER Map tool – <http://poerup.referata.com/wiki/Form:InitiativeSummary> – but behind the scenes builds semantic information. A bonus of using Semantic Wiki is that geocoding can be done within the system and that one can output geocodes to maps. A proof-of-concept of geocoding input is at <http://poerup.referata.com/wiki/Form:Location> – this has been used for the creation of a number of “city” and “region” pages on the wiki.

These tools are available to all registered users of the POERUP wiki. Interested parties not authorised as POERUP wiki editors but wishing to try this now that the project has ended should contact Paul Bacsich for registration.

To support the user editing phase on the POERUP wiki, the wiki was populated from MongoDB by using the ImportCSV Extension available in the wiki, driven by a suitable Template. For an entry point to this data, see http://poerup.referata.com/wiki/Category:Open_Education_Initiatives.