POERUP: Policies for OER Uptake

Final Report Public Part

Project information

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Executive Summary (English)

1. POERUP's overall aim was to develop *policies* to promote the uptake of OER (Open Educational Resources) in the educational sector, to further the range of purposes for which institutions deploy OER: opening up education, widening access (including internationally and in particular from developing countries), higher quality or lower cost of teaching – and combinations of these. These policies were to be oriented to the *European Union* and *a specified range of countries, all but one in Europe*.
2. POERUP focussed largely on the universities and schools subsectors of the education sector, but also paid attention to the non-tertiary post-secondary subsector (VET) – the 'colleges' – so often the loci of the kind of informal learning that OER facilitates, but also crucial loci for skills development.
3. The original focus of POERUP was to focus on policies only at the 'national' level (including governments of top-level devolved administrations such as Scotland or Flanders). In the progress of the project, given the increasingly fragmented environment for education, it was also felt appropriate to look at *consortia of institutions*, including with private sector actors who facilitate change, as often in the MOOC (Massive Open Online Courses) space – such as FutureLearn and OER u. However, it was *not an aim of POERUP* to produce a set of policy recommendations oriented to *institutions*, or a set of *critical success factors for initiatives*.
4. POERUP put substantial effort into understanding the state of play of OER initiatives and the policy environment in a range of countries, within the context of the wider development of online learning in these countries – but cognisant also of the worldwide moves towards Open Access for research literature and general resources and the wider "Open" context. However, it was *not an aim of POERUP* to produce a comprehensive database (or map) of *all* OER initiatives.
5. Indeed, POERUP was a project in the discipline of **comparative education**: such a project carrying out comparative education has to *prioritise*. POERUP had to decide which countries were *most relevant* to European Lifelong Learning and within the set of relevant countries decide which countries would be studied by partners and which by contracted experts paid by POERUP, or in some cases via third parties not paid from POERUP funds. It was *not an aim of POERUP* to study all countries.
6. The countries that POERUP studied came not only from Europe, but also from each continent. Outside Europe we focussed more on countries with linguistic, cultural or political links to countries in Europe, in particular the non-European OECD members such as Australia, Canada, Mexico, New Zealand and the US. There was of course much activity in the US in an ever-changing situation: there we studied a representative set of exemplars. Developed but non-OECD countries studied included Argentina, Thailand, South Africa and six countries in the Middle East.
7. We knew from several former projects of this sort that the kind of global study that POERUP did was expensive and *potentially* infeasible within typical

Lifelong Learning Programme budgets (circa €500K) – thus POERUP was particularly concerned to provide *value for money* to the EU. A key strategy to achieve this was to partner informally with other projects and agencies to ensure that POERUP did not carry out any country studies, which were already being done by other agencies. This was initially time-consuming and led to some minor delays while other agencies carried out their processes, but the financial benefit of avoiding unnecessary country studies was substantial and indeed the only way that POERUP could have proceeded. There were also other positive outcomes of the consultation process including ongoing collaboration with IPTS, UNESCO IITE Moscow, OER U/ WikiEducator, CommOER/Wikipedia and OER Asia, as well as with several independent experts. An active group of experts led to three very useful workshops under the auspices of the International Advisory Committee.

8. The first round of **country studies** was completed by the time of the Progress Report, but, in accordance with the workplan, effort was held back to put into selected update studies in 2014. This update process was a very useful exercise and established that in the last 18 months several countries formerly regarded doing little in OER had in fact become active – Germany in particular. The initiatives are all documented in a large **database** and can be shown on a searchable **OER Map**.
9. A key topic in POERUP policy work was 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 were used to support this task. Eight case studies for **OER communities** were chosen across the various education sectors for analysis by POERUP partners, at varying degrees of depth. These include the schools-focussed projects DigiSchool (Netherlands, linked with Wikiwijs) and Bookinprogress (Italy); HE-focussed projects OER U (global), Futurelearn (UK) and BC Campus (Canada); VET-focussed ALISON (Ireland) and Re:Source (Scotland); and a specific MOOC project in informal adult learning (University of Amsterdam). The analyses led to policy options and a series of recommendations for effective running of such projects in future.
10. POERUP's policy work started early (as documented in the Progress Report). It was closely linked to discussions on Opening Up Education. Three EU-level policy reports were produced in autumn 2013, with a summary presented at the EU OER workshop at Online Educa in December 2013. In 2014 specific policy documents were produced for five member states (UK, Ireland, France, Poland and Netherlands) plus Canada. In addition to formal policy work, informal policy discussions were held at workshops in five more member states: Norway, Slovenia, Hungary, Romania and Croatia.
11. The internal evaluator of POERUP completed a full series of **evaluations** of POERUP, based on reflective practice from POERUP staff and consultations with consultants and stakeholders.
12. **Future plans** from members of the POERUP consortium include participation in projects: some have started already, such as **VM-PASS**, **eMundus**, **SharedOER** and **D-TRANSFORM**, others are as we write still in process of submission and judgement. There are other exploitation moves under way as opportunities develop, with a focus on the wiki and database.

Executive Summary (Nederlandse Samenvatting) – Dutch

1. Het algemene doel van POERUP was om beleidsadvies te ontwikkelen om de inzet van OER (open leermaterialen) in de educatieve sector te bevorderen en om de doeleinden waarvoor instellingen OER implementeren te vergroten: openstelling van het onderwijs, een ruimere toegang (inclusief internationaal en met name uit ontwikkelingslanden), hogere kwaliteit of lagere kost voor het onderwijs - en combinaties daarvan. Dit beleid is gericht op de *Europese Unie* en *een bepaald aantal landen*, *op een na alle in Europa*.
2. POERUP richtte zich voornamelijk op universiteiten en scholen, maar er werd ook aandacht besteed aan de niet-tertiair post-secundaire subsector (VET) - de 'colleges' – gezien zij vaak de loci zijn van informeel leren wat OER vergemakkelijkt, alsook cruciale loci voor de ontwikkeling van vaardigheden.
3. De oorspronkelijke focus van POERUP was het beleid op 'nationaal' niveau (met inbegrip van de regeringen van decentrale overheden, zoals Schotland of Vlaanderen). In de voortgang van het project, gezien de gefragmenteerde omgeving voor onderwijs, werd het ook passend geacht om te kijken naar consortia van instellingen, inclusief de particuliere sector, met name MOOC (Massive Open Online Courses) aanbieders - zoals FutureLearn en OER u. Het was echter niet een doel van POERUP om beleidsaanbevelingen of een set van kritische succesfactoren voor dit soort initiatieven te produceren.
4. POERUP zette zich aanzienlijk in voor het begrijpen van de stand van zaken van OER-initiatieven en het beleid hierrond in een aantal landen, in het kader van de bredere ontwikkeling van online leren in deze landen - maar de wereldwijde beweging naar Open Access voor onderzoeksliteratuur en algemene middelen en de bredere "Open" context. Het was echter niet een doel van POERUP om een uitgebreide database (of kaart) van *alle* OER-initiatieven te produceren.
5. Inderdaad, POERUP was een project in de discipline van het vergelijkende onderwijs: een dergelijk project van vergelijkende onderwijs moet prioriteren. POERUP moest beslissen welke landen het meest relevant waren voor Europese Leven Lang Leren en binnen deze reeks van relevante landen besluiten welke landen bestudeerd zouden worden door de project partners en welke door gecontracteerde deskundigen door POERUP betaald, of in sommige gevallen via derden, niet betaald uit POERUP fondsen. Het was geen doel van POERUP om *alle* landen te bestuderen.
6. De landen die POERUP bestudeerde kwamen niet alleen uit Europa, maar uit elk continent. Buiten Europa zijn we meer gericht op landen met taalkundige, culturele of politieke banden met landen in Europa, in het bijzonder de niet-Europese OESO-landen, zoals Australië, Canada, Mexico, Nieuw-Zeeland en de Verenigde Staten. Er was natuurlijk veel activiteit in de VS in een steeds veranderende situatie: hier bestudeerden we een representatieve set van voorbeelden. Van de ontwikkelde, maar niet-OESO-landen bestudeerden we Argentinië, Thailand, Zuid-Afrika en zes landen in het Midden-Oosten.
7. We wisten van een aantal voormalige gelijksoortige projecten dat de aard van een wereldwijde studie onhaalbaar is binnen de budgetten van het Leven Lang Leren programma (circa € 500K) - dus POERUP heeft er zich vooral op gericht om binnen het budget zo veel mogelijk te bereiken voor de EU. Een belangrijke strategie was om informeel samen met andere projecten en

instanties ervoor te zorgen dat POERUP geen landenstudies deed, die reeds werden uitgevoerd door andere instanties. Dit was in eerste instantie tijdrovend en heeft geleid tot enkele kleine vertragingen, maar het financiële voordeel van het vermijden van onnodige landenstudies was aanzienlijk en ook de enige manier waarop POERUP kon voortgaan. Er waren ook andere positieve resultaten van het raadplegingsproces, waaronder lopende samenwerking met IPTS, UNESCO IITE Moskou, OER U / WikiEducator, CommOER / Wikipedia en OER-Azië, maar ook met een aantal onafhankelijke deskundigen. Het betrekken van deskundigen heeft geleid tot drie zeer nuttige workshops onder auspiciën van de International Advisory Committee.

8. De eerste ronde van de landenstudies werd voltooid tegen de tijd van het voortgangsrapport, maar in overeenstemming met het werkplan, werd er in 2014 een grote update gedaan van bepaalde landen. Deze update was een zeer nuttige oefening en hierdoor werd er vastgesteld dat in de afgelopen 18 maanden een aantal landen, voorheen beschouwd als weinig actief rond OER, in feite zeer actief geworden zijn op het gebied van OER- Duitsland in het bijzonder. De initiatieven zijn allemaal gedocumenteerd in een grote database en kunnen getoond worden op een doorzoekbare OER Kaart.
9. Een belangrijk onderwerp in het beleidsonderzoek van POERUP was om inzicht te krijgen in de manieren waarop OER communities kunnen voortbestaan zonder aanhoudende overheidssubsidies. Er werd gebruik gemaakt van Sociale Netwerk Analyse. Er werden acht casestudies geselecteerd in verschillende onderwijssectoren. Deze omvatten de scholen-gerichte projecten Digischool (Nederland, verbonden met Wikiwijs) en Bookinprogress (Italië); HO-gerichte projecten OER U (globaal), Futurelearn (UK) en BC Campus (Canada); -VET gericht ALISON (Ierland) en Re: Source (Schotland); en een specifiek MOOC project in informele volwasseneneducatie (Universiteit van Amsterdam). De analyses hebben geleid tot beleidskeuzes en een reeks aanbevelingen voor een effectieve werking van dergelijke projecten in de toekomst.
10. POERUP beleidswerk begon vroeg (zoals gedocumenteerd in het voortgangsverslag). Het was nauw verbonden met de discussie over de openstelling van het onderwijs. Drie EU-niveau beleidsrapporten werden geproduceerd in het najaar van 2013, met een samenvatting in de EU OER workshop in december 2013 gepresenteerd op Online Educa. In 2014 werden bepaalde beleidsdocumenten geproduceerd voor vijf lidstaten (Verenigd Koninkrijk, Ierland, Frankrijk, Polen en Nederland) plus Canada. Naast het formele beleidswerk, waren er informele beleidsbesprekingen tijdens workshops in vijf lidstaten: Noorwegen, Slovenië, Hongarije, Roemenië en Kroatië.
11. De interne evaluator van POERUP voltooide een volledige reeks evaluaties van POERUP, gebaseerd op de reflectieve praktijk van POERUP partners en in overleg met adviseurs en belanghebbenden.
12. Toekomstplannen van de leden van de POERUP consortium zijn de deelname aan projecten: sommige zijn al begonnen, zoals VM-PASS, eMundus, SharedOER en D-transformatie, anderen zijn als we schrijven nog steeds in proces van indiening en oordeel. Er zijn andere exploitatie stappen in de maak door nieuwe mogelijkheden, met een focus op de wiki en de database.

Executive Summary (Note de Synthèse) – French

1. L'objectif global de POERUP était de développer des *politiques* pour favoriser l'essor des REL (Ressources Éducatives Libres) dans le secteur de l'éducation, afin d'inciter les institutions à les utiliser pour les raisons suivantes : ouverture de l'éducation, élargissement de son accès (y compris à l'étranger, particulièrement dans les pays en développement), amélioration de la qualité et réduction des coûts d'enseignement – ainsi que la combinaison de toutes ces raisons.
2. Même si POERUP concerne principalement les enseignements secondaire et supérieur, nous avons également pris en compte le secteur de l'enseignement professionnel et technique, souvent demandeur du type d'apprentissage informel que permet les REL, et secteur crucial dans le développement des compétences.
3. À l'origine, POERUP concernait seulement les politiques à l'échelle *nationale* (y compris dans le cadre de gouvernements locaux tels que l'Ecosse ou la Flandre). Au cours du projet, étant donné la fragmentation croissante des environnements éducatifs, il nous est apparu utile de nous pencher également sur les *associations d'institutions*, y compris avec des acteurs privés porteurs de changements, comme le sont souvent les plateformes de MOOC (formations en ligne ouvertes à tous) telles que FutureLearn et OERu. Cependant, *l'un des objectifs de POERUP n'était pas* de produire un ensemble de recommandations de politiques à l'usage des *institutions*, ou un ensemble de *facteurs critiques de succès des initiatives.*
4. POERUP a concentré ses efforts sur l'établissement d'un état des lieux des initiatives REL et des cadres politiques d'un certain nombre de pays dans le contexte plus large du développement de l'apprentissage en ligne dans ces pays et de l'engouement mondial vers le libre accès aux littératures de recherche et à toutes les autres ressources en général, ainsi que du développement de la culture du « libre ». Cependant, *POERUP n'avait pas pour objectif* de produire une base de données exhaustive (ou un plan) de *toutes* les initiatives REL.
5. En effet, POERUP était un projet d'**éducation comparée** : un tel projet se doit *d'établir des priorités*. POERUP a dû déterminer quels étaient les pays *les plus impliqués* dans le programme européen d'éducation et de formation tout au long de la vie. Parmi ces pays, il a fallu choisir ceux qui allaient être étudiés par nos partenaires et ceux étudiés par des experts contractuels engagés par POERUP, ou dans certains cas par des tiers non financés par des fonds POERUP. *POERUP n'avaient pas pour but* d'étudier tous les pays.
6. POERUP ne se limitait pas seulement aux pays européens ; tous les continents étaient représentés. En dehors de l'Europe, notre attention s'est

portée sur des pays entretenant des liens linguistiques, culturels ou politiques avec l'Europe, notamment les pays non-européen de l'OCDE comme l'Australie, le Canada, le Mexique, la Nouvelle-Zélande, et les Etats-Unis. Les Etats-Unis étaient bien sûr les plus actifs, avec une situation en perpétuelle évolution : nous y avons étudié un ensemble représentatif de modèles de références. Les pays développés hors OCDE comprenaient l'Argentine, la Thaïlande, l'Afrique du Sud, et six pays du Moyen Orient.

7. L'expérience de projets plus anciens a montré que ce type d'étude globale était coûteux et *potentiellement* irréalisable dans les limites strictes des budgets du programme européen d'éducation et de formation tout au long de la vie (environ 500 000 €). C'est pourquoi POERUP s'est efforcé d'obtenir le meilleur rapport coût-efficacité pour l'Union Européenne. L'élément clé de notre stratégie a été de créer des partenariats informels avec d'autres projets et d'autres agences pour nous assurer que POERUP ne menait pas les mêmes études que d'autres agences pour certains pays. Cette stratégie s'est d'abord révélée chronophage et a entraîné des retards mineurs correspondant à l'attente de résultats en provenance d'autres agences. Cependant, les économies ainsi générées ont été significatives et nous ont même permis de mener POERUP à son terme. Ce processus de consultations a aussi eu des retombées positives, comme des collaborations régulières avec IPTS, UNESCO IITE Moscow, OER U/WikiEducator, CommOER/Wikipedia et OER Asia, ainsi qu'avec plusieurs experts indépendants. L'activité d'un groupe d'experts a même débouché sur trois ateliers très utiles sous l'égide du Comité Consultatif International.
8. Le premier cycle d'études s'est terminé en même temps que le rapport intermédiaire mais, en accord avec le plan de travail, une pause a été marquée pour intégrer une sélection d'études mises à jour en 2014. Ce processus de mise à jour a été un très bon exercice qui nous a permis de constater que certains pays –notamment l'Allemagne - réputés peu actifs en matière de REL étaient en fait devenus actifs au cours des 18 mois précédents. Toutes les initiatives sont consignées dans une vaste base de données et peuvent être présenté sous forme de **Carte des REL** consultable.
9. Grâce aux outils de l'analyse des réseaux sociaux, POERUP a permis de comprendre comment les *communautés REL* peuvent développer et stimuler l'activité sans recourir de manière soutenue à un financement à long terme des gouvernements. Huit études de cas de **Communautés REL** ont été sélectionnées parmi divers secteurs de l'éducation pour être analysées de manière plus ou moins approfondie par les partenaires de POERUP. Il s'agit des projets DigiSchool (en lien avec Wikiwijs, Pays Bas) et Bookinprogress (Italie), consacrés au primaire et au secondaire ; OER U (international), Futurelearn (Royaume-Uni) et BC Campus (Canada), consacrés à l'enseignement supérieur ; ALISON (Irlande) et Re:Source (Écosse) consacrés à la formation professionnelle, et un projet de MOOC spécifique

d’apprentissage informel pour adulte de l’Université d’Amsterdam. Les analyses ont débouché sur des options de politiques et sur une série de recommandations pour gérer efficacement ce type de projets dans le futur.

10. Le travail de POERUP sur les politiques a débuté rapidement (comme précisé dans le rapport intermédiaire), en lien étroit avec les discussions d’Opening Up Education. Trois rapports sur les politiques ont vu le jour à l’automne 2013, avec un résumé présenté à l’atelier de l’UE sur les REL pendant Online Educa en décembre 2013. En 2014, des documents spécifiques sur les politiques ont été produits pour cinq États membres (Royaume-Uni, Irlande, France, Pologne, et Pays-Bas) et pour le Canada. En plus du travail formel, des discussions informelles autour des politiques se sont tenues au cours d’ateliers dans cinq autres États membres : la Norvège, la Slovénie, la Hongrie, la Roumanie et la Croatie.
11. L’évaluateur interne de POERUP a effectué une série complète d’évaluations de POERUP, basée sur la pratique réflexive du personnel POERUP et sur la consultation des experts et des intervenants.
12. **Les projets futurs** des membres du consortium POERUP comprennent la participation à des projets dont certains ont déjà débuté, comme **VM-PASS, eMundus, SharedOER** et **D-TRANSFORM**. D’autres sont encore, au moment où nous écrivons, en cours de dépôt et d’évaluation. Certains types d’exploitation, notamment dans le domaine du wiki et des bases de données, sont actuellement en développement selon les opportunités.

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1. Project Objectives

The overall aim of POERUP was 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 ongoing economic situation in Europe the scope for government financial support for such activities is much less than it was in the past or is now in some non-EU countries such as US, Canada and Australia.

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

POERUP also wanted to provide education authorities, the research community and OER initiative management with *trustworthy* and *balanced* research results, in which feedback from all stakeholder groups had been incorporated and which was used as standard literature. A specific objective was to help readers in charge of OER initiatives to foresee hidden traps and to find ways of incorporating successful features of other initiatives.

POERUP was about dispassionate analysis, not lobbying – an issue where it strove to take a balanced view within an overall positive orientation, in respect of OER specifically, and opening up education, more generally.

POERUP aimed 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 initiatives (major and minor) and the diverse range of providers. The POERUP studies provided practical and concrete information in order to contribute towards a more informed approach in the future.

POERUP achieved this by:

- studying a range of countries in Europe and seen as relevant to Europe, in order to understand what OER activities and initiatives are under way, and why they are continuing (or stopping, or more starting) – and taking account of reports from other agencies and projects studying OER in other countries;
- researching case studies of the *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 POERUP and (the few) other policy-oriented studies, POERUP staff's own experience in related projects, and ongoing advice from other experts in the field.

Finally, these results were disseminated and are being maintained in a sustainable way. The project has a web site www.poerup.info and a wiki poerup.referata.com on which country reports and other outputs were developed. This wiki is still active and will be sustained well after the formal end of the project, as OER, under a Creative Commons license (CC 4.0). In addition various OER Maps have been developed – in particular www.poerup.org.uk – and will be maintained.

2. Project Approach

Country studies

The main 'intellectual' task in the first half of the POERUP project (2011-12) was to decide on which countries should be studied in depth in respect of their uses of OER and the contexts surrounding such uses. The project plan had pre-specified some countries, but it is always a good idea to recheck one's assumptions in a bid submitted nine months earlier. Having discussed the matter at length, the partners decided not to change the main countries studied, or to reallocate any country responsibilities between partners. This turned out to be a good decision during the first 18 months of the project.

The original 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 which countries to study. First, the 'low-hanging fruit' – countries with obvious OER – had already been put in the main list, thanks to substantial pre-bid researches by the team. Secondly, an early study to determine who across Europe could be 'an expert in OER' suitable for the POERUP International Advisory Committee had produced evidence that many European countries were not very active in OER. Thirdly, POERUP had made contact with other projects and agencies – including UNESCO, IITE Moscow and OER Asia – and it was clear that some of them had been commissioning country studies before POERUP had even started funded work. POERUP rapidly agreed with them that it would be a waste of overall resources to *duplicate* studies but since the other projects had started earlier, POERUP did a gap analysis to see which countries were *still* not covered. Fortunately for European coherence the situation was resolved amicably. So in September 2012 POERUP commissioned, via three of the partners, three sets of studies.

In the second half of the project, the change in workplan caused by the enforced withdrawal of one partner and the changing pattern of national activity in OER across Europe necessitated a reconsideration of where partner priorities lay in deciding which new countries to study and which existing country reports to update. The unspent subcontractor funds had been allocated to Sero and process of i) very meticulous hiring of cost-effective contractors and ii) leveraging on results from other projects allowed a substantial updating of many country reports and the creation of new reports, in particularly for Germany and Ireland.

The final list of countries studied is below. It includes over half of the EU-28, plus Norway (EEA), and in most cases two countries from each continent outside Europe.

Europe		*Non-Europe*	
Belgium	*... and*	Australia	*... and*
Denmark	Poland	New Zealand	Bahrain
Finland	Portugal	United States	Jordan
France	Romania	Canada	Kuwait
Germany	Spain		Oman
Greece	Sweden	Argentina	Qatar
Hungary	United Kingdom	Mexico	Saudi Arabia
Ireland			United Arab Emirates
Italy	Norway, EEA	Rwanda	

Netherlands		South Africa	Thailand

The report on each country can be found on the wiki under the country name – for example for Spain at poerup.referata.com/wiki/Spain.

In addition, four continental sweeps – Europe, Hispanic America, Asia and Commonwealth Africa – were done to try to collect OER initiatives from countries not specifically studied.

When analysing the country reports POERUP also looked at the existing country reports – from UNESCO Moscow on Brazil, China and Lithuania, and from OER Asia on several East Asian countries. (All these are referenced on the POERUP wiki.) Near the end of the POERUP project, key reports from eMundus (www.emundus-project.eu) became available – drawing on POERUP where relevant, they updated or confirmed existing POERUP material in some cases, but had up to date reports on Indonesia, Russia, and Brazil for POERUP to draw on for initiatives and policies – see e.g. wikieducator.org/Emundus/Brazil.

Case studies

The case studies work set out 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 (SNA) were used extensively in most of these case studies.

After considerable discussion, including with potential case study sites, eight case studies for **OER communities** were chosen across the various education sectors for analysis by POERUP partners, at varying degrees of depth (some described as mini case studies). Selection parameters included geographic and linguistic proximity to the POERUP case study partners (in UK, Netherlands, Italy and Canada) and coverage across the various educational sub-sectors (universities, schools, VET, informal).

The case studies were the schools-focussed projects Digischool (Netherlands, linked with Wikiwijs) and Bookinprogress (Italy); the HE-focussed projects OER U, Futurelearn (UK) and BC Campus (Canada); the VET-focussed ALISON (Ireland), Re:Source (Scotland) and a specific MOOC project in informal adult learning (University of Amsterdam). The analyses, available from the wiki or web site, led to a series of recommendations for effective running of such projects in future.

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 a very early approach to POERUP policy work was demonstrated in a multi-project OER workshop just before Online Educa Berlin in November 2012 – www.slideshare.net/pbacsich/oeb-oerwspoerupbacsich – and in some position papers to DG EAC. Further progress on policy in 2013 was delayed by the enforced withdrawal of the partner responsible for this task (SCIENTER), but once the replacement partner for the work was agreed (Sero), work restarted quickly. The later policy work was closely linked to discussions on Opening Up Education. Three EU-level policy reports were produced in autumn 2013 – the first in early September 2013 *before* Opening Up Education was released

and the other two soon afterwards. A summary of these was presented at the EU OER workshop just before the Online Educa conference in December 2013.

In 2014 specific policy documents were produced for five member states (France, Ireland, Netherlands, Poland, and UK – England, Scotland and Wales separately) plus Canada. In addition to formal policy work, informal policy discussions were held at workshops in five more member states: Sweden, Slovenia, Hungary, Romania and Croatia. In the Netherlands a series of 10 policy workshops were organized on different institutions of higher education to assist in formulating an open policy.

Dissemination and exploitation

Dissemination started early in the project's lifetime – in fact the POERUP wiki was running even before the POERUP bid was submitted and the first page with content on it appeared four days after bid submission. 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) so that non-trivial results could be disseminated, unusual for a project that early in its life. It also helped that there are several experts among POERUP partners who receive many invitations to conferences across the world. Notwithstanding, it was not until late 2012 that presentations began to take on a deeply researched aspect.

This 'more researched' series of presentations started with the OER13 conference in the UK in May 2013, the EDEN conference in June 2013 (Norway), the EIF (EFQUEL Innovation Forum) in September 2013 (Barcelona), the Online Educa Conference in Berlin and the Media & Learning conference in Brussels in December 2013; then in 2014 there were POERUP-related presentations at OCW14 (Slovenia, April), eLSE (Romania, April), Networked Learning (Scotland, April), OER14 (England, April), and LINQ/EFQUEL Innovation Forum (Crete, May) – culminating at EDEN (Croatia, June) with a workshop on policy issues and demonstrations of the POERUP OER databases and OER Maps. A particular feature of this set of presentations was the substantial involvement (four events including a panel on policy) at OCWC14, the annual conference of the US-based Open CourseWare Consortium (now called the Open Education Consortium).

Evaluation

The internal evaluator of POERUP, Deborah Arnold, completed a full series of evaluations of POERUP, not only a final report, but two interim reports also, based on reflections on their practice from POERUP staff, gathered by interviews, online evaluation surveys and activities during project meetings. In particular, during the second POERUP partner meeting (Granada, September 2012) a systematic review was done by the evaluator with all partners. This review facilitated the collective identification of areas for progress and actions to be taken in order to improve communication and mutual understanding of key project issues. The final year of internal evaluation focussed on impact, following the recommendations of the (external) evaluator of the POERUP Progress Report.

Project management

The POERUP project was quite long (32 months) and this means that the standard pattern of four project meetings in an LLP project was relatively widely spaced. There was a project meeting within two weeks of the project start (Leicester, November

2011) and then a second one in September 2012 (Granada). The third one took place at the end of March 2013 in UK, just before the OER13 conference. The fourth and final meeting was particularly crucial because of the need to discuss a substantial project amendment – this was a two-day meeting held in Brussels in December 2013. There was a long period from then until the end of the project (June 2014) but it was agreed that there would be not a formal partner meeting but monthly online partner meetings, culminating in a set of 1:1 meetings at the EDEN Zagreb conference in June 2014, where the main topic was how to complete the country reports and finalise the evaluation.

In between project meetings there were a number of online meetings, with a particularly significant and lengthy one in June 2012 and another such in January 2014 to ratify the amendment text.

3. Project Outcomes & Results

Country reports

Of the 33 country studies done by POERUP all are mounted on or linked from the POERUP wiki. In most cases, such as Poland, the page for the country OER study is the page for the country – thus poerup.referata.com/wiki/Poland – but in a few cases, it was more efficient to link the country page to a wiki page such as poerup.referata.com/wiki/OER_in_Mexico. A number of the country reports were written by senior academics in 'research paper' style with very full references – it was felt more useful (and fairer to the authors' intentions) to mount these as PDF files on the wiki. In some cases both were done – for example poerup.referata.com/wiki/Saudi_Arabia and the pages/reports linked to that.

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 country page from VISCED (the predecessor project to POERUP) *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 – virtualcampuses.eu/index.php/Thailand – which might be a key pointer to how pages can be updated now that the POERUP project has finished.

In February 2014 the country reports were reviewed for topicality and accuracy. Guidance was issued to partners and consultants were contracted to ensure that appropriate pages were updated. In addition, brand-new country reports were developed for Germany (poerup.referata.com/wiki/Germany) and Ireland – and two more (Rwanda and Jordan) were adapted from work done for another project on online learning which had been persuaded to produce these two under CC licenses.

A particular feature of the updates was the insistence that country reports were accompanied by tables of OER-related initiatives (including MOOCs) and also tables of relevant policies. These are all on or linked to the wiki. The policy-related tables were usually rather brief (see later).

OER initiatives: the Gazetteer

All OER and MOOC initiatives were consolidated on a database. This is still growing in the post-project phase, but at the date of this report the database had 501 initiatives. This number was over double the number collected by January 2013; indeed in the Progress Report POERUP noted: "the Gazetteer of OER initiatives... 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." The prediction then was that by the end of the project there will be over 350 entries". POERUP has substantially exceeded the prediction: this is partly due to the growth of MOOC sites but also to continued growth in size of the Open CourseWare consortium *and* continued growth in the number of countries engaged in OER, with countries like Bangladesh being recent entries. In fact there

has been a resurgence of OER activity in the last 12 months across the world, but often more at grass-roots level or with modest central funding rather than large government initiatives.

Initial conclusions on OER initiatives were presented at OER13 – www.medev.ac.uk/oer13/47/view/. These included:

- 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. Australia was then a laggard.
- 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.

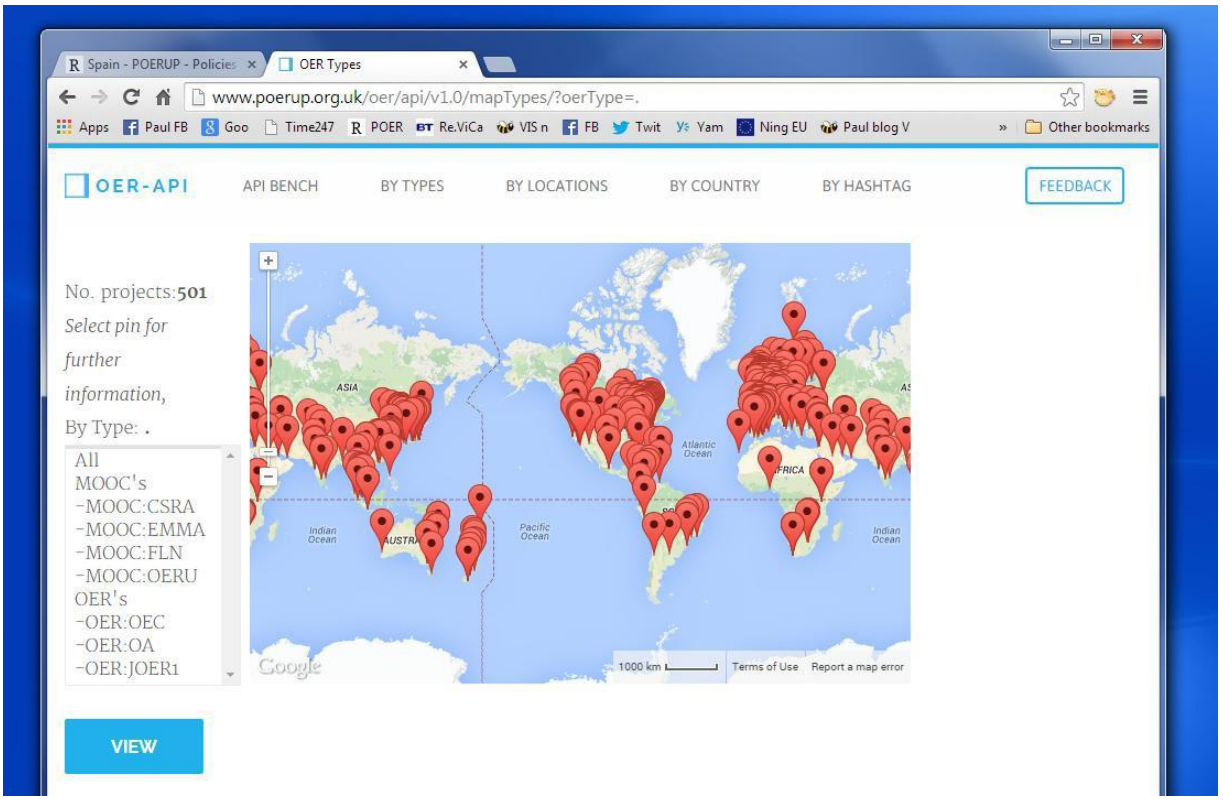
It is now possible to quantify and exemplify these statements in much more detail, given the vast increase in data we have, but we stand by most of the earlier conclusions. Recent studies also validate the project's decision early on to take a 'broad' view of OER – if a purist view of OER is taken, it 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.

The OER Map

By early 2013 POERUP had established a database format as a Word table for the collection of initiatives, and this is what was used for the table of notable initiatives in the Appendix of POERUP's *Report on Comparative Analysis of Transversal OER Initiatives*. In January 2014 this format was adapted and extended to fit the desire from several agencies and projects for a more geographic mapping-based representation of OER initiatives. The revised Word table below was used by POERUP staff and consultants in 2014 to create country-based tables of initiatives:

1. Accession Number (internal field) 2. Initiative hashtag (created by curator) 3. Type (e.g. OER, MOOC, Open Access) 4. Country (of HQ) 5. Region (within country, e.g. Flanders within Belgium) 6. Initiative HQ city (e.g. Brussels) 7. Initiative name 8. Initiative URL 9. Initiative summary (one paragraph) 10. Initiative owner (typically an institution like a university or school) 11. Initiative HQ address (postal address, but not PO Box numbers) 12. Geolocation (latitude, longitude – in decimal degrees – added at curation) 13. Initiative contact person	14. Initiative contact email 15. Political scale (e.g. institutional, regional, national, international) 16. Funders 17. Start year 18. End year 19. Educational Level (text) 20. Educational Level (ISCED 1997 taxonomy, e.g. 4) 21. Interface language(s) 22. Resource language(s) 23. Subject(s) 24. Licence(s) (e.g. Creative Commons of various types) 25. Media types (e.g. Text, Video) 26. Tags

The mapping system was developed in spring 2014 and first demonstrated publicly at EDEN in June 2014. It used the open source database MongoDB – http://www.mongodb.org. In addition to the fields mentioned above the database had various additional fields such as ISO codes for countries, regions and languages to facilitate data search, curation and validation. The database was loaded from a custom Excel database derived from the Word table. The use of Excel with look-up tables allowed substantial data validation at the curation stage. The database also was used to load a set of pages on the wiki, one for each initiative.



Case studies

The case study research set out to understand the ways in which *OER communities* can develop and foster activity without sustained long-term government funding. The research used a mix of both quantitative and qualitative methods: a survey based on Social Network Analysis techniques and for each case study, three in-depth structured interviews were conducted, resulting in 18 interviews. From the inventory (Deliverable 2.3), compiled by the POERUP project, eight case studies were selected: seven in Europe and one from Canada. The case studies are defined as notable initiatives in Open Educational Practices (defined as the set of activities and support around the creation, use and repurposing of Open Educational Resources and MOOCs). Selection criteria for the cases were: inclusion of primary, secondary, higher education and vocational training, both long-standing and new initiatives, easy access to respondents through partner contacts, and both national and international initiatives. In addition to the major cases, two mini-case studies were also added to the list, to increase the range of topics covered.

Each case study has a page on the wiki that links to the detailed report – for example poerup.referata.com/wiki/ALISON_-_case_study

Pen-pictures of these case studies follow:

1. **Digischool** is a national initiative in the Netherlands that was started by two teachers in 1995 and resulted in a collection of 'virtual schools' where primary and secondary teachers can share open learning materials In 2000 they also added an online platform to enable teachers to discuss the use of the open learning materials in virtual communities. Around 70 teachers manage the virtual communities (www.digischool.nl). The initiative is closely linked with another Dutch OER initiative, Wikiwijs.
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. (In the final report on the case studies this was treated as a mini-case study, as Scienter did not complete this before their enforced withdrawsal from the project)
3. The **OERu** (OER universitas) is an international initiative of the Open Educational Resource Foundation, based in New Zealand, set up in 2011, with the aim of widening participation in higher education by accrediting OER-based learning. The OERu is a consortium of over 30 public post-secondary institutions (oeru.org). Alongside the consortium, OERu is enhanced by a system of volunteers (wikieducator.org/OERu/Home).
4. **FutureLearn** is a private company fully owned by the UK Open University (www.futurelearn.com). It has partnered with over 20 leading UK universities and an increasing number of non-UK universities to form the FutureLearn consortium. Since October 2013 the consortium has offered a range of MOOCs focused on informal learning in a variety of subjects typically taught at university level. In addition to partnering with universities, FutureLearn has partnered with three UK institutions with massive archives of cultural and educational material.
5. **BCcampus** is a publicly funded organization in Canada (bccampus.ca) that aims to bring together British Columbia's post-secondary system and make higher education available to everyone through the use of collaborative information technology services. BCcampus was established in 2002 by the provincial government to provide British Columbia learners, educators and administrators with a web-based portal to online learning programs and services across the B.C. post-secondary system. Within this study POERUP investigated the *open education subgroup* of the BCcampus project.
6. **ALISON,** from its start in 2007, has now signed up more than five million students to more than 500 online courses (alison.com). It is adding another 200,000 each month and its founder is confident that this expansion could accelerate even more and reach "a billion students" towards the end of the decade. Based in Ireland, it is the VET equivalent to the Khan Academy in the US. The 600 courses on offer range from touch typing, to English grammar to Diplomas in Business and Finance. ALISON, which has never received public funding, seems to have sound financial prospects.
7. **Re:Source** is an initiative of the Scottish Further Education Unit aimed at developing OER for Scotland's colleges (resource.blogs.scotcol.ac.uk). The initial development work took place during 2012 and it is currently managed by

the (Scotland) College Development Network. All resources, with a few exceptions, are held under a Creative Commons 3.0 Unported licence.

8. ***Introduction to Communication Science***, the first MOOC (Massive Open Online Course) in the Netherlands, is an initiative of the University of Amsterdam's College of Communication and the Graduate School of Communication Science (mooc.uva.nl/portal). It was first conducted in 2013 and has also been run in 2014. The target group consists of college students and lifelong learners all over the world.

The research outcomes were summarised in an extensive research article *An investigation into social learning activities by practitioners in open educational practices*, now available in the online IRRODL journal, at www.irrodl.org/index.php/irrodl/article/view/1905. The outcomes include a number of recommendations to facilitate the sustainability of community-driven OER developments. Of these the most important are the following:

1. Open Educational Practices (OEP) communities need different social configurations to serve different goals. However, the following organizational model is seen by many initiatives as a wise choice: a combination of strong institutional teams, open networks of practice and a stable community.
2. The initiative behind the community should be driven by a central and a highly charismatic and energetic coordinator or a strong core team.
3. The core team within the community should have excellent expertise in the creation of open educational resources and the ability to apply their expertise.
4. Even if the community is completely online and not connected with institutions formally, the community should seek connections with institutional partners. Such partners can serve as a bridge to the wider world of OER: translating knowledge from this to the community, along with the practical implications.
5. Communities should try to build further on, or seek support from, an *already existing* international, national, or regional strong community in the field of e-learning, blended learning, or similar area. These existing strong communities are often the driver for innovation and already established relationships make it easier to share knowledge and organize events. The community also has the opportunity to leverage on expertise from a longer lasting research group.
6. Communities should organize face-to-face workshops or conferences once a year to bring partner institutions together: during these face-to-face workshops participants build up a shared identity and share their practices. When the network is established and personal relations are created, *then* participants will use online technology to share knowledge about the use of OER.
7. Teachers and academic staff are still reluctant to share because of lack of knowledge about copyright issues. Clear guidelines and the organization of training workshops around copyright and licensing are crucial.
8. Community leaders should not underestimate the issue of time for most staff. Creating online learning materials takes time. This will stay the biggest constraint for teachers and academic staff.
9. If institutional support is not possible, community leaders should consider incentives for individual contributors.

POERUP has also presented to research conferences on the theory of Social Network Analysis that underpins the case study work, for example to the *Networked Learning* conference in April 2014 – www.networkedlearningconference.org.uk/abstracts/pdf/schreurs.pdf.

Policy recommendations

In the original POERUP bid it was planned that POERUP would not enter the policy domain until the second half of the project. However for various reasons POERUP was propelled into the policy area much earlier. 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. POERUP representatives from Sero, Athabasca, OUNL and SCIENTER were approved to attend: they distributed POERUP leaflets, and met representatives from many other OER analytic projects active round the world, all at minimal cost to POERUP. The Paris meeting was best known for the release of the Declaration – approved on 22 June 2012 – and by 6 July 2012 a version of this, appropriate for benchmarking countries' progress towards OER, was released on the POERUP wiki – poerup.referata.com/wiki/2012_Paris_OER_Declaration_as_benchmark.

Secondly, the European Commission in spring 2012 had issued invitations to various experts, including from POERUP partners Sero, OUNL, EDEN and SCIENTER, to join a new *Open Education Experts Group* and make contributions. A vast amount of inputs and position papers were produced, of which some were released later via the *elearningeuropa* portal. In particular Paul Bacsich 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. Coupled with the policy work in VISCED this policy strand led in late 2012 to a presentation *Enabling legislation to support OEP: a realistic view from POERUP* to a multi-project workshop on OER at Online Educa 2012 – see www.slideshare.net/pbacsich/oeb-oerwspoerupbacsich.

In early 2013 the policy writing activity was due to start, but by April 2013 it was clear to other partners that the POERUP partner responsible for policy (SCIENTER) was in difficulty, and after a long-drawn out process, during which they did no work despite promises, they agreed to withdraw from POERUP with effect from 31July 2013. An informal agreement was made between partners and discussed with the LLP office (EACEA) as to how to proceed and so policy work restarted – but it was not until February 2014 that the formal amendment could be processed. Notwithstanding that, Sero took over policy work and by mid September 2013 draft proposals on OER policy for Higher Education and VET were produced, with the first version of the schools policy recommendations coming soon afterwards. These then went through a long process of discussion and refinement, both with partners and with external advisors before being finalised in June 2014.

In contrast to the recommendations from the EU for *Opening Up Education*, which are cross-sectoral, the POERUP recommendations come in three flavours: for schools (K-12, ISCED levels 1-3), Vocational Education and Training (VET, ISCED level 4) and higher education (HE, ISCED levels 5 and upwards). There are advantages in having a version per sector: the language can be sector-specific and the particular obsessions of the sector (e.g. infrastructure for schools; quality regimes for HE) can be given due weight; on the other hand it does make them hard to

summarise in a short space. To cut through this conundrum this Final Report focusses on the VET sector (ISCED 4), which partakes in many ways of both the opportunities and problems of the adjacent sectors.

The VET policy report makes recommendations in nine areas: communication and awareness raising; funding; copyright and licensing issues; reducing regulatory barriers; quality issues; teacher training and continuous professional development; certification and accreditation; infrastructure issues; and further research into models for sustainable OER. Together, these policy recommendations can further the acceptance of OER in vocational education and training through:

- Stimulating their supply, through encouraging bottom-up production/assembly of OER; encouraging publishers and other content owners to make them open access; encouraging institutional actors to set up open access repositories of learning resources and study programmes.
- Stimulating demand, through encouraging and funding research into open learning outcomes; awareness campaigns for individuals, teachers and trainers; public commitment, declarations (putting teeth into the UNESCO declaration); norms legitimising a European OER/OEP/licensing framework.
- Support for market functioning and transparency, through Directives for recognition of learning outcomes and international agreements.
- Stimulating knowledge development through the establishment of a quality association and quality assurance body; training teachers, lecturers and work-based trainers, both through initial training and CPD.

The schools policy document puts a stronger emphasis on infrastructure and repositories; the higher education one puts a stronger emphasis on alternative modes of provision, the international context (including beyond Europe) and the need for perpetual innovation in teaching methods to raise quality and lower system costs.

In parallel, but somewhat later, a search took place to determine what policies of relevance to OER there were in other countries relevant to EU. The original OER country reports had found little evidence of national policies except in the US, despite the optimistic statements being made in international circles and the 'policies' in the OER Policy Registry (wiki.creativecommons.org/OER_Policy_Registry). Thus when it came time in early 2014 to update country reports and produce lists of OER initiatives, POERUP decided to extend the analysts' task by asking them also to produce lists of OER policies. On the whole they found it hard to come up with much, but POERUP did find evidence from a number of countries that OER policy was again on the agenda. As the POERUP report on the topic stated:

> "Only a minority of EU countries have any national OER policies and where these exist they are often limited to open access to publicly funded research. This is largely true of countries outside Europe: the USA is an exception, with many national policies, but these tend to be limited in scope because of the organisation and control of state education systems, particularly schools.
>
> There are substantial numbers of policies about 'open' education at institutional level, especially in higher education. However, there are relatively few policies in the schools sector and almost none in the VET sector. Few policies refer directly to OER, both at national and institutional level, but there is an increasing number of national declarations on open access and OER. However, most of these have

yet to be translated into policies. The UNESCO Paris declaration of 2012 is often taken as a starting point for national declarations: this has both the virtue and drawback of being very generalised in its approach."

The POERUP investigations and feedback from policy experts at workshops led to some interesting discussions on the difference between policy and practice and the dynamics of the relationship. POERUP noted: "Whilst direct action by practitioners at the grassroots is key to changing practice in all sectors, the development and implementation of policies at national level is important in both legitimising grassroots movements and providing leverage – potentially through funding – for longer term change."

The **national policy documents** (for certain EU member states and Canada) required careful timing – if written too early, POERUP could have been accused of ignoring developments under the surface; if written too late, POERUP could have been accused of just 'copying' national recommendations, or (maybe worse) 'criticising' them. The project resolved the balancing act by keeping closely in touch with policy-informed people and developments in the relevant countries.

In Netherlands and Poland a somewhat stable situation was reached earlier, so these two policy documents could go ahead. (Netherlands had made a major policy change from OER in schools to MOOCs in HE when the government decided to close Wikiwijs in its original form from the end of 2013.)

The situation in France remained complex, but POERUP's French partner kept closely in touch with policy circles. Timing was crucial, with the French government adopting the national digital roadmap for youth, schools and universities in February 2013 and the subsequent launch of France Université Numérique (FUN) and the Digital Agenda for Higher Education in March 2013, and the official launch of the FUN MOOC platform. The law on Higher Education and Research passed in July 2013 make the provision of digital education a legal requirement for higher education for the first time. With respect to OER, one of the effects of the focus on MOOCs within FUN was the emergence of new dynamics within the existing ODL and Digital Thematic University communities.

Canada surprised many outsiders when three provincial governments came to a meeting of minds on OER and this allowed the Canada policy document to stabilise.

With regard to the UK, Wales was the first of the four UK nations to produce approved policy recommendations (www.hew.ac.uk/oer-wales-cymru-a-small-nation-with-big-ideas/), even if these were approved just for higher education – but there were proposals covering the other sectors from a government-appointed working group. In Scotland there was an active Open Scotland group who produced a Scottish Open Education Declaration (openscot.wordpress.com). The Scottish government had more pressing matters on its plate with the Referendum, but POERUP kept closely in touch with the Open Scotland group and this allowed a sensible document to be produced. In England there had been some useful papers commissioned by government, especially on MOOCs for HE, and there was the beginnings of a rebirth of policy for ICT in education with the FELTAG report and the ETAG group (feltag.org.uk/etag/); yet a report from the Higher Education Academy on flexible learning (which could be construed as 'Opening Up Education' in the UK sense) contained only very tentative recommendations and made no reference to OER. Fortunately discussions over many months had made it clear what *institutions*

would accept and this provided the basis on which POERUP mapped the EU-level recommendations to the England context.

Dissemination

There have been over 30 presentations at events, mainly international ones, where POERUP has been presented or featured in a significant way. Listed below are the presentations which featured *substantial analytical conclusions* from the project (thus all presentations in 2012 have been omitted).

Date and city	*Event*	*Presenters*	*Titles*
26-27 March 2013 England: Nottingham	OER13	Bacsich, Nie, Witthaus, Bacsich and Karran	An elevator pitch world tour of OER countries from A to Z OER in Mexico, in the context of Hispanic America – implications for Europe
12-15 June 2013 Norway: Oslo	EDEN	Schreurs	How to Power-up Communities behind OER Initiatives
24-26 September 2013 Spain: Barcelona	EFQUEL Innovation Forum	Pepler	POERUP – draft policy recommendations for HE and VET
4-6 December 2013 Germany: Berlin, Pre-conference event	Online Educa, EU OER workshop	Bacsich	Policies for OER Uptake for the post-secondary education sectors: with emphasis on Member States
12-13 December 2013 Belgium: Brussels	Media and Learning	Pepler	Policy recommendations for the use of Open Educational (Media) Resources in Europe
7-9 April 2014 Scotland: Edinburgh	Networked Learning	Prinsen	Investigating the social configuration of a community to understand how networked learning activities take place: The OERu case study
23-25 April Romania: Bucharest	International Workshop on OER and MOOCs, eLSE	Pepler (keynote)	Developing policies to stimulate the uptake of OER in Europe
23-25 April 2014 Slovenia: Ljubljana	OCW14	Bacsich Bacsich Bacsich (chair), McGreal, Mulder et al Schuwer et al	POERUP – Policies for OER Uptake The POERUP external evaluation of the FutureLearn community National and International policies in OER Supporting Open Education Policy Making by Higher Education Institutions in The Netherlands; lessons learned
28-29 April 2014 Newcastle: England	OER14	Jeans Bacsich Bacsich and Pepler	Case study on ALISON Proposed policies to foster open educational resources and practices in UK higher education A DIY kit for policy for policy formulation for OER in HE and FE (workshop)
7-9 May 2014	EFQUEL/LINQ	McGreal and	Conversations with POERUP: What can

Date and city	*Event*	*Presenters*	*Titles*
Greece: Crete	Innovation Forum	Bacsich	insights from *outside* Europe bring to Europe in respect of opening up European universities to educational innovation?
10-13 June 2014 Croatia: Zagreb	EDEN	Bacsich and Pepler	Initiatives and Policies for OER Uptake (POERUP) – The Final Stocktake

By deliberate design and selection of speaking opportunities POERUP managed to favour eastern and southern EU member states in the last 12 months, where POERUP knew that OER was much less prevalent.

In addition a number of journal papers and book chapters have been produced:

Bacsich, P. and Pepler, G. "Learner Use of Online Content: implications for teachers", in *Teaching and Learning On-line: New pedagogies for new technologies,* Routledge, 2013.

Pepler, G. (a book chapter, submitted after the eLSE conference) "Developing policies to stimulate the uptake of OER in Europe".

Schreurs, B. et al, "An investigation into social learning activities by practitioners in open educational practices", IRRODL Vol. 15, no. 4, 2014.

More papers are in preparation for release after the funded period ends (section 5).

POERUP did not restrict itself to face-to-face events. A number of virtual conference events (webinars) have been done by POERUP, in particular two by Paul Bacsich jointly with other OER experts:

- 24 May 2013, with a focus on policy issues on Wales: *Open Educational Resources and Practices: moving forwards, looking outwards*: led by Paul Bacsich (Sero) and Lou McGill (OER expert from Scotland): the merged presentation is on the JSC RSC Wales site at moodle.rsc-wales.ac.uk/pluginfile.php/6966/mod_resource/content/2/Slideshow%20from%2024.05.13%20pdf.pdf
- 23 June 2014: *Institutional Open Education and OER Policies*, led by Paul Bacsich (Sero) and Terese Bird (University of Leicester); Paul's presentation is at www.slideshare.net/pbacsich/alt-policiesbacsichjune2014 – this was the last presentation during the funded phase of POERUP

Exploitation (during the project)

In **Sero**, strong links have been developed with relevant entities in the devolved administrations, such as JISC RSC and Hwb in Wales; SQA, Re:Source and the Open University in Scotland. This has made it feasible to write 'grounded' policy documents for both these countries.

In England, there is now little activity in schools OER. In contrast, in UK universities online distance learning is growing fast and MOOCs are active – and not only in FutureLearn. Through its wider interests, Sero remains well-connected at senior levels in both library and e-learning circles in universities across the UK and in fact now has a specific consultancy arm SeroHE (www.serohe.co.uk/) involving senior associate members including former Rectors. Paul Bacsich has recently consulted for the Higher Education Academy in connection with flexible learning and has been

in close contact with a number of leading providers of online learning and MOOCs, active in the UK, including several members of FutureLearn.

At **OUNL**, the lead department for POERUP was closely related to the Dutch Government. OUNL, via Fred Mulder in particular, have integrated results from POERUP in their communication with the Dutch government and discussed implications at the policy level. OUNL was also closely involved in the Wikiwijs project until that ceased at the end of 2013.

The **University of Lorraine** has meetings several times each year at the Ministry, with which key POERUP staff have close links. The University has already presented POERUP project several times in Ministry circles. It is closely involved with *France Université Numérique* (FUN), an online learning programme with a MOOCs aspect.

Athabasca University has 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 Provinces.

The **University of Leicester** has 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 have been presented at numerous keynotes given by Gráinne Conole, including in: Iceland, Sweden, Denmark, Ireland, New Zealand, South Africa, Spain, and Germany**.**

EDEN ran an effective policy-related workshop, as part of its 'Synergy' event, in October 2013 in Budapest with senior Hungarian experts on Hungary's position within the EU in terms of Opening Up Education. A follow-up 'Synergy' strand, in which POERUP was represented, was run at the EDEN annual conference in Zagreb, Croatia (June 2014).

SCIENTER, the POERUP Italian partner, had to withdraw from the POERUP project after a long period of heading into bankruptcy. They had earlier reported for the Progress Report that "the economic and political crisis affecting Italy has caused a strong decrease in the investment in education and innovation and this has worsened an already critical situation as concerns the promotion of OER in Italy, which was already very weak before the crisis reached its peak in 2011/2012." Indeed, this was no doubt an issue in the bankruptcy. Interestingly, POERUP's consultancy study on Italy which reported in June 2014 indicated that some older OER initiatives such as BookInProgress were still active and there were new MOOC/ OER developments – see poerup.referata.com/w/images/Open_Education_Initiatives_in_Italy.pdf

International Advisory Committee

There is a considerable overlap between OER policy and wider e-learning policy. In particular POERUP benefited from the VISCED International Advisory Committee (IAC) which met just before Online Educa 2012 in November The links are now much clearer to others thanks to the EU's *Opening Up Education* announcements.

The first Advisory Committee workshop specifically for POERUP took place at OER13 in Nottingham in March 2013.The second IAC workshop was at the EDEN conference, Oslo, June 2013. The final IAC workshop took place during the Media

and Learning conference in Brussels, December 2013 and was positioned to draw on the views and expertise of schools, Ministry and media experts. IAC members have made significant contributions to the methods the project uses to classify initiatives and have brought several initiatives to the project's attention, often providing the background information not easily available from desk research. In addition to the IAC workshops and the team of consultants, POERUP also has a growing worldwide network of advisors whom the project consults on an informal basis, most recently in connection with minor updates of country reports and lists of initiatives.

Evaluation

The POERUP evaluator Deborah Arnold completed the final evaluation in June 2014, based on a final round of consultations with and questionnaires to partner staff, consultants and IAC members, and drawing on the two annual interim evaluations run respectively in September 2012 and November 2013.

The evaluator observed that "the main activities planned have been carried out, the deliverables are consistent with the work plan and any adjustments have been duly justified by the project team members", and also that "In conclusion, it can be said that POERUP has achieved its aims, despite the numerous challenges the project had to overcome".

In more detail:

> POERUP was an ambitious project, in terms of its scope and the sometimes sensitive and frequently changing area of educational policy. The project faced a number of challenges, not least the different working cultures and expectations of partners in terms of leadership and internal communication. Further challenges on the management side included having to deal with the impact of bankruptcy of one partner, institutional restructuring within another and delays in resolving contractual and financial issues. The partnership was well aware of these difficulties and took steps to address them, although some, such as the attention to different working cultures and the integration of new partners, could have been dealt with more explicitly and from the outset. While the unforeseen activities did take up a great deal of time and effort, in particular from the coordinator, the project managed to stay on track and deliver highly satisfactory results.
>
> Some of these actually go beyond what the initial work plan promised, such as the data visualisation of OER initiatives and policies around the world... Reactions to the data visualisation map during its first public showing at the EDEN 2014 Annual Conference in Zagreb would suggest that this addition is more than cosmetic and could encourage further engagement with the question of OER policy and initiatives as stakeholders from outside the project come forward with their own contributions. This thus provides an opportunity for POERUP to continue exploiting results after the project lifetime, on condition that the wiki be suitably maintained for a sufficient period. It is the evaluator's understanding that such mechanisms and commitment are in place.

For more details see poerup.referata.com/wiki/D7.3_Final_Evaluation_report

4. Partnerships

Within the consortium

POERUP at its start had seven partners and at its end had six. They came from five countries: four across Europe (UK, France, Netherlands and Hungary) as well as Canada. Countries covered large- and medium-population ones and four EU languages. Their political systems were different – and fluid. For two (UK and Canada), education is devolved to semi-autonomous regions, some (like Scotland and Wales) being similar in size to many small EU countries; for the other two, education is organised centrally. This allowed POERUP to gain a range of perspectives on educational issues.

The partners came from different parts of the educational and institutional universe. There were four universities, one research-based SME (Sero) and one network/membership organisation (EDEN).

Staff within the partners consisted of university professors/academics, consultants, and business people – one was 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 had worked together in the past; others are now working together on other projects: e.g. Sero and EDEN on ODS: Open Discovery Space – www.opendiscoveryspace.eu; Leicester and Athabasca on eMundus – wikieducator.org/Emundus/Home; and Leicester and EDEN on VM-PASS – vmpass.eu/the-project/partners/.

With other projects

POERUP has formed close links with IPTS, UNESCO IITE Moscow, WikiEducator and Nordic OER. Collaboration with these and others 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 'archetypes' paper – iite.unesco.org/files/policy_briefs/pdf/en/alternative_models.pdf. Contacts with Nordic OER were useful in the updating of Nordic country reports.

Paul Bacsich was on the Advisory Committee to the IPTS-funded project OER4Adults (oer4adults.org/advisory-group/) – closing another gap since POERUP was not mandated to research OER in adult education – and is now on the Advisory Committee for LangOER – langoer.eun.org, ensuring that language needs remain highly visible in POERUP thinking.

Consultants

The consultants that POERUP used have come from Croatia, Spain, Greece, Italy, Norway, Poland, Portugal, Romania, Germany and the UK. Several consultants have work experience in or were originally from a wider range of countries including Mexico, South Africa, Thailand and the Gulf States.

International Advisory Committee

The IAC workshop participants came from Brazil, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Norway, Poland, Romania, Spain, Spain, Sweden, Turkey, United Kingdom and the United States.

Volunteers

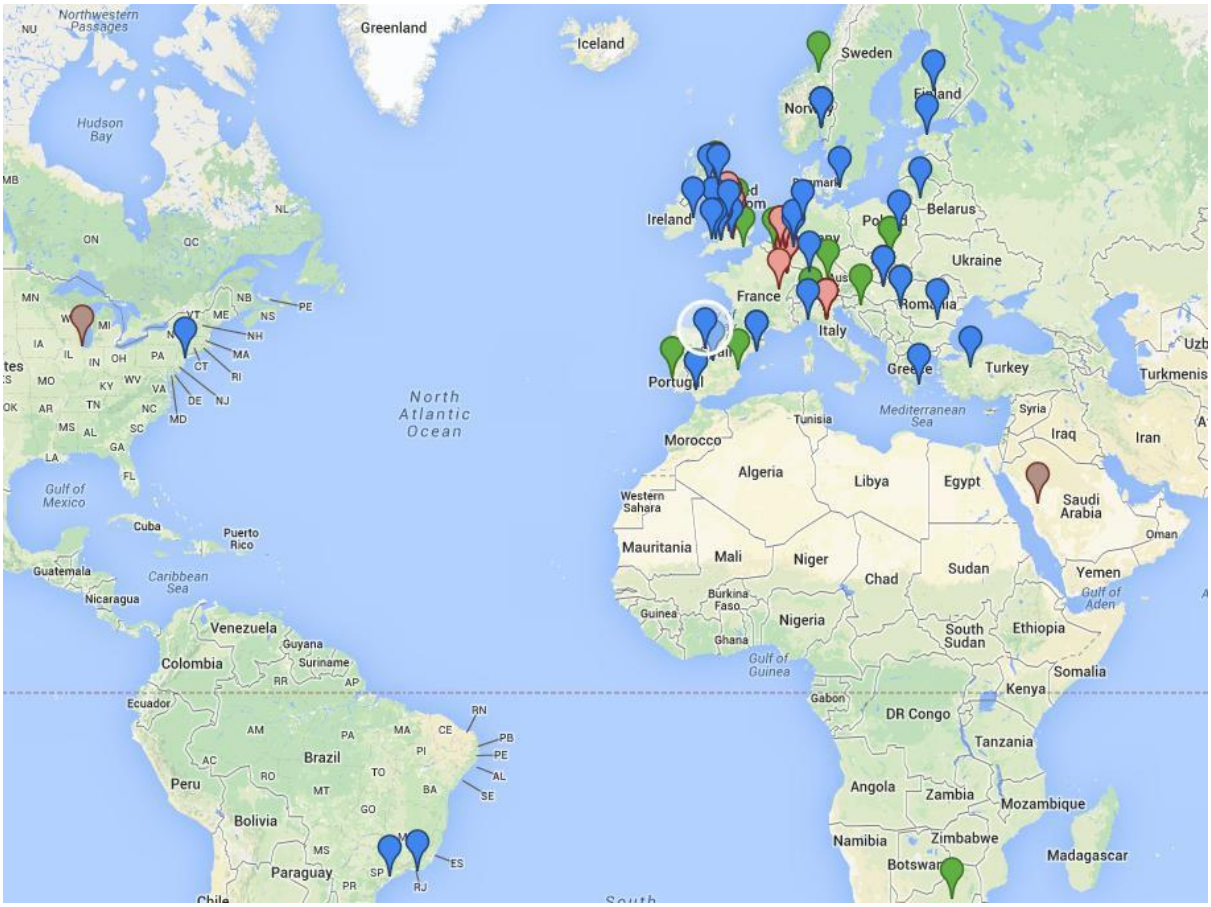
POERUP is particularly grateful to the Saudi Arabian PhD student Manal AlMarwani who provided a thorough country report on Saudi Arabia and also reports on Bahrain and Kuwait. We wish her well in her PhD studies at the University of Lincoln, UK.

Outreach to the world beyond Europe

The project's Canadian partner had 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 including several of specific relevance to POERUP. Prof McGreal is of course a key part of the UNESCO OER Chairs network and was assiduous in promoting POERUP in his presentations – e.g. to OER Sweden in February 2013 – oersverige.se/open-education-a-global-challenge/

Within Europe, Paul Bacsich and Professor Gráinne Conole also gave many international speeches; they went also on study trips in New Zealand and Australia respectively, as well as shorter trips to US, Brazil, India and South Africa, on all of which they met OER experts and policy advisors. This outreach included links not only to institutions and government agencies but also to private providers active in this space, and venture funds in the US, EU and India.

POERUP wishes to celebrate and recognise all its staff, consultants, IAC members, volunteers and other advisors in its map *People of POERUP*, available at mapsengine.google.com/map/u/1/edit?mid=zYG2prGO09jE.khf-Wyot-Zeo



5. Plans for the Future

Continued work on OER and MOOCs

The six active partners in POERUP are all continuing their work on OER and MOOCs in various ways, and in all this work will of course leverage on the knowledge gained in POERUP, on specific projects as follows:

eMundus (www.emundus-project.eu/) is an initiative supported by the European Commission which wants to to strengthen cooperation and awareness among Higher Education Institutions worldwide by exploring the potential of Open Approaches (e.g. OER, MOOCs and Virtual Mobility) to support long term, balanced, inter-cultural academic partnership for improving learning and teaching through Open Education approaches.

VM-PASS (vmpass.eu/the-project/) aims to increase inter-institutional recognition of virtual mobility and OCW-based courses, by:

- Building on results from the OERTest project and piloting the use of a student-held learning passport to facilitate recognition & mobility
- Planning, testing and creating a recognition-clearing house to support the verification and investigation of learning passports
- Creating a typology of quality systems used in VM and OER systems, to support the learning passports and recognition-clearinghouse

SharedOER is a study contract in progress by Sero for IPTS. Its aim is to make an inventory of the existing cases within the context of formal education where a core curriculum/syllabus is shared across borders (e.g. state, national, linguistic and cultural). The study aims to locate relevant initiatives and organisations, describe what they are working on and what have they achieved. A key focus of the study is the Common Core State Standards initiative in the US, in order to understand the impact that this has on the production, reuse and dissemination of OER. The study's aim is a 'mapping' of the study area in order to better understand the drivers and hurdles that a common syllabus/core curriculum could have on the uptake of OER in the European Union. The work leverages on the database of OER initiatives built up by POERUP as well as wider work by Sero on ICT in schools and higher education.

SEQUENT is a consortium of EADTU and EFQUEL with ENQA. Sero is a subcontractor to EFQUEL. The project aims to promote excellence in the use of ICT in higher education via a focus on quality in e-learning, with a clear goal to prepare European Universities in line with the European Modernization Agenda and to make higher education in Europe fit better to cross-border collaboration initiatives in the implementation of innovative and ICT-enhanced partnerships, within the context of Opening Up Education. The work leverages on the POERUP database of MOOC initiatives from EU actors as well as wider work by Sero staff on quality and benchmarking e-learning, and work on the identification of universities who are innovative in their use of ICT including (but not only) OER and MOOCs. The so-called *Declaration of Panormo* by EADTU/EFQUEL was drafted by POERUP staff and former staff in June 2014 and drew heavily on the POERUP HE OER policy paper. In particular Recommendation 2 of the Declaration states: "The relevant agencies should recommend to universities within EHEA that they should to improve and proceduralise their activity on credit transfer and APL (Accreditation of Prior

Learning) including the ability to accredit knowledge and competences developed through online study and informal learning (including but not restricted to OER and MOOCs), by such national, shared and collaborative arrangements as universities see fit to use."

Outside these projects, the partner exploitation approaches are as follows (for more detail see Deliverable 6.2):

- 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. Although the Institute of Learning Innovation is closing and specific ILI staff (including Professor Conole) are leaving, the University is continuing 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 at the time of writing and will be delivered in the autumn.). The University is also continuing to manage the OER-related LLP projects it has in its portfolio.
- **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. Projects including SharedOER, SEQUENT and D-TRANSFORM are already leveraging on POERUP. Paul Bacsich has already participated in national bid review panels in the UK and in Ireland which are judging projects with OER aspects and is thus using POERUP expertise.
- **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 staying on, in other departments, including Bieke Schreurs, the lead researcher on the case study work.
- **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 justifyable analysis and validation.EDEN's contribution will come from its regular activities focussed 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.

- The **University of Lorraine** is an active partner in the FUN initiative and plays a key role in the new Erasmus+ D-TRANSFORM project on leadership development in open online learning (Sero and EDEN are also involved).
- **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)

Dissemination

The following conferences from September 2014 will have specifically POERUP-related activity:

1. SMART (Social Media in Academia: Research and Teaching), Universitatea de Vest din Timișoara, Romania,18-21 September 2014: paper on 'Opening up Education in Romania' presented jointly by Giles Pepler (Sero) and Carmen Holotescu (Universitatea de Timișoara and one of the POERUP consultants) – soon to be be published by Medimond S.r.l. - Monduzzi Editore International Proceedings Division - a leading international scientific academic publisher based in Bologna (Italy). ICDE/LangOER workshop on OER in less used languages, Oslo,14 October. Paul Bacsich is an invited guest to this workshop.
2. The EDEN Research Workshop in Oxford on 27-28 October 2014 has strong POERUP-related aspects including a keynote contribution by Professor Rory McGreal.
3. European Quality Assurance Forum, Barcelona, Catalonia, 13-15 November 2013. Paul Bacsich will lead one of the EADTU/EFQUEL workshops on "quality in innovative higher education".
4. Online Educa Berlin, Germany, 3-5 December 2014: the 20th anniversary of this conference. Paul Bacsich is speaking on "Mapping OER, MOOCs, Open Education and Other Kinds of E-Learning" in a session chaired by ICDE, the International Council on Distance Education, entitled "Supporting Open Education 2.0 – What, Why and Where?"
5. Open Educational Resources: impact and outcomes, Paris, 8-9 December 2014. Paul Bacsich will speak on the business case for OER. Rory McGreal will also be speaking and the University of Lorraine are central to the arrangements.
6. Open Education, Banff, Alberta, 24-25 April 2015: this is the most obvious location at which to speak about the global OER Map developed by POERUP and Paul Bacsich intends to submit a paper based on his mapping annex to Deliverable 2.2.
7. OER15, Cardiff, Wales, 14-15 April 2015: Paul Bacsich is on the Steering Committee and has many links to Welsh institutions: it is expected that there will be a Wales-relevant POERUP paper presented as well as at least one more general paper.
8. EDEN, June 2015. It is a little early to plan but it is very likely that some POERUP people will speak on POERUP topics.

Exploitation Working Group and Partner Agreement

The Exploitation Working Group did not have separate meetings but Exploitation was usually an agenda item in partner meetings. In particular there was a lengthy discussion of initial ideas at Partner Meeting 2 (Granada, September 2012), a review at Partner Meeting 3 (Nottingham, March 2013) and updating discussions at Partner Meeting 4 (Brussels, December 2013) and the online meetings in September and November 2013 leading up to that, culminating in a lengthy review at the online meeting in June 2014. Thus a clear view was formed. At the end of the project in June 2014, the following was agreed between partners in terms of exploitation:

1. 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 rather little private intellectual property.
2. The nature of European education (especially 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 not useful.
3. 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 www.poerup.info web site 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.referata.com wiki site for a period of **two years** from 1 July 2014. (The site is free to host *provided* it remains actively edited.)
3. **Sero** will maintain the www.poerup.org.uk OER map site for a period of **18 months** from 1 July 2014. (Hosting costs would come from other sources.)
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 OER and MOOC 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 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, including the user community around the Re.ViCa/VISCED wiki hosted by KU Leuven.The Semantic Search and Semantic Map features are of great value in the POERUP wiki but are not currently available in WikiEducator, or indeed the Re.ViCa/VISCED wiki or Wikipedia. Consequently the preferred direction of travel is for the POERUP

wiki to *import* sections of these other wikis. (Already many of the Virtual Campus and Virtual School entries from the Re.ViCa wiki have been automatically imported.) Whatever the outcome of these discussions, poerup.referata.com would be functional until at least 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. Though information is not yet public it is expected that the Hewlett Foundation are 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 (in the context of eMundus as well as POERUP and other OER-related projects at both institutions) are willing to collaborate with this Hub so as to reduce the overall global cost of collection of such information. Since a key part of Hewlett's proposal is that all information is to be available via Linked Open Data it will be relatively easy for the POERUP wiki to consume any information produced not already on the POERUP wiki and database. The POERUP wiki and database can already produce Linked Open Data in a variety of formats including JSON.

6. Contribution to EU policies

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 a very early approach to POERUP policy work was demonstrated in a multi-project OER workshop just before Online Educa Berlin in November 2012 – www.slideshare.net/pbacsich/oeb-oerwspoerupbacsich – and in some position papers to DG EAC. POERUP staff attended all three of the IPTS foresight workshops on Open Education 2030 in May/June 2013, which built on *Rethinking Education* and provided input into the EU *Opening Up Education* initiative.

The POERUP review of current policies across the EU (Deliverable 4.1) showed that only a small minority of EU countries have any national OER-specific policies and where these exist they are often limited to open access to publicly funded research. In reviewing policies, distinctions need to be drawn between (1) active, operational policies, (2) declarations of policy intentions – often reflecting aspirations rather than reality, (3) strategies promoted by governments and educational organisations, and (4) OER *initiatives*. During the first 18 months of the POERUP project many OER initiatives across Europe appeared to be slowing down or ending, but the past year has seen a resurgence in many EU countries – not least in Germany, where there are still reservations at federal level about OER, but significant grassroots and Länder-based activity. It was against this background of "few policies but growing numbers of initiatives" that POERUP policy recommendations were made.

The EU *Opening Up Education* initiative was launched in September 2013, with an early presentation at the EFQUEL Innovation Forum, where the POERUP draft policy recommendations to the EU for universities and for VET were also launched. Although Opening Up Education covers a broader territory than OER, the language of many of the 'Key Transformative Actions' is very similar to the POERUP recommendations. POERUP draft policy recommendations for schools were also completed shortly afterwards, mapped against Opening Up Education and maintained in a beta state through presentations at conferences, the pre-conference workshop before Online Educa 2013 and a final IAC workshop, through winter 2013 and spring 2014, with the policy recommendations modified and refined through discussions amongst the POERUP partners and with external experts and stakeholders, culminating in a three-part Deliverable 4.2 of final recommendations, for universities, VET and schools.

Whilst the EU policy recommendations were firmed up, policy recommendations for the UK, France, Netherlands, Poland and Canada were developed, derived from the EU-wide set and tailored to the individual countries through further research on current policies (of which there not many), workshops and webinars with key stakeholders – e.g. www.surf.nl/themas/leren-en-toetsen/open-en-online-onderwijs/strategieworkshops-open-en-online-onderwijs/ and other events (Netherlands), education.okfn.org/open-education-wales/ (Wales), openscot.net/ (Scotland), the UK as a whole: www.slideshare.net/pbacsich/policies-for-uptake-of-oer-in-the-uk-home-nations?qid=e260b5b0-920a-4d11-bca0-019334170477&v=default&b=&from_search=11 and smaller European countries: www.slideshare.net/pbacsich/ocwc2014-policiesbacsich-final-and-refs?related=1.

This process culminated in a multi-part report (Deliverable 4.3), of policy briefs for each country covered.

Policy recommendations for the EU and generic member states can be grouped under nine headings:

- Communication and awareness raising
- Funding
- Copyright and licensing
- Regulatory barriers
- Quality
- Teacher training and continuous professional development
- Certification and accreditation
- Infrastructure
- Further research.

The POERUP recommendations, drafted before the launch of Opening Up Education, aligned closely with its *Key Transformative Actions*, in some cases using almost identical wording.

In the area of Quality, POERUP emphasised the need to ensure that OER meet accessibility standards that enable all people with disabilities to enjoy equal access to resources; this was not reflected in OUE, since accessibility is the province of a different Directorate.

POERUP also identified areas where innovation could be taken further than the use of structural investment funds: the Commission could not only use investment funds to create and support new and innovative institutions of higher education focusing on distance learning, but could also dismantle regulatory barriers inhibiting the growth of new kinds of HE providers (e.g. for-profit, from outside the country, consortial, etc). For specific details the reader is referred to the individual documents, all available on the wiki and the web site.

7. The wiki

It seems already a tradition in EU projects that projects using wikis devote a section to them in their Progress and Final Reports. POERUP did not want to break this tradition, hence this section.

The POERUP wiki 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 it deliberately contained no content until *after* the bid was submitted on 31 March 2011. The wiki software at the end of the funded period was MediaWiki version 1.23.1 (25 June 2014) with many extensions including Semantic Wiki and Maps – this is the standard offering from the Referata organisation that supplies the wiki service.

By 7 April 2011 the wiki contained content (one page!) although no indication was given of which specific people or institutions were promoting the POERUP bid. 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 Gr inne 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 luoerl.referata.com/wiki/LUOERL, with its links to Mendeley). Thus by the time the POERUP 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 10 July 2014 unless otherwise noted (figures as in the Progress Report, of 28 February 2013, are in brackets).

The POERUP wiki had 35 (28) 'human' users with editing rights – poerup.referata.com/wiki/Special:ListUsers. User codes are restricted to staff members of POERUP partners and those consultants contracted for reports and related studies who are keen to edit direct on the wiki. The users active in the last 30 days were shown at poerup.referata.com/wiki/Special:ActiveUsers – 6 as of 10 July – recent work had been on finishing off updates to country reports. To see what pages a user has edited, see *User contributions* – e.g. for *Pbacsich* see poerup.referata.com/w/index.php?title=Special:Contributions&offset=&limit=500&tagfilter=&contribs=user&target=*Pbacsich*&namespace.

The wiki had 451 (317) content pages out of a total of 911 (626) – including redirects, special pages, etc – and 50 (27) uploaded files. There had been 4828 (3791) edits done, an average of 137 (135) per user, though unevenly distributed – 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 was 373,321 (134,443). The most commonly viewed page was the Main Page with 53, 912 (18,162) views – and the most commonly viewed country page was Portugal with 6996 views (was the United Kingdom with 1295 views). Other useful statistics are listed at poerup.referata.com/wiki/Special:Statistics.

As the figures show, especially total page views, there had been a doubling of viewings in the second half of the project.

The Exploitation phase

Unlike in VISCED where the wiki was held static for some months, it was strongly felt in POERUP that the wiki had to continue to evolve in order to foster and support the growing level of OER-related analytic activity spinning out from POERUP, including but not only eMundus, SharedOER, and D-TRANSFORM. (The figures in parentheses below were the situation at 10 July 2014.)

Six weeks after the July census date, on **30 September 2014** the POERUP wiki had 1796 (451) content pages out of a total of 3566 (911) – including redirects, special pages, etc – and 85 (50) uploaded files. There have been 10,574 (4828) edits done.

The total number of page views was 431,667 (373,321). The most commonly viewed page continued to be the Main Page with 57,614 (53, 912) views – and the most commonly viewed country page was Portugal with 7363 (6996) views, closely followed by Romania and the POERUP page. Other useful statistics are listed at poerup.referata.com/wiki/Special:Statistics.

The exploitation phase is making strong use of the semantic wiki and semantic map features. The POERUP wiki contained 27,737 property values for a total of 57 different properties. 70 properties have an ‘own page’, and the intended data type is specified for all of those. (For more detail see poerup.referata.com/wiki/Special:SemanticStatistics.)

The large increase in the number of pages is due to the loading of the POERUP OER Map database of 501 initiatives into the POERUP wiki and to the import of several hundred virtual university initiatives, virtual school initiatives and region pages from the Re.ViCa/VISCED wiki, combined with an active process of creation of quantitative ‘city pages’ for many towns and cities of relevance to POERUP, based on linked open data. This now allows information from the older wiki projects to be represented and processed with the semantic search and mapping tools available to POERUP.